

# Alexandria Makeover

## Getting Started

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Unknown macro: 'rate'

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## Overview



We are thrilled to announce our Alexandria and Textbook Tracker Dream Makeover! Yep, that's right, we're giving the programs a new look—for the first time since v7 was released in 2014—while adding various improvements, such as responsive design and exciting features.

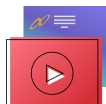
We know change can be tough, especially when you run a busy library. Our goal is to make this a smooth, stress-free transition for you and your library. How? With free webinars, [new videos](#), expanded [in-app help](#), and more—in addition to a gradual timeline.



The Alexandria Dream Makeover has been released! This page will no longer be updated. For future changes in Alexandria, sign up for [release updates](#).

Look forward to betas for Bulletin Boards Builder and Reports coming soon!

Join us for our webinar!



[Watch the recording of the Q&A Webinar!](#)



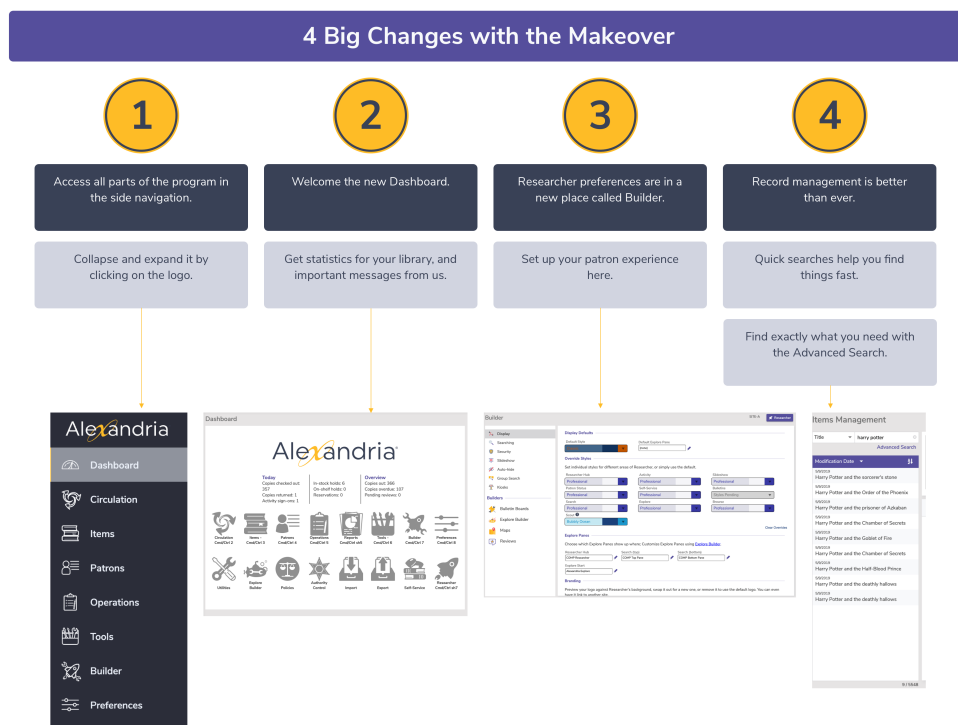
[Read our frequently asked questions!](#)

# Alexandria Makeover

We have a number of resources for you to get ready for the change. Watch our **recorded webinar**, sign up for our **Q&A webinar** (above), [see all the new features in the Changes tab](#), and **try it out** in our demo: <https://demo.goalexandria.com/circulation>

Last Updated: \$action.dateFormatter.formatDateTime(\$content.getLastModificationDate())

## Watch the Overview Webinar



## Timeline

The Makeover project began in 2018 and we are finally ready to share it with you.

Betas for **Circulation**, **Patrons** Management, **Items** Management, **Operations**, **Builder**, **Preferences**, **Tools**, and **Dashboard** were released for your use over spring/summer 2022. This means you can switch to the beta versions from your Circulation window and try all the new interfaces. This is a great time to give it a try and take a look at all of the cool new features!

We will still be fine-tuning things, so if you notice anything amiss that isn't noted in the Changes tab, send us an email at [uxteam@companioncorp.com](mailto:uxteam@companioncorp.com).

Once everyone has had the chance to get comfortable and familiar with the new interfaces, they will become the default interfaces in early 2023. Don't worry! You'll still have the option of using the old interfaces, but by then, we're hoping you'll love the Makeover as much as we do.

Eventually, the entire program will be updated.

## Email Sign Up

Want to receive special Makeover announcements, sneak peeks, and beta access? Sign up for the email list!



Since the Makeover was released, see the [Upcoming](#) page to sign up for general release announcements, beta email list, and the user group.

## Top 5 Features

- **Quick and advanced searching.** In Patrons and Items, use either a quick search bar at the top of the record list or Advanced Search, which lets you search by just about any field!

- **Accessible and easy navigation.** A new side navigation will let you access anywhere in Alexandria from anywhere else in Alexandria. Also, a new top navigation will allow universal access to recent operations, license information, help, and the site you're currently logged into.
- **New Patron Details.** We appreciated your feedback on our Patron Details survey, and used your suggestions to make the design and organization even better!
- **Homeroom tab patron pictures.** See pictures of patrons in Circulation while looking up homerooms.
- **More in-app help.** A new help icon in the top navigation—which will be accessible from anywhere in the program—will give you access to more relevant Support Center pages, the option to create a Support ticket, and a brand new guided tour for users.

## Important Changes to Know

- A **help icon** in the new top navigation bar is where you'll go to send support tickets, access the Support Center, and view license information.
- In Items Management, the **Copies tab** will become a tab within the title record.
- Each interface will be updated with a modern, standardized color scheme.
- The **keyboard shortcuts** for the modules in the side navigation will change. Watch for a new keyboard shortcut guide!

## Sneak Peek

Click on the images to view larger versions, and sign up for the special Makeover list to see more!

[Check out more new features in the Changes tab](#)

### New Patrons Management

### Old Patrons Management



Do you have feedback or questions about the Makeover? [Take our short survey.](#) (The survey has been CLOSED.)

Changes  
Changes



As of 22.11 this page will no longer be updated. Keep informed of future changes by signing up for our [release announcements!](#)

Curious about what's to come? Here are detailed lists outlining what we're doing to make Alexandria and Textbook Tracker easier and faster to use. Check out the Changed columns to see which changes have occurred already.



Try it out on our demo: <https://ccdemo.goalexandria.com/circulation>

Log in with username **demo** and password **demo**.



Do you have feedback or questions about the Makeover? [Take our short survey](#). (The survey has been CLOSED.)

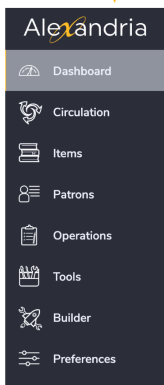
## All Interfaces

### 4 Big Changes with the Makeover

1

Access all parts of the program in the side navigation.

Collapse and expand it by clicking on the logo.



2

Welcome the new Dashboard.

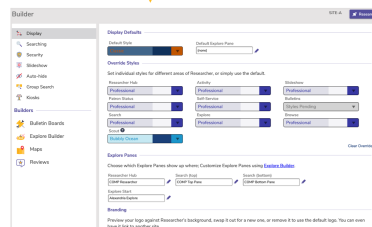
Get statistics for your library, and important messages from us.



3

Researcher preferences are in a new place called Builder.

Set up your patron experience here.

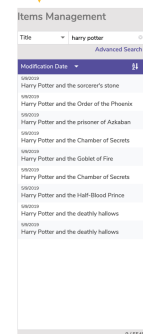


4

Record management is better than ever.

Quick searches help you find things fast.

Find exactly what you need with the Advanced Search.



- The first time you (your user) enter every interface, you'll see our new tutorials! Or to see them again, go to the Help menu and choose 'Intro to...'
- ESC doesn't cancel out of some dialogs.
- -
- The first time you enter every interface, you'll see the 'this is still in

beta' alert. That is intentional, since they are still in beta 😊 (as of 22.8/22.9 this will no longer happen)

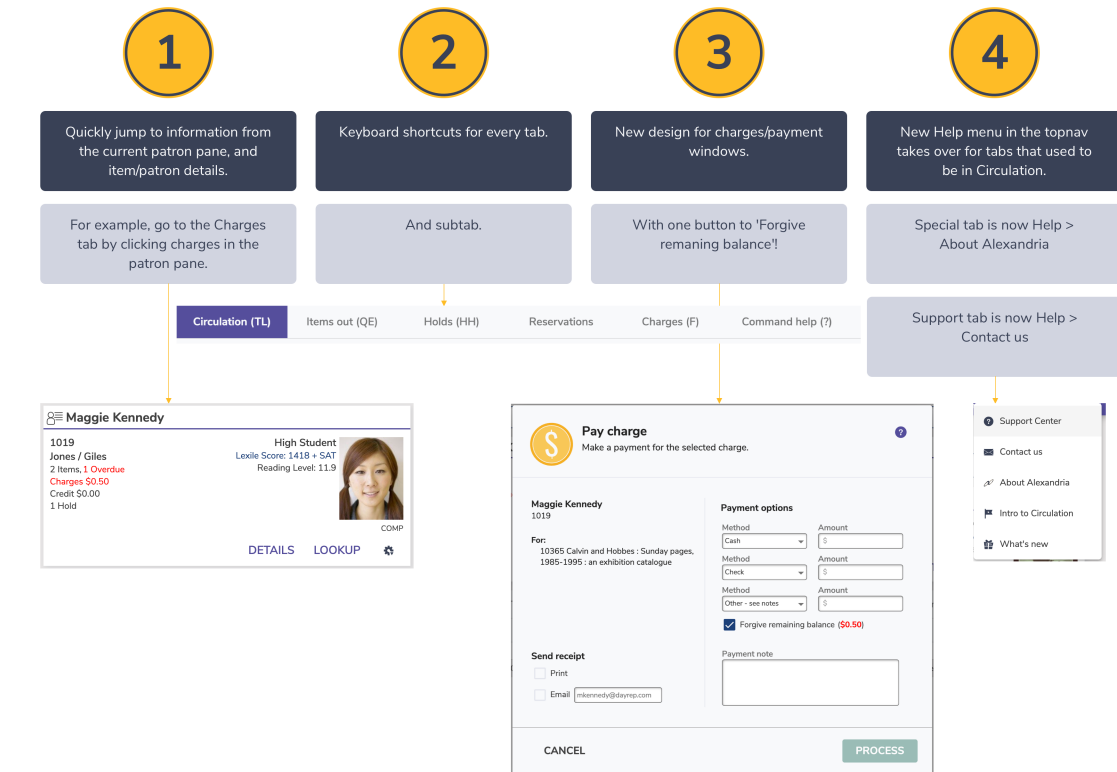
- Dashboard quick buttons won't open up the beta interfaces. This is intentional. (as of 22.8/22.9 it will work as expected)
- We are behind on our Spanish translations! We have new translations and are scheduled to add them with 22.10.

#### Here are some things you can look forward to across the whole program:

- New interface and new icons
- **Responsive design** (resized for a better experience across all devices, including iPads and mobile phones)
- WCAG 2 AA compliant **accessibility** in regard to responsiveness, colors, text size, help text, tooltips, errors /validation, and more
- Alexandria is now purple, and Textbook Tracker is yellow—it's easy to tell them apart! (To prepare, Alexandria colors became purple in 21.9)
- In-app **tutorials** to help new users, and show off new features
- Organizational and textual changes to tabs and dialogs to improve flow and clarity
- **In-line errors** to let you know when a data entry mistake is made (including character limits)
- Indication for **required fields** and Authority Controlled fields
- Confirmations show in "**snackbars**" instead of dialogs, which means less clicking
- New **top navigation** that allows you to see your site and operator, log out, and access help, messages, and operations from anywhere
- New **help** icon in the top navigation that will give you universal access to viewing the Support Center, sending a Support ticket, and checking license information
- New **side navigation** that allows you access to anywhere in Alexandria from anywhere in Alexandria
- Various **tips** regarding the current interface will appear at the bottom of the side navigation
- Visible **keyboard shortcuts**
- Click on patron pictures and cover art to **view larger images**
- **New login** windows and messaging (21.12)

## Circulation

### 4 Big Makeover Changes - Circulation



- Patron Lookup is sorting by last name but not sub-sorting by patron first name. ([schedule 22.10](#))
- Some issues with the Barcode Range command. ([schedule 22.10](#))
- LA command isn't looking up by site. ([schedule 22.11](#))
- For really long titles/subtitles the Items out tab is pushing other columns off the screen.
- Can't remove Reserves.
- Are **sounds** not behaving right for you? Or are you experiencing any lagging? Please use the help menu in the topnav > **Contact us** > send us a message letting us know! Thank you!
- If you've had your Circulation open for a long period of time with lots of transactions, the transaction log may cause Circulation to be bogged down. Try refreshing and it should solve the issue. We are looking into ways to optimize this 😊
- -
- Switching modes with the dropdown menu takes focus away from the command line. ([fixed 22.6](#))
- Lost Copies mode is missing from the modes dropdown in Textbook Tracker. ([fixed 22.8](#))
- Emailing patron details isn't autofilling the patron's email. ([fixed 22.8](#))
- Current Item doesn't show series information. ([fixed 22.8](#))
- Place Reservation doesn't highlight the range correctly. ([scheduled 22.10](#))
- Removing patrons...doesn't actually remove the patron. ([scheduled 22.10](#))

## Changed

- Renewals tab renamed "Items out" ([7.19.10](#))
- Charges History tab renamed "Payments" ([7.19.10](#))
- Moved the Notes button out of the Current Patron and Current Item pane footers (access via command shortcuts and Actions menus) ([7.19.10](#))
- Added visible shortcuts to some tabs ([7.19.10](#))
- Moved the Command Help tab to the rightmost end ([7.19.10](#))
- New Patron Details ([20.1](#))
- New Item Details ([20.3](#))
- New Copy List, accessible from Circulation (*Alexandria Librarian* [20.3](#) *Textbook Tracker* [21.1](#))
- Repeated buttons have been removed from the Actions menu in both the Current Patron and the Current Item panes ([21.3](#))

## Upcoming

- See patron pictures and today's checkouts in the Homeroom tab ([betas 21.10](#))
- Checkout dates displayed in the Items out tab ([betas 21.10](#))
- Sort by due date in the Items out tab ([betas 21.10](#))
- Forgive Charge button added to Charges tab ([betas 21.10](#))
- Support and Special tabs removed; access these features and information in the new help icon ([betas 21.10](#))
- New and improved charges tabs and dialogs ([betas 21.10](#))
- Can copy text (like the barcode) from Current Item and Patron panes ([betas 21.10](#))
- Lookup by Series ([betas 21.10](#))
- All dialogs have been redesigned for easier use and clarity of information ([betas 21.10](#))
- Brand new icons ([betas 21.10](#))
- Patron Lookup window shows nickname ([betas 22.1](#))
- Charges tab entries now have a tooltip so you can see the full charge note ([betas 22.1](#))
- Nickname shows in Homeroom tab ([betas 22.1](#))
- Level (e.g. Grade) shows in the Current Patron pane ([betas 22.1](#))
- Cover art shows for Lost items in Patron Details ([betas 22.2](#))

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## Items Management

## 4 Big Makeover Changes - Items

1

Always see your main title or textbook details.

This is called the basic info pane. Click the cover art to see the larger image!

2

Copies is a tab.

Move through your titles and still see your copies.

3

Gorgeous new MARC editor.

This is for Alexandria Librarian only. Textbook Tracker doesn't use MARC records.

4

Record management is better than ever.

Do a basic search for titles.

Or drill down with the Advanced Search.

- Some keyboard shortcuts aren't working yet.
- Filtering copies when you have more than 1000 is no bueno.
- When you add a new title then add a copy, the copy doesn't show up immediately in the list. But it's there! Just change to a different title and back. We'll improve this soon.
- Title and copy have to be unlocked separately. If you unlock Copies but not Titles, the add button at the top is still disabled; in this case, add copies using the + icon at the bottom of the copy list.
- -
- Issues with the copy not updating when you change titles ([fixed 22.6](#)).
- Series Volume disappears on save. ([fixed 22.8](#))

### Changed

- Copy notes are with the rest of Copy Information instead of in a separate tab ([7.19.10](#))
- Renamed the Study Programs tab "Programs" ([7.19.10](#))
- Updated the "module entry" (0 results) view to include four helpful links: Add a title, Search for items, View recently added, and View recently modified ([7.19.11](#))
- MARC View is a quick-access toggle (Alexandria only) ([7.19.11](#))
- Alert notes for Textbook copies ([20.7](#))

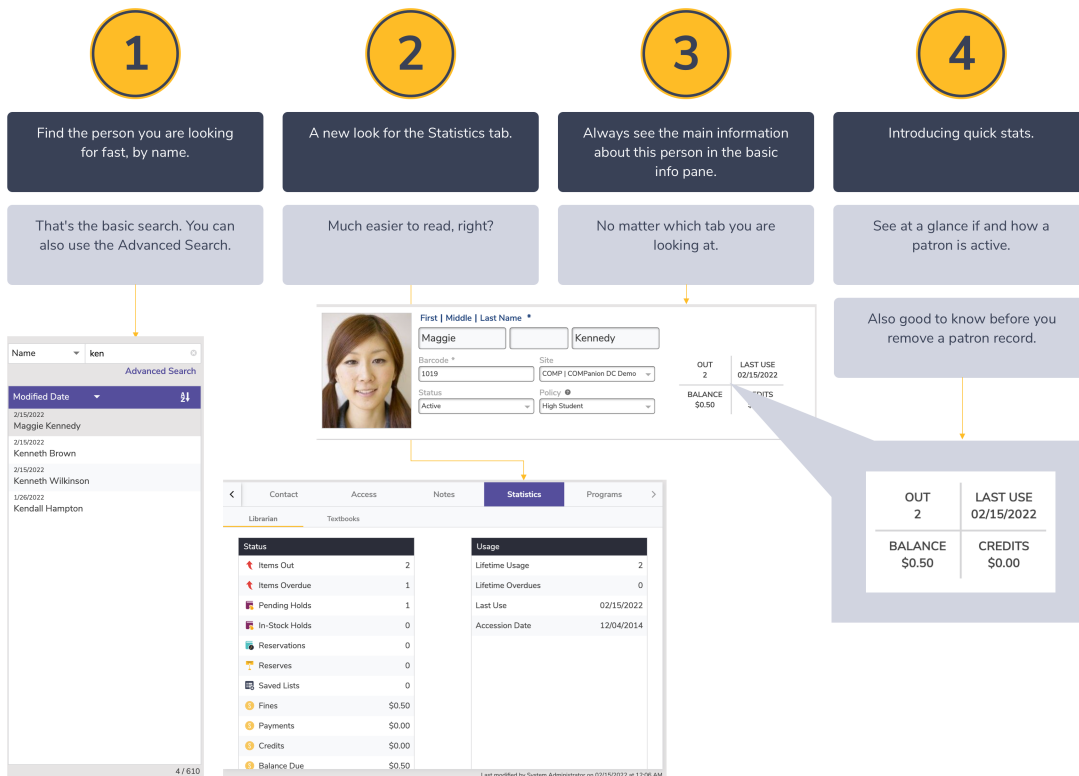
### Upcoming

- Important title information is always visible at the top of the record, and additional information is organized into tabs ([betas 21.10](#))
- Copies as a tab under the title record (so you can always see which title you are looking at) ([betas 21.10](#))
- Split searching into basic searches and Advanced Search (search just about every field) ([betas 21.10](#))
- Select multiple records at once to export or remove ([betas 21.10](#))
- !! Removed Copy ID (no longer useful) ([betas 21.10](#)) >> [Replace with Copy Tag \(22.9\)](#)

- Icons to indicate medium (Library only) (**betas 21.10**)
- Quick searches, adding, and actions buttons are at the top for easier access (**betas 21.10**)
- Return 500 records by default instead of 200 (**betas 21.10**)
- Last modified log will show the last few times the record was modified, and by whom, so you can track down any issues. (**betas 21.10**)
- Record list displays the sort field in addition to title (for example, if you sort by call number, each call number will show above the title in the record list) (**betas 21.10**)
- Indicator for Authority Controlled fields (**betas 21.10**)
- Copy Tag field for Textbook copies (**betas 22.4**)
- Copy List available in Textbook Management (**betas 22.4**)
- When adding copies, see indicators of the barcode/call number (**betas 22.6**)
- Sometimes you just need to remove a title or copy record, even if there are copies checked out, holds, etc. Now you can remove copies anyway. (**live 22.9**)
- Manually queue cover art for automatic updates or turn it off - **scheduled for 22.9**

## Patrons Management

### 4 Big Makeover Changes - Patrons



- Advanced Search has some interaction issues.
- Grade dropdown isn't working in patron information or Advanced Search. You can still enter it manually but you can't select from the authority-controlled terms.

- Take picture wasn't working ([fixed 22.9](#)); if you try and it doesn't let you take a picture, check your browser permissions!
- -
- Merging more than 2 patron records at a time doesn't work but it looks like it does. ([fixed 22.9](#))

## Changed

- New Nickname field ([7.19.11](#))
- Updated the “module entry” (0 results) view to include four helpful links: Add a patron, Search for patrons, View recently added, and View recently modified ([7.19.11](#))
- Moved Site Access, Security Group selection, and Username /Password fields to the new Access tab ([7.19.11](#))
- Removed some sorting options: sequence #, username, and creation date ([7.19.11](#))
- Removed some quick search options: Modified Today, Created Today, Modified in the Last Week, and Created in the Last Week (essentially Recently Created and Recently Modified, which we still have) ([7.19.11](#))
- Renamed the Personal Info tab to Personal ([7.19.11](#))
- Renamed the Lexile tab to Programs, which now has two sub-tabs: Study Programs and Lexile ([7.19.11](#))
- Moved the Email field to the Contact tab ([7.19.12](#))
- Split the email field into two: Primary Email and Other Emails ([20.1](#))

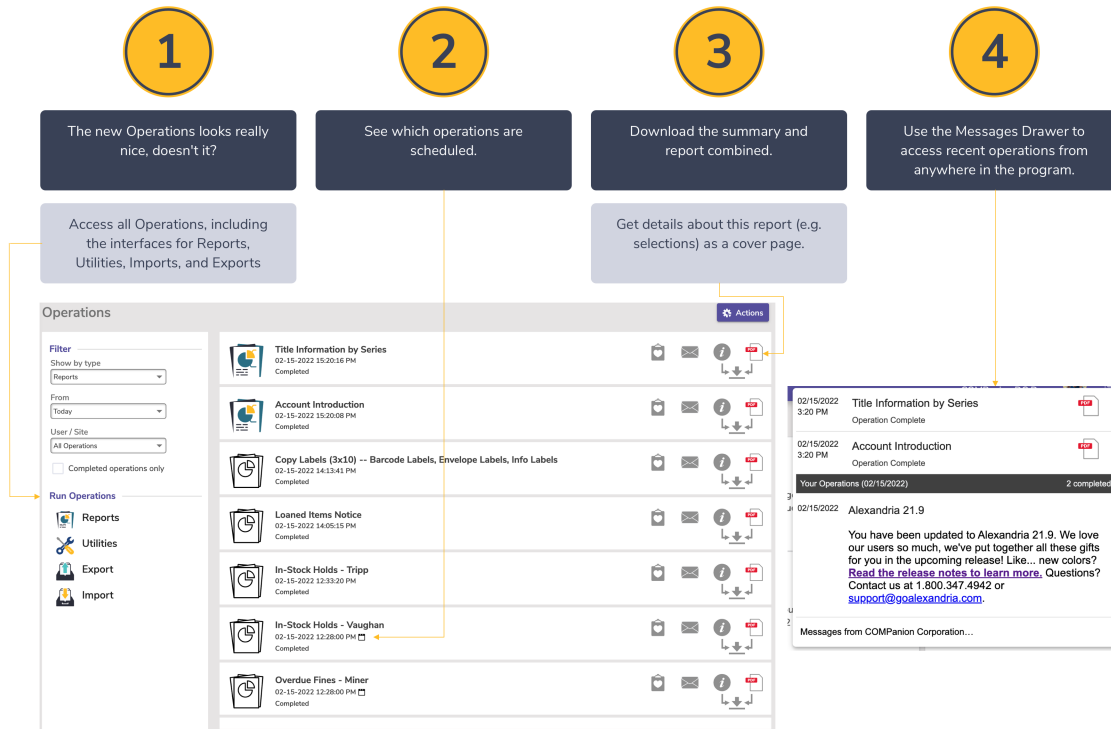
## Upcoming

- Important patron information is always visible at the top of the record, and additional information is organized into tabs ([betas 21.10](#))
- Split searching into basic searches and Advanced Search (and you can search just about every field!) ([betas 21.10](#))
- Select multiple records at once in order to remove ([betas 21.10](#)) or merge - [scheduled for 22.9](#)
- Patron statistics will be easier to read ([betas 21.10](#))
  - Split up Librarian and Textbooks statistics into subtabs
  - Statistics no longer shows Last Modified or Current Policy because of redundancy
- The ability to remove patrons even if they have items checked out—the confirmation dialog will list the results of the removal: the items that will be declared lost, charges that will be forgiven, and credits that will be removed ([betas 21.10](#))
- Return 500 records by default instead of 200 ([betas 21.10](#))
- Last modified log will show the last few times the record was modified, and by whom, so you can track down any issues. ([betas 21.10](#))
- Record list displays the sort field in addition to patron names (for example, if you sort by barcode, each patron's barcode will show above their name in the record list) ([betas 21.10](#))
- Ascending and descending sort order ([betas 21.10](#))
- Quick searches, adding, and actions buttons are at the top for easier access ([betas 21.10](#))
- Quick stats is interactive! Click the different information to jump to Circulation items out or Charges, or Patrons statistics tab ([betas 21.12](#))
- Sometimes you just need to remove a patron record, even if that patron has items checked out, or fines, or credits, or so on. Now you can remove the patrons anyway, and Alexandria will set their checked out items to lost, cancel their holds, and so on. ([live 22.9](#))

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## Operations Management

## 4 Big Makeover Changes - Operations



- List of operations sometimes takes a while to show.
- Opening one of the other modules from here (e.g. Reports) opens it in a new tab/window—this is intentional, although eventually we hope to keep it in the same tab!
- -
- Filter by Type doesn't always work right. (fixed 22.8)
- Completed operations aren't showing in the messages drawer. (fixed 22.9)

### Changed

- Added a new dropdown that sorts operations by *My operations* or *All operations* (20.1)

### Upcoming

- More noticeable filters (betas 21.10)
- Links directly to different interfaces that run operations (betas 21.10)
- Access your report PDFs from anywhere in Alexandria (via the topnav messages drawer) and always be notified when operations are complete (betas 21.10...kind of) - scheduled for 22.9
- It doesn't look so pretty, but you can pull it up on your phone and download a report! (live 22.8)
- 

## Tools

## Tools

### Manage



Authority Control



Inventory



Sites



Routes



Subscriptions

### Rules



Calendars



Policies



Security

### Services



Activity



Offline Mode



Self Service



Textbook Tracker

- Going to Calendars, Policies, Security takes you through the old Preferences interface—this is intentional, until we can rewrite these apps.
- All old interfaces will open in a new tab; this is intentional.

### Changed

- Added a link to Offline Mode (**20.4**)

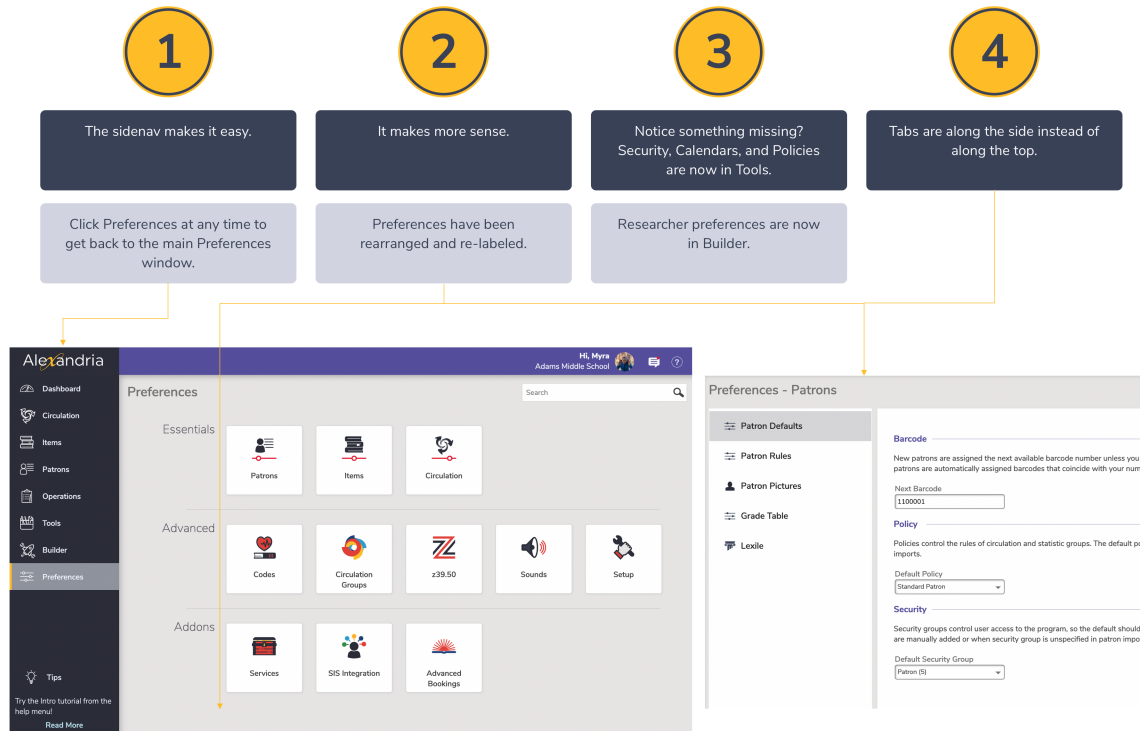
### Upcoming

- Access to Calendars, Policies, and Security (which used to be in Preferences) (**betas 22.1**)
- Better categories for the different tools (Manage, Rules, and Services) (**betas 21.10**)

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## Preferences

## 4 Big Makeover Changes - Preferences



- In general, we recommend adjusting preferences in the old interfaces while Preferences is in Beta.
- -
- Circulation Settings "Enable automatic email notifications" checkbox will toggle the "In Transit Features" on and off, and other weirdness. (fixed 22.7)
- Setup > Email is missing settings. (fixed 22.8)
- Services > BestMARC is missing authentication. (fixed 22.8)
- Setup > Localization > Time zone doesn't actually do anything. (fixed 22.8)
- Print Settings is currently disabled because it's not behaving. You can adjust these in the old preferences. (fixed 22.9)

### Changed

- Rename "Extras" to "Services" (they aren't just 'extra', they're essential!) (20.2)
- New Setup area with less-common settings (keep them tidied up out of the way) (20.6)
- Email, LDAP, and Checkpoint ILS moved to Setup Preferences (from Admin) (20.6)
- SIP2 Preferences moved to the Setup area (20.6)
- Localization and Barcodes settings moved to the Setup area (20.6)

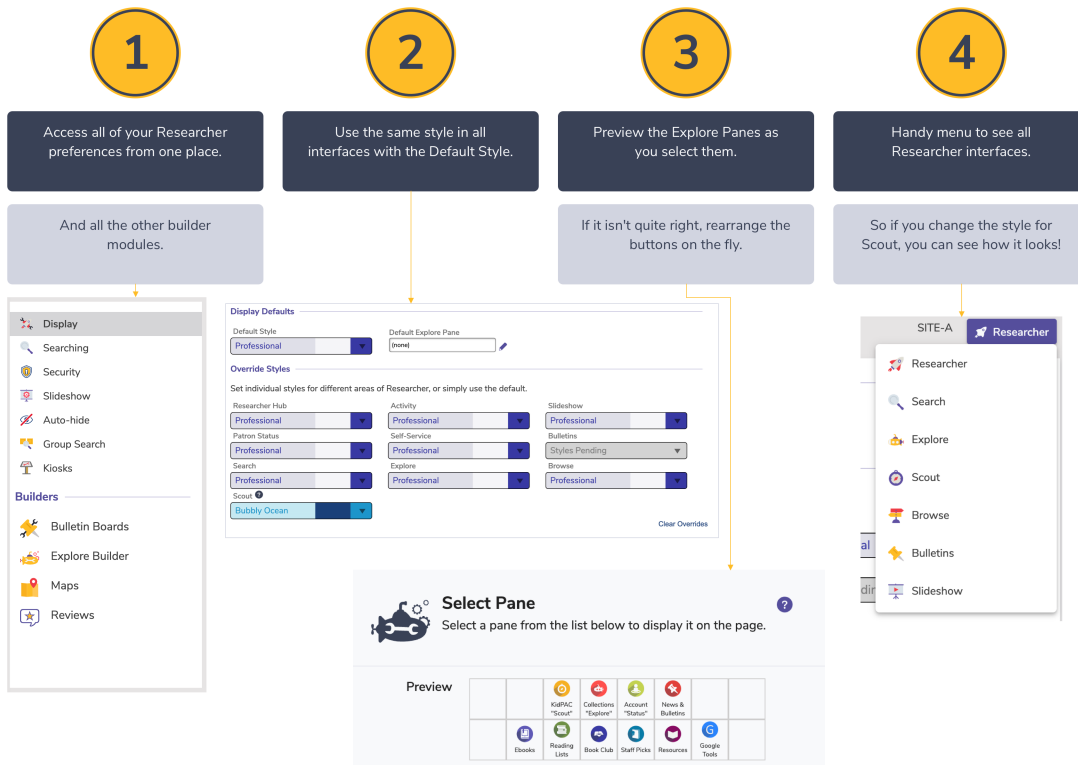
### Upcoming

- More control—toggle each registered service On or Off (betas 21.10)
- Security, Policies, and Calendars moved to Tools (betas 21.10)
- z39.50 requires confirmation to reset to defaults (betas 21.10)
- Researcher settings moved to the Builder (betas 21.10)
- Essential settings reorganized to be more understandable (betas 21.10)
- New preference Preferences > Circulation > Circulation Rules > reservations > for **Default Reservation Period**, so you can change it from 3 days. (betas 22.1)
- New date/time settings with time zone and less complicated date formats (release 22.8)

- You can bookmark specific preferences. e.g. go to [www.yourlibrary.com/preferences/patrons](http://www.yourlibrary.com/preferences/patrons) to jump straight to patron preferences! (release 22.8)
- Easier Overdrive setup with validation - scheduled for 22.10

## Builder

### 4 Big Makeover Changes - Builder (Researcher Preferences)



- Choosing an Explore Pane and trying to view Global panes doesn't look right (scheduled 22.10)
- Log Search Queries preference isn't showing (don't worry, it's there!) (scheduled 22.10)

## Changed

- -

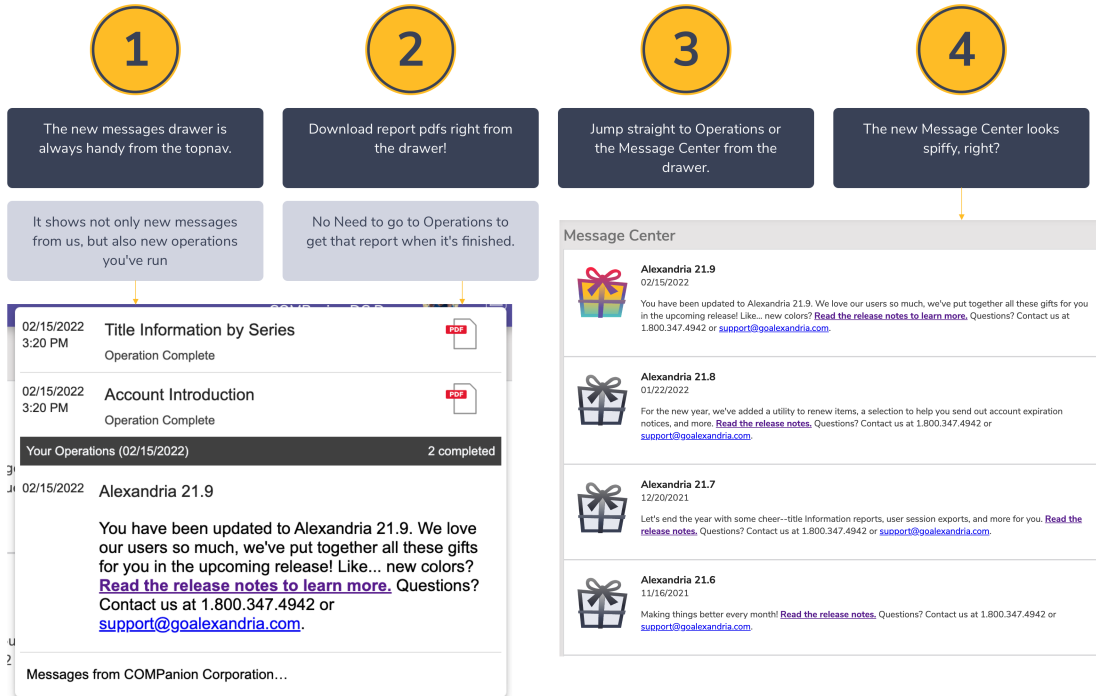
## Upcoming

- Brand new Builder to customize all of your patron settings (betas 21.10)
- Access to Bulletin Board Builder, Explore Builder, Maps, and Reviews (betas 21.10)
- Default Style (easy to set the same style across all patron interfaces) (betas 21.10)
- Easier to see global vs local Explore Panes when setting your Researcher panes
- Set all search preferences at once for all interfaces (e.g. whether or not to show study program) (betas 21.10)
- Easier to preview Slideshows and grab your customized URL (betas 21.10)

- New Kiosks area that includes Activity preferences (**betas 21.10**)

## Message Center

### 4 Big Makeover Changes - Messages



- Nothing. It's obviously perfect.

#### Changed

- Better message storage so Message Center loads faster (**7.19.9**)
- Better icons to indicate what each message is for (**20.7**)

#### Upcoming

- Special sections for highlighted messages (**betas 21.10**)
- Easier-to-read messages (**betas 21.10**)
- Special messages on Dashboard and Login screen for better visibility (**betas 21.10**)
- Also, the Messages Drawer will be the best part of everything... (**betas 21.10**)

## FAQs

### Frequently Asked Questions

Here are some questions we've received about the Makeover! (Other questions are answered if you look at the Changes tab and the main page!)

- What are the **User Settings**?
  - User Settings are where you can adjust the settings that are specific to your account. Turn off and on Tutorials, Reset the Tutorials, turn on/off Quick Login, and set your Default Login Site.
- How can I **contact Support** through the program?

- Use the Help Menu and click Contact Us to fill out a form to send an email to our support team. This is also where you can go to access our Ideas Form.
- Where can I go to see information about my license, such as my **patron/item counts** and when my license expires?
  - Use the Help Menu and go to About Alexandria. This will give you quick access to information about your Alexandria, including your version, license, add-ons, and more.
- How can I **search for specific items** to make changes to the records?
  - Use the basic or advanced search at the top left of Items Management to find the records you're modifying. Once you have the record selected, use the lock icon to the top right to unlock the record and make the changes. Be sure to click Save to save the changes.
- How can I **search** for an item by ISBN?
  - In Items Management, use the Advanced Search and go to the Publication section to enter the ISBN.
- How do I **add a new copy** to an existing title record?
  - With the title record pulled up, either use the plus sign at the top right and select add copy or switch to the copies tab and use the plus sign at the bottom of your copy list, add specific copy information, and click Save at the top of the window and you're done!
- How do I access **Researcher**?
  - Researcher is accessed through Builder, then click Researcher at the top right. You can also use the shortcut from your Dashboard or the Cmd/Ctrl sh7 keyboard command. (See more [Hotkeys](#))
- What is **Builder**?
  - Builder is the new hub for all of our Researcher builders and customization such as color schemes, bulletin boards, maps, etc.
- Show All isn't shown in Preferences and Tools, **how do I go back**?
  - Simply click back on the area you want to go back to on the sidenav to go back to the main preferences or tools page.
- In Patrons, can I change the information shown at the top?
  - No, the information at the top is static when you switch tabs.
- How do I change the contrast? It's very light. (e.g. the white background)
  - Check your machine or display settings.
  - *For those concerned with accessibility, please know that the Makeover complies with WCAG (Web Content Accessibility Guidelines) AA or AAA guidelines.*
- Do our previously created browser **bookmarks** need to be updated?
  - No need to modify your bookmarks, /librarian will now redirect you straight to your Dashboard.
- Where is SmartMARC located?
  - Go to your Items Management, use the lock icon to the top right, click the Add icon (+), and select Add Title.
- I have a Centralized Catalog, how can I search the full district for a title?
  - From the Advanced Search, change the Site dropdown in the Basics category to Any to search the full database.
- Is Dashboard Customizable?
  - It is! Currently, Dashboard is shared for the whole system but you can customize the buttons from Builder > Explore Builder > Dashboard. For more on customizing Explore Builder see [Explore Builder](#).
  - Starting in version 22.12 you will be able to set your own dashboard pane in your User settings.
- How long with the legacy version be available?
  - It will continue to be available about 6–12 months after the release of 22.11 (April).

The Makeover includes brand new interfaces for Circulation, Patrons Management, Items Management, Tools, Operations, Message Center, and Preferences. It introduces Builder, your hub for customizing Researcher for your patrons, as well as Dashboard, a collection of widgets that show information about your library and let you jump to the functions you use most. You'll also see a consistent top bar and side navigation that allow you to navigate the program and access critical functions from anywhere. Eventually the entire program will be updated.

To read about more specific changes, check out the [Changes](#) tab. You can also look at the [Overview](#) tab for information on the Top 5 Features and Changes You Need to Know.

NOTE: The Makeover does NOT affect what your patrons see, as Researcher has not been touched as part of the Makeover.

With Version 7, which was released in 2014, we made the first big step to a modern, web-based product. But the computer world advances fast! With the Dream Makeover, we definitely want to improve how it looks and feels, but we are also updating the code to follow modern standards and be more usable on tablets and phones. This is a switch we slowly started with your Researcher interfaces back in 2015 with the release of [Slideshow](#). And after addressing Scout, Patron Status, and Self-Service, we realized we needed to start updating Librarian interfaces as well. Betas for these interfaces have been released. This means you can switch between using the new interfaces and the old interfaces in your own Alexandria library. This will be a great time to give it a try and take a look at all of the cool new features!

See the Timeline section on the [Overview](#) tab for more information.

Check out the [Changes](#) tab for a comprehensive list of what's changed and what's new in each module. You can also look at our Top 5 Features on the [Overview](#) tab to see what we're most excited about.

Copy IDs are not unique or searchable, and there is not a report that you can run which shows Copy IDs. Copy IDs have become irrelevant, and we encourage using barcodes instead.

\*However we have decided to retain copy id, now called Copy Tag, to allow you to individually mark a copy.

Overall, you won't! We are, however, removing some unused options and moving some things around. Check out the [Changes](#) tab to see specifics. One thing you may want to be aware of is that there will no longer be a button linking to Researcher from the Librarian side navigation. If you use this often, a quick fix is simply bookmarking Researcher on your internet browser.

Feel free to contact Support at 1-800-347-4942 or [support@goalexandria.com](mailto:support@goalexandria.com) if you feel like something is missing.

Nope! This upgrade is included in your Alexandria subscription, as long as you are current. Still on v6? [Learn about switching to 7!](#) This is also a good time to consider switching to [Cloud Hosting](#) if you don't already have it.

We think so! With the addition of new in-app tutorials, What's New highlights, and rollover help text information, we think learning the new interface will be a breeze. And, you'll have videos and our 247/365 Support available to help you along the way.

Yep! If you missed the webinar, you can [watch it now](#), and see all the videos on our [YouTube channel](#). We will also be hosting a free Q&A webinar.

You can also purchase additional training by contacting our sales team at 1-800-347-6439 or [sales@goalexandria.com](mailto:sales@goalexandria.com).

Yes they can! From the old Circulation, Items, or Patrons, click on the purple warning icon on the top right. This will open the beta for you to work in. If you find any issues, please send them to [uxteam@companioncorp.com](mailto:uxteam@companioncorp.com)!

Reports are accessed from Operations.

You can! The checkbox makes it easy to forgive an entire charge all at once, but you can easily forgive only part of the charge by unchecking "Forgive Remaining Balance," and select "Forgive as a Payment Option" method. Enter how much of the charge you'd like to forgive, and click Process.

Yes! Our printable System Hotkeys Reference is in our Support Center [Getting Started Resources](#), and has been updated. Also, you can find ALL shortcuts on the [Hotkeys](#) page. These have been updated.

### Not changed in the Makeover...

- How can I see all the items a patron has checked out in the Items Out tab in Circulation?
  - Use your mouse to scroll down to see the full list.
- How can I access Inventory Management?
  - Inventory Management can still be found under Tools.
- When entering a homeroom in Patrons Management there is a list that comes up, where is that list pulling from?
  - The Homeroom or Location field is an authority-controlled term. To view or modify the list, go to Tools > Authority Control > Patron > Homeroom.
- How can I edit a copy record to have a different call number than the title record?
  - You will need to make the changes on the call number filed on the copies tab within the item record.

You can pay multiple charges at once, but they will have separate receipts.

No. You will need to use the [System Patrons](#) in Circulation to change copy status.

Yes, you can specify the date added in the Advanced Search> More.

With the image saved to your computer, you can either drag and drop the image into the cover art space, or use the + icon and choose a file from your device.

From Circulation, use the X command to clear the current Patron and Item panes. More information can be found [HERE](#).

### Not related to the Makeover...

- Can patrons see what they have checked out in self-service?
  - Not at this time. If this is something you would like to see, please fill out our ideas form at <https://www.goalexandria.com/ideas>
- When adding certain information for patrons, an autofill list appears. Can we turn that off?
  - The autofill list is coming from your Authority Control there is no way to turn the feature off. You can use Authority Control to clean up your terms.
- How do we change the font to be bigger?
  - The size of your screen is directly related to your browser zoom. Use Cmd/Ctrl + or check your browser settings to zoom in.
- How can I add different icons to Explore Builder?
  - Drag and drop icons in the Explore pane you want to modify. For more on customizing Explore Builder see [Explore Builder](#).

Not at this time. If there are ideas you want us to implement into researcher, please submit them here: <https://www.goalexandria.com/ideas>

No. Over the last several months, we have been working on improving and consolidating the reports—but any of those changes are outlined in the release notes. The functionality of the reports will not change in the makeover.

You can add patrons from your SIS by running a [Patron Import](#) or with our [SIS Integration](#).

You can access [Advanced Bookings](#) from Circulation. Any reports you run can then be accessed in Operations.

## Webinar

Your browser does not support the HTML5 video element

### Alexandria Makeover Webinar

Learn more about our Alexandria Dream Makeover!

## Alexandria Makeover Q&A Webinar

Get your questions answered!

And check out answers to the [frequently asked questions](#) about the Makeover.