

Switch to Alexandria 7

Getting Started

How helpful was this page?

 Unknown macro: 'rate'

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Are You Ready?

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Are You Ready?

Your success is our top priority. We want your switch to Alexandria 7 to be as easy and straightforward as possible — once you've switched, you can't go back! So let's go over all the things you need to know.



20230207 This page will no longer be actively updated. Most people have moved to v7. For any remaining v5 or v6 users, please review the information on these pages and contact our Support team to be updated ASAP, as those versions are no longer supported.



It's important to understand that while there are many similarities between Alexandria 6 and 7, they are not the same program. Researcher and reporting, in particular, have changed significantly to create a better experience. Please set aside some time to review this page to ensure a smooth conversion. We have included time estimates for each step.

Not sure if you're using Alexandria 6 or 7? From **Circulation**, go to **Special > System Info**.

If the listed version looks like 6.XX.XX (e.g. 6.23.1), you are on version 6.

If the listed version looks like 7.XX.XX (e.g. 7.17.12) or XX.XX (e.g. 20.11), you are on version 7.



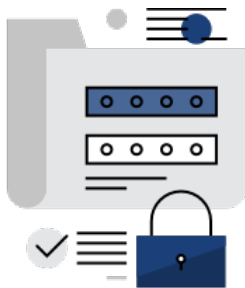
Prepare

Learn the differences and try the demo.



Things to Do

Record some important information.



Data Conversion

We'll walk you through every step.

Switch to Alexandria 7

Prepare

Prepare section.dateFormatter.formatDateTime(\$content.getLastModificationDate())

Time Estimate: 60 minutes

Interested in making the switch? Here's what you'll need to do!

[Contact Us](#)

[Fill out the interest form](#) and we'll get back to you, or directly call your Account Executive at 800-347-6439 and let them know you want to make the switch. They'll go over your license and subscription options, and explain everything you need to know to make an informed decision. Then, if you want to proceed, they'll transfer you to Customer Support to make sure your system is ready.



Central Catalogs and Controllers

Everyone should be in the know, so we'll contact all of the end users at each active site to make sure they understand what's going to happen and how it will affect them.

Prepare



Consider Cloud Hosting

Alexandria 7 is designed and optimized for the cloud. If you're running a self-hosted library, start saving time and resources with [Cloud Hosting](#). Let us be your IT department! We'll manage your data, backups, hardware, server maintenance, and more. You'll always be on the latest version, so you always have the latest features. Ask your Account Executive about moving to Cloud Hosting today.



Consider merging with Textbook Tracker

If you also use Textbook Tracker, this is a great time to consider merging it with Alexandria. There are many [benefits to merging the two systems](#), including the sharing of patrons and various settings for easier management. Note that this is only possible if you're on Alexandria 7 and [Textbook Tracker 7](#). So if you need to update both in order to merge, we recommend doing Alexandria first. Contact your Account Executive if you're interested in this option.



Prerequisites for Self Hosted

Cloud Hosted libraries are already eligible for the switch, but Self Hosted libraries have additional requirements to stay Self Hosted. If you need to update your system, now is the time.

- The library server(s) must meet all [install requirements](#)
- Alexandria must be updated to version 6.23.1



Review the changes

There are a lot of differences between 6 and 7 that will affect how you run your daily operations, and we don't want you to be caught unaware. Read through the list of changes and try out all of your usual activities in the demo. Go to the [See What Changed](#) tab for a list of suggestions.



Things to do

Not everything can be converted and transferred to Alexandria 7. Read the [Things to Do](#) list thoroughly and make note of everything you need to do before the switch.



Video

If you'd like to, watch the [workshop video](#) put together by our certified trainers that goes through what has changed and what you'll need to know.



Back up your data

(If you're coming from v6 Cloud Hosted, we'll take care of the backup for you!) Alexandria will convert your current data into a format that is readable by the new program. Because nothing in life is guaranteed, we strongly recommend that you [back up your data](#) to an **external drive** before making the switch.



Once you make the switch to Alexandria 7, you will not be able to switch back to an older version.

See What Changed

Try it out

Time Estimate: 30–60 minutes

Alexandria 7 was designed based on Alexandria 6, so much of it should be familiar to you, but a lot of things have changed, too. We want you to hit the ground running, so we created Distributed and Centralized Catalog demos for you to try. Open the demo that matches your library setup, then test out all of the features you normally use and note the differences. Use the checklists below as a guide.

Distributed Catalog: demo.goalexandria.com

Centralized Catalog: ccdemo.goalexandria.com



Not sure how to do something? Read our [Support Center](#) documentation or contact Support for assistance.

Better tech

Alexandria 7 doesn't require any client installations! It's all web based, meaning you can use it from any browser, from your laptop or your tablet, from school, home, or anywhere in the world.

New Researcher interfaces support responsive design, and you can use them on smartphones. (See our [Alexandria Requirements](#).)

It's more secure! Alexandria 7 uses TLS 1.2. Alexandria version 6 uses TLS 1.0. As of March 2020, most browsers are depreciating TLS 1.0 and 1.1.

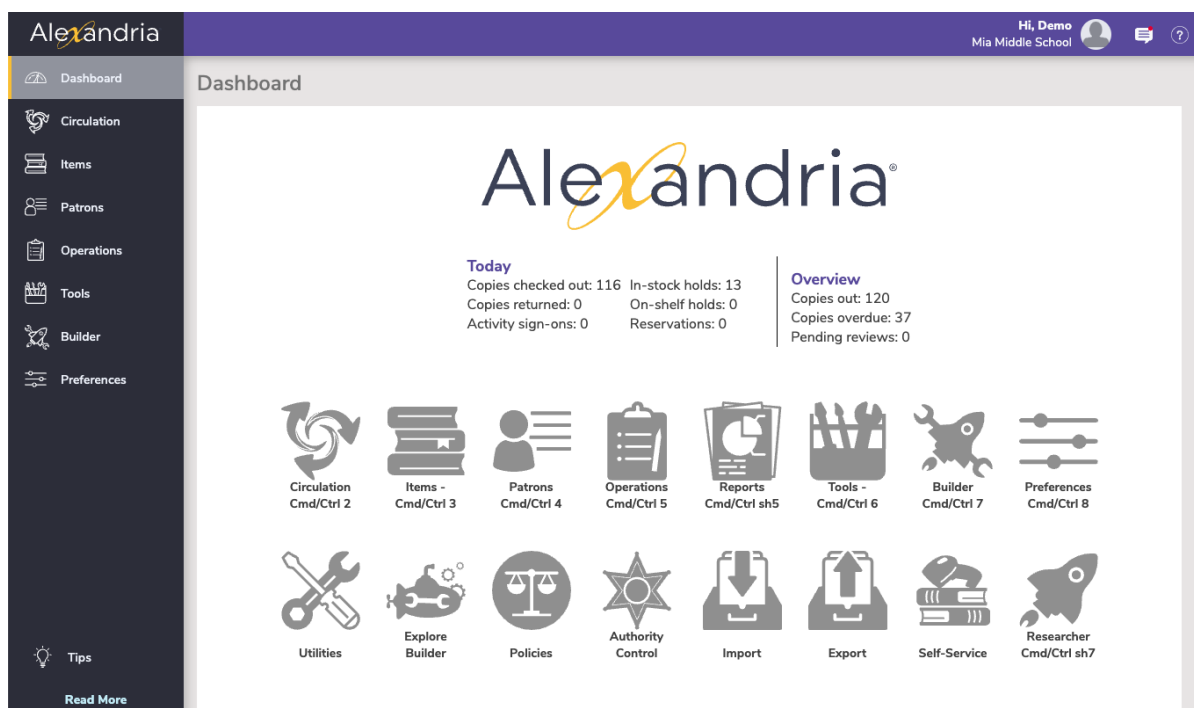
Librarian

We are improving Alexandria with every release. [Circulation](#), [Items](#), and [Patrons](#) are largely the same in both programs, so everything should feel familiar to you. Explore all of the tabs, buttons, and options to see where things were moved.

New features include:

- Merge patrons.
- Interactive Patron Details, Item Details, and Copy List
- New [Textbook Tracker](#).
- New [Activity](#) tracker.

With more major new changes coming with the [Alexandria Dream Makeover](#)...



Integrations

Part of how we are adding more features than ever is by working with our longtime partners for better integrations, and partnering with new services.

- Make managing your patrons easier with [SIS Integrations](#) like [Clever](#) or [GG4L](#).
- Take advantage of single sign-on (SSO) with [GG4L](#).

- Automatically import books ordered through [Bound to Stay Bound](#).

Reports

No more Boolean options, at least not the way you're used to. We've simplified the selection options to only those that are relevant to the specific report, making it easier and faster to get the data you need. Run a quick report as-is, or customize it and save it for use later.

Because Alexandria 7 is a web app, all reports are generated in PDF format; VWP reports are no longer supported.

Old Saved reports will not transfer, so they will need to be recreated. The report titles in Alexandria 7 aren't the same as those in Alexandria 6, but the [Reports Conversion Guide](#) can help you match them up.

- ✓ Run some of your favorite reports and compare the results to those in your current program. Here are a few suggestions:
 - Discarded or Lost Copies
 - Overdue Items Information (Posting format)
 - Loaned Items
 - Overdue Items Notice

We've made customizing your label reports *so much better!* You can choose what information to display, where it's displayed on the label, and whether it's bold, regular, or in color. For variable label reports, you even have the option to choose the font size and number of rows. Try it out!

- ✓ [Customize a label report](#), like Copy Barcode Labels.

Reservations

Making reservations—in both Librarian and Researcher—is a breeze with our improved Reservations interface! There's even a calendar to help you easily select a date range.

- ✓ [Check out the new and simple process](#)
- ✓ [Try it out in the demo](#)

Cover Art

That's right! Now you can choose to include cover art when viewing, emailing, or printing patron details.

- ✓ [See what it looks like](#)

Researcher

Some of the most exciting changes are to our patron searching tools. Researcher is now a collection of tools for patrons. The main page is an [Explore](#) pane, which means you can choose which icons and links to display. The demo has buttons for each of the Researcher modules. Try them out on your computer and mobile devices to see how they work!

- ✓ Go to [Researcher](#) and log in (top left) as a patron.
 - Username: 1001
 - Password: anderson

Explore Builder

The all-new [Explore Builder](#) lets you fully customize your Explore panes. Explore Builder includes hundreds of all-new modern icons at your disposal, so you can create buttons that navigate to predefined searches, specific items in your catalog, saved lists, external websites, panes in Search and Explore, bulletin boards, and more.

Explore buttons from Alexandria 6 will need to be recreated in Alexandria 7. Learn how:

- ✓ [Create an Explore pane](#)
- ✓ [Configure Explore buttons](#)
- ✓ [Modify the Researcher pane](#)

Browse

Students don't always search for a book by author and title. [Browse](#) gives your students a new way to look through your library shelves by genre or study program — no searching or rearranging required.

- ✓ [Browse the demo by genre](#)
- ✓ [Learn more](#)

Explore

Not every student can read yet, but nearly everyone can click through pictures. Explore is a fully [customizable](#), engaging search tool that uses pictures to guide patrons to the items in your library. Explore panes can be set up by genre, topic, theme, or anything else you'd like.

- ✓ [Explore the demo by topic or category](#)
- ✓ [Learn more](#)

Scout

[Scout](#) is a streamlined search tool for the K-4 crowd, because younger students don't need to be confused by complicated search options. There isn't even a search button — just enter a word or phrase and Scout will start looking.

- ✓ [Try Scout on a mobile device](#)
- ✓ [Learn more](#)

Slideshow

Display a slideshow presentation of titles from a list or search string. Use [Slideshow](#) to promote a theme or subject on a TV, computer, or tablet in your library!

- ✓ [See what it looks like](#)
- ✓ [Set up your own Slideshow](#)

Search

Alexandria [Search](#) is highly customizable, powerful, and fast. Find exactly what you want by searching keyword(s) in **Smart Search**, or use the drop-down menu to change the search type. You can refine your search by adding filters, like titles that have won awards or only titles with eBooks.

- ✓ Search for an item (learn [How Search Works](#))
- ✓ Refine your [search results](#) with filters
- ✓ [Place an item on hold](#)
- ✓ [Create a list and add items to it](#)
- ✓ Try an [advanced search](#)

Accessibility

Only in version 7—the Researcher Hub, Scout, Status, Browse, and Slideshow are WCAG AA-compliant! [Read more about accessibility in Alexandria.](#)

Statistics

See how your patrons are searching and accessing your library with the tools available for [Researcher Statistics!](#)



DISCONTINUED

Due to lack of interest, Orders, Budgets, and Third-Party Billing are not available in Alexandria 7. Circulation Groups will soon only be available in Textbook Tracker.

Things to Do

Things to Do

Time Estimate: 30–60 minutes

Alexandria 7 has been completely redesigned as a web app, which means many of the tools and features have changed from what you're used to. Please read through the list carefully so you understand what needs to be done **before the switch**.

Non-transferrable items

The following things *will not* transfer to Alexandria 7, so you'll need to run reports and write some things down. This is a great time to see everything you have and decide what is and isn't coming with you!

✓ Saved and scheduled reports, utilities, exports, and imports

Run the [Operation Summary](#) report for a detailed list of your saved operations. Review the list for operations still in use, then plan some time to recreate them. Report formats and titles have also changed. Use the [Reports Conversion Guide](#) to determine which Alexandria 7 report best matches each Alexandria 6 report.

Learn more: [Saved Reports](#), [Saved Utilities](#), [Saved Items Import](#), [Saved Patrons Import](#), [Saved Exports](#)

✓ Circulation

Circulation will not transfer and will need to be reproduced with transaction scripts. We will try our best to reproduce your circulation; however, there might be missed circulation you will need to reproduce yourself. Please run the following reports so you have a record of your circulation:

- [Loaned Items Information](#)
- All of the special status reports
 - [Archived Copies](#)
 - [Discarded Copies](#)
 - [In Processing Copies](#)
 - [Library Use Copies](#)
 - [Lost Copies](#)
 - [On Order Copies](#)
 - [On Repair Copies](#)
 - [Unknown Copies](#)
- [Charges and Overdue Fines - Complete](#)

✓ Explore panes and buttons

Run the Explore Pane Summary report for a detailed list of your Explore panes and buttons, so you know what to recreate later.

Learn more: [Explore Builder](#)

✓ Researcher lists

[Alexandria Researcher](#) is brand new, which means your Saved lists will not transfer. Make note of the lists you have and want to save.

Learn more: [Search Lists](#)

✓ Researcher links

Researcher links cannot be transferred because they're handled differently now. In Alexandria 7, links are added to the title record and are displayed in the item details in Search results. Write down the URLs of the links you want to save.

Learn more: [Title Record Links](#)

✓ Z39.50 addresses

The z39.50 Address Book has been discontinued in favor of a new stand-alone preference in Alexandria 7. During the transition, Alexandria will convert the top ten addresses set to Available; all others will need to be added manually. If you have more than ten z39.50 addresses, write them down.

Learn more: [z39.50 Preferences](#), [Set up z39.50 Servers for Adding Titles](#)

Miscellaneous tasks

These can be done either before or after the switch, but we recommend you take care of them beforehand.

✓ Print a list of the new keyboard shortcuts.

They have been redone, so they'll need to be relearned. Print off the [v7 Circulation Commands](#) cheat sheet.

✓ Reassign Union Site items (Centralized Catalog).

The [Union Site](#) *cannot* be used to circulate items in Alexandria 7, so all items assigned to the Union Site will be given a copy status of In Processing. Reassign all items from the Union Site to a registered site. If items need to be circulated from a district site, please speak with your Account Manager about purchasing a new district site subscription.

✓ Consider upgrading your printer.

Alexandria 6 slip printers are not compatible with Alexandria 7, so it may be time to upgrade to the [Alexandria Network Printer](#) — it's fully integrated with Alexandria 7 and can be shared by multiple stations.

Video

Switch to 7 Video

FAQs

Frequently Asked Questions (FAQs)

Considering the switch? Check out our answers to common questions to help you make that decision.

Pre-Switch FAQs

Alexandria 7 is the most current version of Alexandria. It's like v6, but way better! Try it out in the [demo](#), and read about [what's changed](#).

Yes! And it's even better than before. With v7 Cloud Hosting, you never have to install anything on your computer—even after major updates. Also, v7 is constantly being improved and developed and we consistently back up your data for you!

Yes, it will. But wait! Our subscription prices are changing across the board. Contact our sales team at 1-800-347-6439 or sales@goalexandria.com to figure out what will work best for you.

While Alexandria 6 itself still works and can connect, it is an old software that has not been updated since 2017. We recommend that you [switch to Alexandria 7](#) at your earliest convenience.

v6 is no longer being developed and we no longer support it.

Here's just a few cool features unique to v7: [merging patrons](#), [Clever & GG4L SIS integrations](#), [custom label reports](#), cover art in [Patron Details](#), [Browse](#), [Slideshow](#), and more!

Check out our [Upcoming](#) page to see recently released features and some exciting things we're working on.

- V7 doesn't have the Orders & Budgets module, so if those are integral to your workflow, you'll want to find alternatives before switching.
- Specialty libraries may find that the cataloging experience is different enough to warrant proceeding with caution.
- Third-party billing is no longer supported in V7.

In general, we recommend writing down any questions or concerns and then scheduling a training. You can also give us a call to go over your concerns and ask our Customer Support if they recommend switching.

Have you recently switched and noticed some differences? Don't worry! We explain it all here.

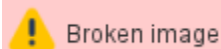
Post-Switch FAQs

Alexandria 7 is a web-based program, so we were required to use a reporting format that is used across all operating systems and web browsers. This is why PDF was chosen.

To make the new Alexandria 7 label reports more dynamic, we've added custom options so that you can still format labels to fit your library's needs. Since Alexandria 7 is a completely web-based program, nothing is installed on your computer. The VWP format would have required installation to operate.

1. Make sure your URL is correct.
2. Try using a different browser on the same device or computer.
3. Test connections off of your network by trying to access your URL on another device, like a cell phone.

If you're still unable to connect, use [Offline Mode](#) to get work done in the meantime and contact our Support team at 1-800-347-4942. You can customize or disable some vendors settings in [Services Preferences](#). Also, you can see a list of your vendors through the [Current Item](#)

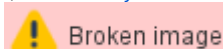


Actions menu in Circulation.

We use some hard-coded Booleans for specific reports (e.g. overdue reports only look for items or temporary items that are checked out with a due date in the past). Also, you can add a bunch of AND Booleans via the Selections tab, and the *Patrons with a Policy of* field in all [Patrons reports](#) allows you to include or exclude multiple policies.

Why did this change? Most people had a lot of trouble setting up their reports this way, so we wanted to make it easier.

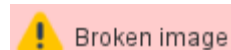
We didn't get rid of any commands, and most of the hotkeys are still there. But as we moved into a browser, we didn't want to override basic browser functions. So, [some hotkeys have changed](#).



Click on the wrench icon at the top right-hand side of the module, or append **/operations** to your URL. This will open up [Operations](#), where you'll find all of your run reports, utilities, imports, and exports. If you keep it open, a noise will sound each time an operation is completed!

If you are Cloud Hosted with us, we take care of all archives and backups for you. But you can also run an [archive](#) yourself using the [Database Archive utility](#). However, you need to be mindful about how and when archives are ran and used. Check out our [7.18.3 Release Notes](#) for more information on why **Archive Before Import** is no longer an option and how you can use archives responsibly.

Check out the [Unused Barcodes report](#).



The headers never had enough space to list all of that information. So we moved it to a separate, detailed file called the [Operation Information file](#). Now you won't miss a single setting!



Name your reports! When you save a report, name it to indicate what it's for (e.g. FIC A - FIC D Weeding List).

Web-Based means Alexandria runs on your browser, like a website over the internet. This means several things:

- You can access your Alexandria anywhere you can access other websites.
- It makes use of various browser technologies.
- It doesn't care if you use Windows, Mac, or Linux—only what browser it's on.

[Cloud Hosted](#) means COMPanion hosts your data, taking care of all maintenance and backups. This also makes it easier to troubleshoot issues.

If you bookmark the Reports module (append **/reports** to your URL), it should take about the same number of clicks. Here are some other things you can do to speed up the process:

- Keep a tab open with Reports (opened to your [saved reports](#)!).
- Schedule your reports and they will be waiting for you in [Operations](#).
- Configure your browser to [automatically open downloaded PDFs](#).

The new Search uses a Smart Search that is significantly smarter than the old one. It may not seem that way if the item you are looking for doesn't show up first, but keep in mind someone using the same search term who is looking for something else. The new Search better allows for your patrons to find items they might not know the exact title for.

- If you are doing a title search, change the search type to Title.
- Learn more about Search Types including Smart Search in our [Search Basics](#) article. See how the different fields are weighted.
- Review our information on [Search Results](#).
- Having trouble finding a book with a common title, such as "It"? Search by title and author (e.g. "it stephen king") to get more exact results.
- Read more in [How Search Works](#).

Conversion

Data Conversion

Time Estimate: 2 business days

Our Conversions team will review the work order and call you in the next week to schedule the data conversion and version upgrade. It doesn't have to be now, though. If you decide you'd rather wait, give us a call back when you're ready. We'll do this on your time.

Time Frame

Your Alexandria library will be down during the conversion process, which which can take about **2 business days** from the time we receive the data; larger districts and Central Unions with 10 or more sites may take longer. We recommend scheduling it for off-peak days.

Cloud Hosted Conversions

Already on Cloud Hosted? Fantastic! We've got everything we need to set up your new server. Easy peasy.

Self Hosted Conversions

The transition from Alexandria 5 or 6 Self Hosted is a bit different. Before we can schedule the transition, we'll need you to send in your library data so we can convert it to Alexandria 7 data. If you're moving to Cloud Hosted, which we strongly recommend, we'll get it set up on your new Cloud server. If you're sticking with Self Hosted, we'll send back your converted data so you can set up your new server manually.



Once your data has been sent, *your database **cannot** be used again* until the switch is complete and your new server is online.

A Word of Caution

We do not provide support for Alexandria Controllers running on a virtual machine. Alexandria Controller is a highly sophisticated database application that should be run on a dedicated server to optimize performance. While you can run it on a virtual machine, we don't recommend it. The resource-intensive nature of a controller's workload can place a significant strain on an inefficient VM, leading to challenges we will not be able to troubleshoot or diagnose. Refer to our [Controller System Requirements](#) for more technical information.

Post-Conversion

Time Estimate: 30–60 minutes

Once your conversion is complete, you'll receive an email from our Operations Team. This will include important account information and some getting started resources.

Here are some specific things you need to do after switching:

- ✓ Recreate all of those non-transferrable items you documented before the switch. You should also take care of the miscellaneous tasks if you haven't already. (See the [Things to Do](#) tab.)
- ✓ [Authority Control](#) has been redesigned and now works completely different than it did in Alexandria 6, and the existing index cannot be moved over. So you'll need to repopulate your Authority Control terms! Do this by clicking on Authority Control's ✓ **Actions Menu** while holding down the **ALT/Option** key; then select **Rebuild All Authority Terms**. Feel free to [contact Customer Support](#) if you would like help.
- ✓ Continue learning about Alexandria 7! Explore the Support Center and use our resources, such as [Tip of the Week](#) and [FAQs](#).