

Researcher Preferences

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Researcher



This page is obsoleted ; see <https://support.goalexandria.com/builder/>

Researcher



Preferences > Researcher > Researcher

SYSTEM Preference

Use this preference to select a custom Explore Pane that will be used for your Researcher landing page. You can also set the style of your Researcher using the Style menu below. Use [Explore Builder](#) to customize your Researcher contents.

Here you can change the style of your **Researcher**, **Explore**, **Search**, **Slideshow**, **Status**, and **Group Search** modules. Once you've selected a style, refresh your browser to see the changes.

Researcher Preferences

Adams Middle School

Site - A

Help

?

Show All

Modules

Researcher

Bulletins

Explore

Search

Scout

Slideshow

Status

Self-Service

Browse

Activity

Group Search

Researcher

Auto-Hide

Coming soon, your Researcher preferences—for all Researcher modules—will be accessed through a new interface called **Researcher Builder**. [Learn more about the Alexandria Dream Makeover!](#)

Select an Explore Pane for your Researcher landing page. You can customize its content in [Explore Builder](#).

Display _____

Researcher Pane AMS Researcher

Style

Logo _____

Add your site logo to Researcher.

Logo .png files approximately 50-100px tall



Logo Link

Module Settings _____

These settings apply to all Researcher modules.

Timeout

Logging _____

Choose to record patron search terms from Search and Scout. These terms are kept in the log for 30 days and can be retrieved via the Researcher Queries export.

☒ Log search queries

Select Researcher Pane

1. Click **Select Researcher Pane** to open the **Select Pane** dialog window.
2. From the list, select the pane you'd like to make style changes to.
3. Click **OK**.

Style

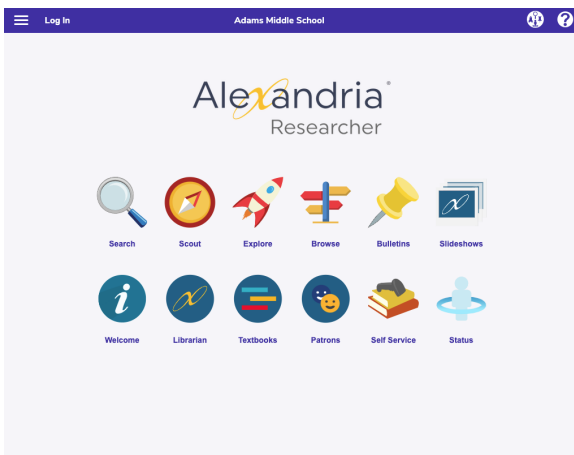
Customize the way Alexandria looks with one of four predefined color schemes:

Classic

Seafoam



Professional



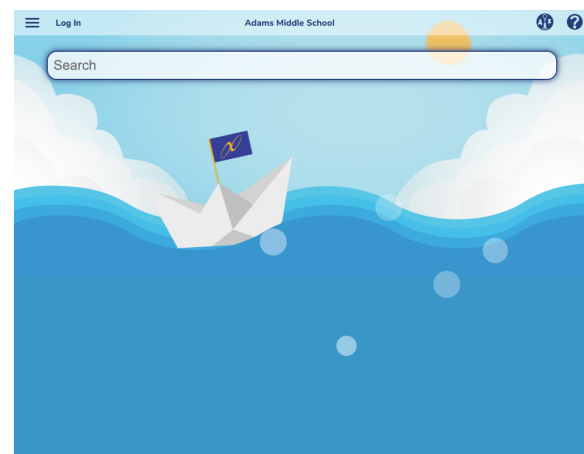
Mosaic



Bubbly Ocean



Bubbly Ocean (Scout)



Logo

You can set your logo to appear on the Researcher pane. Click **Choose File** to locate your logo file on your computer, or enter the URL in the **Logo Link** field.

Timeout

Click the dropdown menu to select when the screen should refresh after inactivity. This will log out users and clear the search fields.

Logging

Choose to record patron search terms from Search and Scout. These terms are kept in the log for 30 days and can be retrieved via the [Researcher Queries export](#).

Explore Preferences

These preferences configure some of your Explore defaults and regulate a few of the general access privileges extended to your patrons and/or operators using the Explore interface. These preferences apply to every instance of Explore that connects to your Data Station; therefore, make your selections thoughtfully as to prevent any problems that may occur when patrons attempt to access or perform certain operations from Explore.

The screenshot shows the 'Explore' preferences configuration page. At the top, there are three tabs: 'Explore', 'Results List', and 'Full Details'. The 'Explore' tab is active. Below the tabs, there are several settings:

- ☐ Require Login to access the Explore Interface
- ☒ Show Site Selection
- Preferred Study Program:
- Style:
- Select Starting Pane:

Settings

- **Require Login to Access the Explore Interface.** When checked, access to the Explore interface requires a valid patron Username and Password. When unchecked, your online catalog is open to the public via your Data Station's IP address. Only check this box if you don't want your collection open to the public.
- **Explore Interface Timeout.** Select how long (in minutes) before the Explore interface clears the current session information and resets for a new search.

- **Preferred Study Program.** The selection made from this drop-down menu affects the reading level that is displayed in the Brief result details.
- **Styles.** This drop down menu allows you to change the [style](#) of Explore.
- **Select Starting Pane.** This opens the Select Pane dialog where you can choose the initial pane that appears when you access Alexandria's Explore ("/explore") interface. You may select one of your existing panes or check the Show Global Panes box to use one of our defaults (i.e. selections prefaced with a "*" in the list). After you have made your selection, click OK. The name of the starting pane selected will then appear to the right of this field.



Watch the [Explore Builder and Researcher Preferences](#) workshop to learn more!

Results List

Explore

Results List

Full Details

☒ Enable Reviews
 Initial Search Results Returned 50 ▼

☒ Show Hold Controls

☒ Show Reservation Controls

☒ Show Map Icon

☒ Show Call Numbers

☒ Show Lexile

☒ Show Study Program

☒ Show Title Availability

Settings

- **Initial Search Results Returned.** Choose the number of search results that are returned per page: 25, 50, or 100. If you receive more results than this setting dictates, click Find More in the Search Results control bar to see what remains.
- **Enable Reviews.** When checked, patrons are allowed to review items in your collection by clicking the five-star rating located item Results Details. When this preferences is not checked, the rating stars disappear—as does the ability to review items.

- **Show Hold Controls.** This enables or disables the Place Hold icon that appears in the Results Details control bar when patrons are logged in. This preference must be enabled in order for patrons to place hold requests on items from the Explore interface.
- **Show Reservation Controls.** This enables or disables the Place Reservation icon that appears in the Results Details control bar when patrons are logged in. This preference must be enabled in order for patrons to request reservations from the Explore interface.
- **Show Map Icon.** This enables or disables the Maps icon that appears in the Results Details control bar when patrons are logged in. If this preference is disabled, patrons will be unable to see maps to specified titles from the Explore interface.
- **Show Call Numbers.** This preference determines whether the title call number will appear above the title name in your brief and /or expanded search results.
- **Show Lexile.** This preference determines whether the Lexile Score (taken from the 521 tag, if available) will appear in your brief and /or expanded search results.
- **Show Study Program.** This preference determines whether your preferred Study Program information will appear in brief and /or expanded search results. The study program shown is determined by the Preferred Study Program setting.
 - Your study program information must be entered correctly in the 521 (; Fountas & Pinnell) or 526 (; Accelerated Reader and Reading Counts) tags; applicable study program information is generally stored in the 526_c tag.
 - Reading level information can be accessed and modified in the Study Program subtab of Items Management. This preference ignores Lexile information; that value is displayed independently, determined by the Show Lexile preference (above).
- **Show Title Availability.** When this checkbox is enabled, a title's availability will be shown in the search results.

Full Details

The **Full Details** is a large, scrollable dialog that allows you to examine *all* the MARC data stored in the selected title record. The more information that an item record contains, the more will be displayed in **Full Details**. This preference determines whether or not to show **Full Details** (or parts thereof) on a site-by-site basis.

ExploreResults ListFull Details

☒ Enable Full Details

☒ Show MARC Tag 000-009 Data

☒ Show MARC Tag 900-999 Data

☒ Show View Full MARC Record

☒ Show Link to Amazon.com

Settings

- **Enable Full Details.** If enabled, clicking the title name (e.g. "The Catcher in the Rye") in Search Results allows you to view Full Details for the selected item. Additionally, checking this box enables or disables the remainder of the Full Details preference settings described below.
- **Show MARC Tag 000-009 Data.** This preference determines whether MARC tags 0-10 are shown in the Full Details dialog.
- **Show MARC Tag 900-999 Data.** This preference determines whether MARC tags 900-999 are shown in the Full Details dialog.
- **Show View Full MARC Record.** This preference determines whether the View Full MARC Record link appears in the bottom-left corner of the Full Details dialog. When the View Full MARC Record link is clicked, it will open a new browser tab containing a text-only version of the title record in MARC format.
- **Show Link to [Amazon.com](#).** This preference determines whether the link to [Amazon.com](#) appears in the bottom-right corner of the Full Details dialog. Clicking on the Amazon graphic link will open the [Amazon.com](#) website in a new browser tab with the closest possible match based on the item's ISBN/ISSN. Additionally, the Amazon link will not appear if the title record is lacking a valid ISBN/ISSN.

Bulletin Preferences

This preference allows patrons to view the electronic bulletins created using the Bulletin Board Management module. Electronic bulletins may be created for each site in your union; these may contain links to websites, including other Alexandria modules.

Require Login to Access Bulletins

- Only check this box if you do not want your bulletins open to the public.
- When checked, access to site bulletins requires a valid patron username and password.
- When unchecked, your bulletins are open to the public by typing **/bulletins** at the end of your Alexandria login URL.

The screenshot shows a web interface for the 'COMPanion Demonstration Library'. At the top, there is a 'Show All' button and a help icon. The main content area is divided into two sections: 'Modules' on the left and 'Bulletins' on the right. The 'Modules' section contains a list of icons and labels: Researcher, Bulletins (highlighted), Explore, Mobile, Search, Scout, Slideshow, Status, and Group Search. The 'Bulletins' section has a title bar and a text area. The text area contains the instruction: 'Use this preference to control access to the electronic bulletins created using Bulletin Board Management.' Below this text is a checkbox labeled 'Require Login to Access Bulletins', which is currently unchecked.

Search Settings

These preferences configure some of your **Search** defaults and regulate a few of the general access privileges extended to your patrons and/or operators using the Search interface. These preferences apply to every instance of Search that connects to your Data Station; therefore, make your selections thoughtfully as to prevent any problems that may occur when patrons attempt to access or perform certain operations from the Search interface.

The screenshot shows a web interface for configuring the search module. On the left is a sidebar titled 'Modules' with a list of icons and labels: Researcher, Bulletins, Explore, Search (highlighted), Scout, Slideshow, Status, Self-Service, Browse, Activity, and Group Search. The main content area has three tabs: 'Search' (active), 'Results List', and 'Full Details'. Below the tabs are several configuration options:

- ☐ Require Login to access the Search Interface
- ☒ Show Site Selection
- Preferred Study Program:
- Style:
- ☒ Show Study Program Search
- ☒ Show Top Explore Pane
 - Select Top Explore Pane:
- ☐ Show Bottom Explore Pane
 - Select Bottom Explore Pane:

- **Require Login to Access the Search Interface.** When checked, access to the Search interface requires a valid patron Username and Password. When unchecked, your online catalog is open to the public via your Data Station's IP address. Only check this box if you don't want the public to be able to search your collection.
- **Preferred Study Program.** The selection made from this drop-down menu affects the reading level that is displayed in the Brief result details.
- **Styles.** The Styles drop-down menu allows the operator to choose one of four Styles: Classic, Seafoam, Professional, or Mosaic.
- **Show Study Program Search.** When checked, shows the Study Programs you library currently offers.
- **Show Top Explore Pane in Search Interface.** This enables or disables the optional “top” Explore pane of your pre-results Search interface. If you don't want to use Explore panes in your Search interface, disable this setting.
- **Select Top Search Pane.** This opens the Select Pane dialog where you can choose what you would like to set as the “top” Explore pane for your pre-results Search interface. You can select one of your existing panes or check the **Show Global Panes** box to include our defaults (i.e. selections prefaced with a “*”) in the list. After you have made your selection, click OK. The name of the pane you have selected will then appear to the right of this field.
- **Show Bottom Explore Pane in Search Interface.** This enables or disables the optional “bottom” Explore pane for your pre-results Search interface. If you don't want to use Explore panes in your Search interface, disable this setting.
- **Select Bottom Search Pane.** This opens the Select Pane dialog where you can choose what you would like to set as the “bottom” Explore pane for your pre-results Search interface. You may select one of your existing panes; alternatively, check the Show Global Panes box to include our defaults (i.e. selections prefaced with a “*”) in the list. After you have made your selection, click OK. The name of the pane you have selected will then appear to the right of this field.

Results List

SearchResults ListFull Details

☒ Enable Reviews
 Initial Search Results Returned 50

☒ Show Hold Controls

☒ Show Reservation Controls

☒ Show Map Icon

☒ Show Call Numbers

☒ Show Lexile

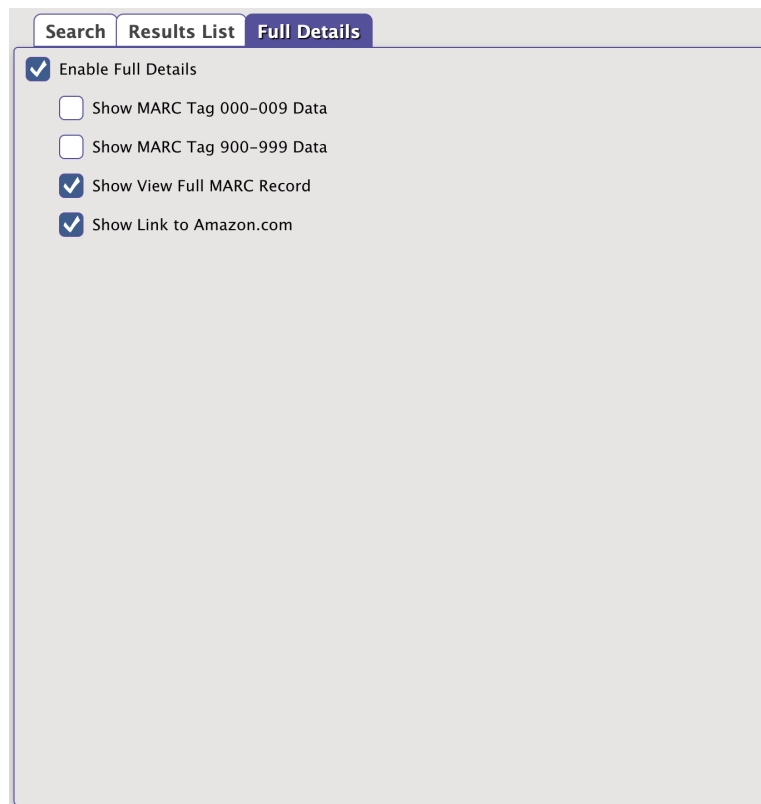
☒ Show Study Program

☒ Show Title Availability

- **Enable Reviews.** When checked, patrons are allowed to review items in your collection by clicking the five-star rating located item Results Details. When this preferences is not checked, the rating stars disappear—as does the ability to review items.
- **Show Hold Controls.** This enables or disables the Place Hold icon that appears in the Results Details control bar when patrons are logged in. This preference must be enabled in order for patrons to place hold requests on items from the Search interface.
- **Show Reservation Controls.** This enables or disables the Place Reservation icon that appears in the Results Details control bar when patrons are logged in. This preference must be enabled in order for patrons to request reservations from the Search interface.
- **Show Map Icon.** This enables or disables the Maps icon that appears in the Results Details control bar when patrons are logged in. If this preference is disabled, patrons will be unable to see maps to specified titles from the Search interface.
- **Show Call Numbers.** This preference determines whether the title call number will appear above the title name in your brief and /or expanded search results.
- **Show Lexile.** This preference determines whether the Lexile Score will appear in your brief and/or expanded search results.
- **Show Study Program.** This preference determines whether your preferred Study Program information will appear in brief and /or expanded search results. The study program shown is determined by the Preferred Study Program setting. Your study program information must be entered correctly in the 521 (; Fountas & Pinnell) or 526 (; Accelerated Reader and Reading Counts) tags; applicable study program information is generally stored in the 526_c tag. Reading level information can be accessed and modified in the Study Program subtab of Items Management. This preference ignores Lexile information; that value is displayed independently, determined by the Show Lexile preference (above).
- **Show Title Availability.** When checked, this preference will show whether or not the items returned in a Search are available to be check out.

Full Details

The Full Details is a large, scrollable dialog that allows you to examine all the MARC data stored in the selected title record. The more information that an item record contains, the more will be displayed in Full Details. This preference determines whether or not to show Full Details (or parts thereof) on a site-by-site basis.



Search Results List **Full Details**

☒ Enable Full Details

☐ Show MARC Tag 000-009 Data

☐ Show MARC Tag 900-999 Data

☒ Show View Full MARC Record

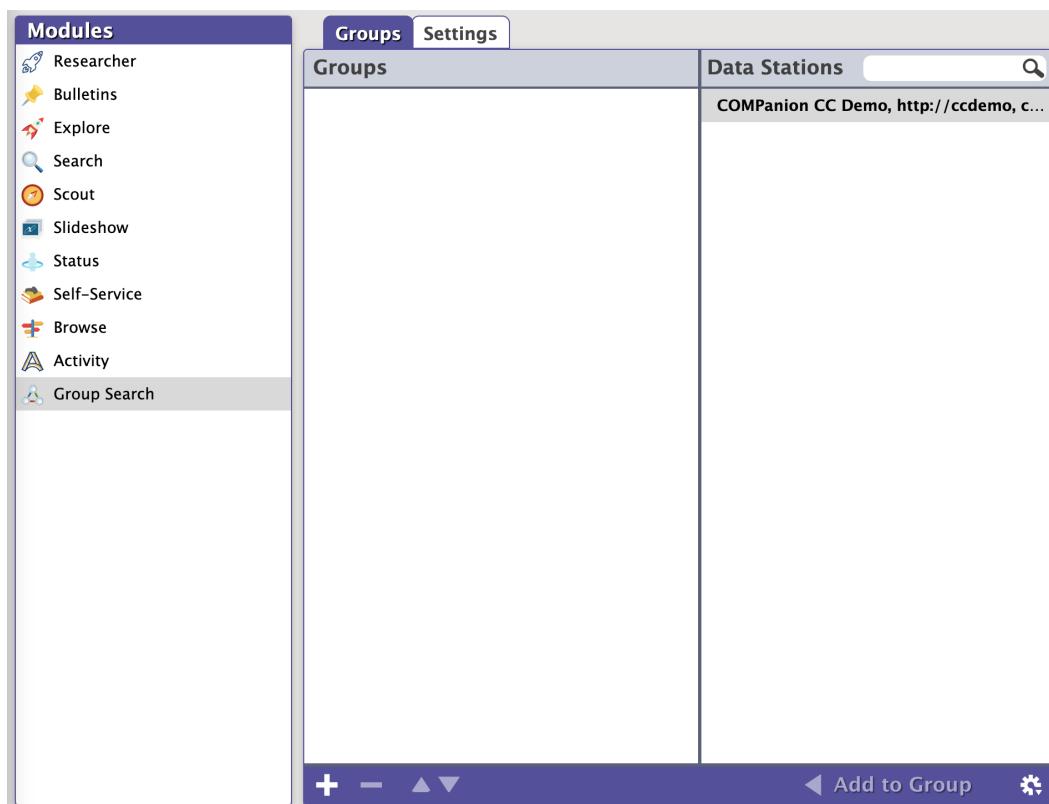
☒ Show Link to Amazon.com

- **Enable Full Details.** If enabled, clicking the title name (e.g. "The Catcher in the Rye") in Search Results allows you to view Full Details for the selected item. Additionally, checking this box enables or disables the remainder of the Full Details preference settings described below.
- **Show MARC Tag 000-009 Data.** This preference determines whether MARC tags 0-10 are shown in the Full Details dialog.
- **Show MARC Tag 900-999 Data.** This preference determines whether MARC tags 900-999 are shown in the Full Details dialog.
- **Show View Full MARC Record.** This preference determines whether the View Full MARC Record link appears in the bottom-left corner of the Full Details dialog. When the View Full MARC Record link is clicked, it will open a new browser tab containing a text-only version of the title record in MARC format.
- **Show Link to [Amazon.com](https://www.amazon.com).** This preference determines whether the link to [Amazon.com](https://www.amazon.com) appears in the bottom-right corner of the Full Details dialog. Clicking on the Amazon graphic link will open [Amazon.com](https://www.amazon.com) in a new browser tab with the closest possible match based on the item's ISBN/ISSN. Additionally, the Amazon link will not appear if the title record is lacking a valid ISBN/ISSN.

Groups

Group Search preferences are used for Distributed Catalogs to create search groups that store Alexandria Data Station DNS or IP addresses. Once properly configured, you can search these addresses from the Group Search interface. You may add as many search groups as you need to manage your Alexandria libraries and/or collections.

Generally, most create an individual search group for each supplementary site. However, additional search groups may be created instead for more extensive searches. For example, you can create custom search groups that contain Data Stations according to geographical regions (e.g. Northwest Quadrant) or levels (i.e. Elementary Schools) in a school district.



The left-hand side of the Group Search preferences contains the Groups list, where all your search groups are displayed in the order which they were created. The Data Stations list is essentially a collection of remote Alexandria Data Stations that you can Add or Remove. The area situated below the Groups and Data Stations lists contains tools that useful for adding, removing, rearranging, or testing both search groups and Data Stations.

Groups List Tools

+ Add Search Group

Add a new search group to the Groups pane. These can later be accessed in the Researcher's Group Search interface (/groupsearch). Keep in mind that Group Names must be unique.

— Remove Search Group

Remove an existing search group and all of the associated Data Stations. Be absolutely positive that you want to remove the group before clicking Remove; it cannot be undone.

▲▼ Move Up/Down

These controls organize how Data Stations are arranged in a group, which affects the order in which they are searched by the Group Search interface (/groupsearch) when their principal search group is selected. New Data Stations are always added to the bottom of the selected groups list.

◀ Add to Group

Copy a Data Station and add it to the selected search group in the Groups pane.

Actions Menu

The  Actions dropdown menu at the bottom of the Data Stations list contains tools that useful for adding, removing, or testing remote Alexandria Data Stations.

Add Data Station

Add a new Alexandria Data Station. Each Data Station acts as its own local server with an individual site name and access URL (i.e. DNS or IP address). Enter the DNS or IP address of the remote Data Station you would like to add. Each Data Station requires an authentication code to connect.



The browser protocol—such as **https://**—must be included in the access URL if it's required by the host (this applies to all Cloud-Hosted users).

Edit Data Station

Edit an existing Data Station from the Data Stations list.

Remove Data Station

Remove the currently selected Data Station from the Data Stations list.

Test Selected Data Station

This verifies that you can establish a connection with the selected server and then refreshes and updates the remote Data Station's information.

Settings

The screenshot shows the 'Settings' tab for the 'Group Search' module. On the left is a 'Modules' sidebar with icons and labels for Researcher, Bulletins, Explore, Search, Scout, Slideshow, Status, Self-Service, Browse, Activity, and Group Search (which is highlighted). The main content area has tabs for 'Groups' and 'Settings', with 'Settings' being the active tab. Below the tabs, a text line states: 'The Settings tab contains various preferences that affect the Group Search module.' There are three main sections: 1. A checkbox labeled 'Require Login to Access Group Search' which is currently unchecked. 2. A 'Style' dropdown menu currently set to 'Professional'. 3. A 'Local Server' section containing three fields: 'Library Name' (COMPAnion CC Demo), 'Access URL' (https://ccdemo, cudemo.goalexandria.com:443), and 'Authentication Code' (an empty text box).

Settings

- **Require Login to Access Group Search.** When checked, access to the Researcher's **Group Search** interface (/groupsearch) requires a valid **Username** and **Password**.

Styles

- **Styles.** This drop down menu allows you to change how Alexandria looks. To learn more, go to [Styles](#)

Local Server

- **Library Name.** This non-editable field is pulled from your registration information.
- **Access URL.** This non-editable field is pulled from the local site's DNS (domain name) or IP address.
- **Authentication Code.** You must provide an authentication code here in order for other Alexandria users to connect to your Alexandria database; if left blank, outside databases will be unable to connect.

Auto-Hide

Auto-Hide

Auto-Hide preferences allow you to hide titles that do not have any physical copies in circulation from your **Explore**, **Scout**, **Search**, and **Slideshow** results. Electronic resources will not be hidden. This can be helpful when adding title record information in advance of incoming copies.

The screenshot shows the 'Auto-Hide' preference window for 'Adams Middle School'. On the left is a 'Modules' sidebar with options: Researcher, Bulletins, Explore, Search, Scout, Slideshow, Status, Self-Service, Browse, Activity, and Group Search. The 'Researcher' module is selected. The main panel has two tabs: 'Researcher' and 'Auto-Hide', with 'Auto-Hide' being the active tab. The 'Auto-Hide' tab contains the following text: 'This preference allows you to automatically hide Titles with no copies that are not electronic resources from your Explore, Mobile, Search, Scout, Slideshow, and Browse Results. This may be convenient when adding title record information in advance of incoming copies. In addition, automatically hide Titles when all the copies for a Title are a combination of the selected statuses. In other words, Auto-Hide settings allow you to hide Titles when there are no copies in circulation.' Below this text is a checkbox labeled 'Enable Auto-Hide' with the subtext 'This will automatically hide titles that have zero copies and are not electronic resources.' Underneath is a section titled 'Also Hide Title When All Copies Are Some Combination of...' followed by a 3x3 grid of checkboxes for various statuses: Lost, On Repair, In Processing, Discarded, On Order, Unknown, Library Use, Archived, and In Transit.

Here are a few things you should know before you enable this preference:

- Titles will only be hidden if *all* copies are checked out to a system patron you've chosen to hide from search results, but they do not have to be checked out to the *same* system patron. For example:
 - *The title in question has four copies, all of which are checked out to a system patron: two are Lost, one is In Processing, and one is On Repair.*
 - *The title will be hidden if you've opted to hide Lost, In Processing, and On Repair items.*
 - *The title will be shown if you've opted to hide Lost and On Repair but not In Processing.*
- If the status of a previously hidden copy is updated to Available or it's checked out to a system patron that you have *not* opted to hide, the title will be included in search results again.
- Title records that have the **Don't Show in Researcher** setting checked are hidden from search results, regardless of their status and your Auto-Hide selections.

Enable Auto-Hide

Check this box to automatically hide titles that have zero copies and are not electronic resources. You must check this box to enable any sort of auto-hide, including the "Also Hide Title..." options below.

Also Hide Title When All Copies Are Some Combination of...

These options allow you to mix and match which titles to automatically hide from your search results.

- **Lost**
- **Discarded**
- **Library Use**
- **On Repair**
- **On Order**
- **Archived**
- **In Processing**
- **Unknown**