

# Sites



The sites you are licensed for show up automatically; there is no need to add or remove sites manually. Please [contact our Sales Team](#) if you would like to add additional sites.

*When a database has more sites than is allowed by the current registration, the excess sites will be hidden from the Site Picker displayed at login.*

Sites Management is where you configure your single site or each of the sites in your Centralized Catalog. Only operators with District or Library Administrator security levels can configure site information; however, any operator with the appropriate Security Group and Site Access settings can select the site in the dropdown menus found in Patrons Management, Textbooks Management, and other places within the program. Valid and available sites are always pulled from here.

It's important that you add site information such as a site contact and email so that patrons can receive relevant email notices.

## Site Record List



### What is the difference between a **Union Site Record** and a **Site Code?** (Centralized Catalog)

If you manage multiple collections in a Centralized Catalog environment, a site Code is embedded in Patron and Item records to allow an operator to quickly differentiate data belonging to one collection over another. All Centralized Catalogs have a Union Site Record within the list of Site Codes when logging into Alexandria or Textbook Tracker as administrator.

A Union Site Record is a special purpose site that does not operate like a normal site. Any items assigned to it may only be checked out by System Patrons (Barcodes 1-100). It is used by Alexandria and Textbook Tracker in two ways:

1. As a place to assign Patron or Items records that do not have a designated site.
2. Defining Preference default settings; when a new site is created the Preference settings from the Union Site are copied to the new site.

The site at the top of the Site Records List is your union site record. If you have a single site license, this will be your only site record.



**Search.** If you have a lot of sites to sort through, you can search for specific site codes.

## Toolbar



**Lock/Unlock.** Click the padlock to unlock the record for editing.



#### Actions.

- **Site Record Counts.** This report runs a quick list of all of your sites with some basic record numbers. Note that this report does NOT run through Operations and it does NOT generate a pdf. The report opens in a new html tab with html output.
- **Refresh registration.** Click here to refresh your licenses/registration. If any sites are incorrectly registered, you will need to Re-Register site before refreshing your license.
- **Re-register site.** Update registration information for any incorrectly registered site.
- **Remove site.** Permanently delete the selected site.
- **Site Identifiers.** This option is only used by Alexandria customer support.

## Current Site Record

### Site Name

Site names are determined by your registration and cannot be changed manually. Please contact the COMPanion Sales department at (800) -347-6439 if you need to change your site names.

### Site Code

This is used to tag various record types, including Patrons and Items. Other areas affected by the Site ID Code include Orders, Budgets, Vendors, Subscriptions, Routes, Maps, and Bulletins.

Site ID Codes are used in several ways:

- To identify the collection for which a copy belongs.
- To identify the site for which a patron belongs.
- To determine whether a book-dropped copy was returned to the correct location or if it needs to be placed in transit and returned to the owning library.
- To determine copy availability at particular locations when placing holds and reservations.
- To filter a patron's Researcher search results to display only a particular collection (or group of collections) for which they are interested.

The Site ID Code cannot use any special characters.

### Site Notice

Any text you enter in this field will be displayed when you click on the Site Information link in your Alexandria Researcher and the topnav Site Info in Librarian. Describe your library hours (e.g. 9:00 a.m. - 6:00 p.m. Monday through Friday) with any combination of numbers and hours. Other information like special hours or holidays can also be included. If you decide to leave this field blank, the text "Library Hours Not Specified" will appear in the Site Information section of Researcher.

### Site Information

- **Site Contact.** Enter the name of the current site's administrator or head librarian here. This name will be added to the bottom of form letters.
- **Contact Title.** The site administrator's title. For example, *Librarian*, *Director of Media*, *Library Specialist*, or *Teacher*. This title can also be included on form letters.
- **Email.** This is the site's email address, which is used as the return mail address for overdue notices and other email messages sent by Alexandria. To guarantee that your email notifications are being sent, please check the list of requirements located under your Email settings. You must enter a valid email address to use most email services, including COMPanion's Customer Support services.
- **Phone / Fax.** Provide the telephone number for the site's main desk or office. If applicable, enter the site's fax number.
- **Address.** Enter the site address, city, state, postal code, and country for the library. This data is used for return addresses on patron notices, for information shown on the Researcher Workstation, and is included in emails sent to COMPanion's Customer Support team. It is also used as the default information when creating a new patron who doesn't have city, state, postal code, or country information specified.
- **Site Record Notes.** An optional notes field where you can provide any supplementary information about your managed sites.