

# Builder

## Researcher

### Builder

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Unknown macro: 'rate'

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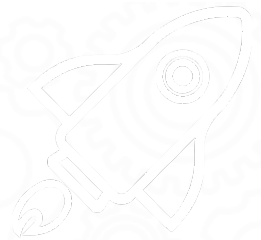
Alexandria

- Blog: [Searching by Subject](#) created by [Bethany Brown](#)

Nov 16, 2022

Alexandria

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This information has all been moved to <https://support.goalexandria.com/builder/>


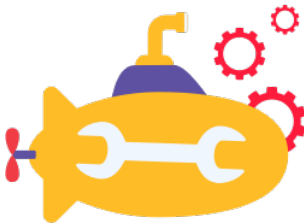




The new hub for all our Researcher builders—bulletin boards, explore builder, maps, and reviews.

## Content

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## Builders

 <b>Bulletin Boards</b>	 <b>Explore Builder</b>	 <b>Maps</b>	 <b>Reviews</b>
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**Display**

# Builder

Select custom Explore Panes and styles that will be used in different areas of Researcher by using the different menus seen below.

Display

Searching

Security

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Auto-hide

Group Search

Kiosks

Builders

Bulletin Boards

Explore Builder

Maps

Reviews

Display Defaults

Default Style  

Classic

Default Explore Pane  

(none)

Override Styles

Set individual styles for different areas of Researcher, or simply use the default.

Researcher Hub  

Professional

Activity  

Professional

Slideshow  

Professional

Patron Status  

Professional

Self-Service  

Professional

Bulletins  

Ocean

Search  

Professional

Explore  

Professional

Browse  

Professional

Scout  

Ocean

Clear Overrides

Explore Panes

Choose which Explore Panes show up where; Customize Explore Panes using [Explore Builder](#).

Researcher Hub  

AMS Researcher

Search (top)  

AMS Top Pane

Search (bottom)  

AMS Bottom Pane

Explore Start  

Alexandria Explore

Branding

Preview your logo against Researcher's background, swap it out for a new one, or remove it to use the default logo. You can even have it link to another site.

Alexandria  
Researcher

- +

.png; >250K file size; 50-100 pixel height recommended

Logo Link

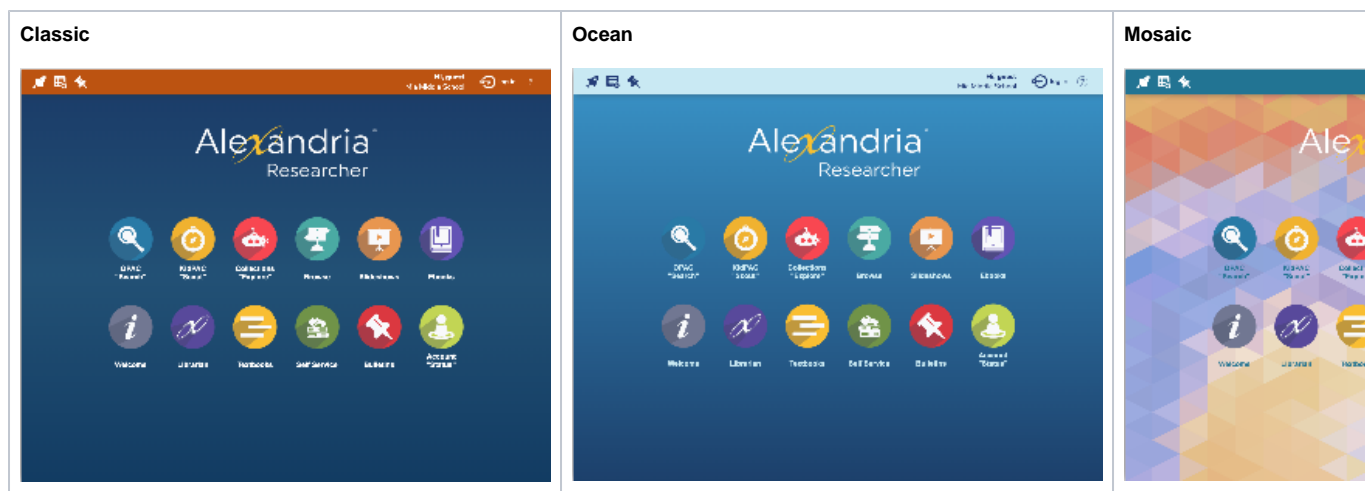


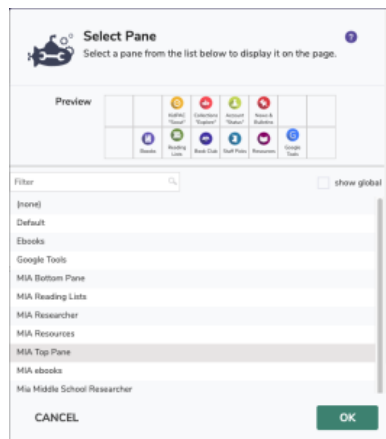
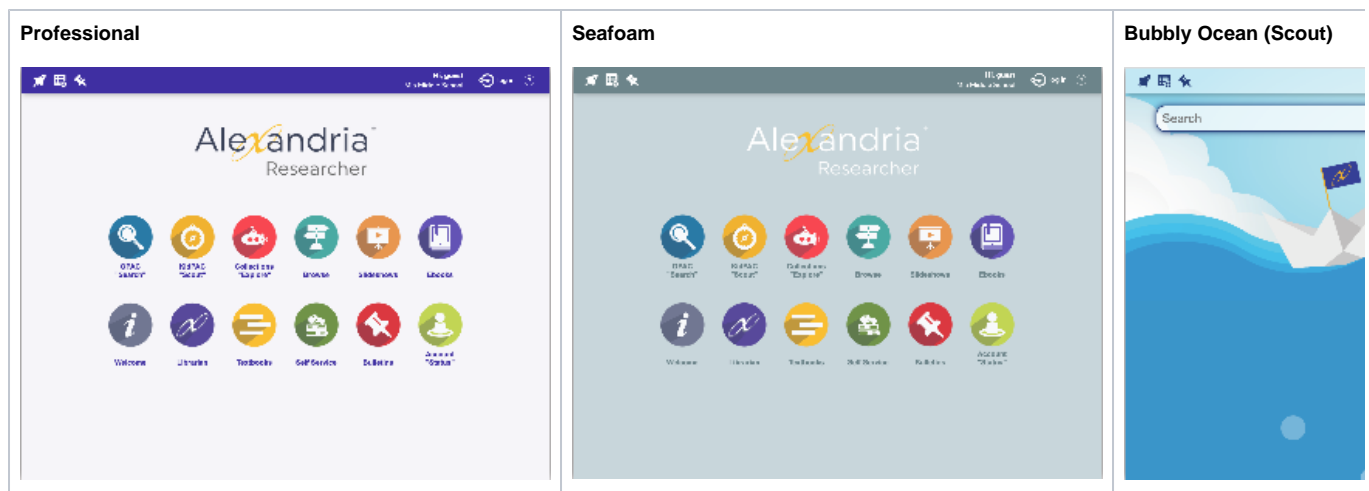
If you are in a centralized catalog you can now save site-specific Builder preferences across all of your sites at once using the new **Save To All Sites** button.

## Display Defaults/ Override Styles

Select a Default Style (color scheme) to unify your patron interfaces, or pick a different style for each part of Researcher.

**NEW!** All styles now available for Scout!





**Explore Panes**

Choose which Explore Panes show up where; Customize Explore Panes using [Explore Builder](#).

Researcher Hub	Search (top)	Search (bottom)
MIA Researcher	MIA Top Pane	MIA Bottom Pane
Explore Start		
Alexandria Explore		

## Explore Panes

Choose which Explore Panes show up for each area: Researcher Hub, Search (top), Search (bottom), and Explore Start. You can also set the (top/bottom) search panes to 'none' if you don't want them showing. Customize Explore Panes using [Explore Builder](#).

## Branding

You can set your logo to appear on the Researcher pane. Preview your logo against the Researcher Background you selected. Swap out the logo for a new one, and even link your logo to another site.

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## Search Controls

Edit your search controls, including managing what your patrons can do in different search interfaces.

## Search Controls

☒ Show Study Programs pre-search filter in Search

Initial Search Results Returned in Search and Explore...

☐ 25 ☒ 50 ☐ 100

Manage what your patrons can do in different search interfaces...

	<u>All</u>	<u>Search</u>	<u>Explore</u>	<u>Scout</u>
Place Holds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Place Reservations	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
View Maps	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Write Reviews	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Search Details

Determine which details you wish to show in search results...

	<u>All</u>	<u>Search</u>	<u>Explore</u>	<u>Scout</u>	<u>Browse</u>
Programs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Lexile	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Reading Level	<input type="checkbox"/>			<input type="checkbox"/>	
Title Availability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Unavailable Items	<input type="checkbox"/>			<input type="checkbox"/>	
Title	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	
Call Numbers	<input type="checkbox"/>			<input type="checkbox"/>	
Copyright Year	<input type="checkbox"/>			<input type="checkbox"/>	
Series	<input type="checkbox"/>			<input type="checkbox"/>	
Copy Location	<input type="checkbox"/>			<input type="checkbox"/>	
Enable Item Details	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
MARC 000-009	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
MARC 900-999	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
MARC Record Link	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Amazon.com Link	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

- **Show Study Program pre-search filter in Search.** Check to enable the Study Program filter.

- **Initial Search Results Returned in Search and Explore.** Check to enable 25, 50, or 100 search results.
- **Place Holds.** 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.
- **Place Reservations.** 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.
- **View Maps.** 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.
- **Write Reviews.** When checked, patrons are allowed to review items in your collection by clicking the star rating in the item result details. When this preferences is not checked, the rating stars disappear—as does the ability to review items.

## Search Details

- **Programs.** Choose whether your preferred Study Program information will appear in brief and/or expanded search results. The study program shown is determined by Default Program setting, located further down the page.
- **Lexile.** Have your Lexile Score show or not show in your brief and/or expanded search results.
- **Reading Level.** Check to display the reading level of the items in search results.
- **Title Availability.** When checked, this preference will show whether or not the items returned in a Search are available to be checked out.
- **Unavailable Items.** When this is checked, Unavailable items will show up in search results.
- **Title.** Check to display the title in Search results
- **Call Numbers.** Enable call numbers to display with results. In Scout, Call Numbers will show in details either way; this controls whether Call Number shows with the title.
- **Copyright Year.** Include copyright year with results.
- **Series.** When checked, items will display any series information in search results.
- **Copy Location.** Enable copy location to show in Item details in Scout.
- **Enable Item 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.** Show the link to [Amazon.com](https://www.amazon.com) 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.

### Default Program

Select which program you want to highlight in search results.

Default Program

None

### Override Program

Set individual programs to highlight in different areas of Researcher, or simply use the default.

Search

None

Explore

None

Browse

None

Scout

Accelerated Reader

[Clear Overrides](#)

## Default Program

Choose which program you want to highlight in search results.

## Override Program

Set individual programs to highlight in different areas of Researcher, or simply use the default.

## Log Search Queries

Check 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](#).

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**Security**

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### Access

Require patrons to log in to access...

☐ Bulletins
☐ Group Search
☐ Scout
☐ Browse
☐ Search
☐ Explore

### Timeout

Screens will timeout after the selected amount of inactive time, which will log out users and clear searches.

15 Minutes

## Access

Choose which areas of Researcher require patrons to log in. Only turn these on if you don't want your collection open to the public.

## Timeout

Screens will timeout after the selected amount of inactive time, which logs out users and clears searches.

Timeouts will only occur when you've logged directly into Researcher- when you open Researcher from Alexandria Librarian, it will not time out.

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## Slideshow

Slideshow gives you a fun way to dynamically display any list of titles in your catalog for educational or promotional purposes. You can limit the Slideshow to display on a television or projector that does *not* allow user input or to a dedicated display that *does* allow user input—such as a tablet device on a display table. By saving the URL generated by editing the settings, an unlimited number of Slideshows can be created.

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### Default Slideshow

The Slideshow interface displays items using a search string, predefined search, or saved list. [Learn how to format a general search string.](#)

You can create an unlimited number of slideshows! Simply fill out all of the information below and copy the Slideshow URL when you're done. Ready to make another? Just make any necessary changes and copy the new Slideshow URL. Remember to save all of your URLs somewhere. These are great for Explore Panes! (Hint: Click Revert to restore your current default slideshow.)

Slideshow Name

Books for Dragons

Select a source for your slideshow.

☐ Search String 

((savedlist:B87A40B4354F4F1D802386A616EB06A9))

☐ Predefined Search 

Highest Rated Titles

☒ Saved List 

COMPanion Reading List

Layout

Preview

Speed

5 Seconds

Transition

None

Slideshow URL

https://ccdemo.goalexandria.com/slideshow?site=AMS&search=((savedlist:B87A40B4354F4F1D802386A616EB06A9))

Copy URL

View

## Slideshow Name

Enter the name of your slideshow here. The name will be shown at the top of the slideshow.

## Search

This field determines what items are displayed in Slideshow. Enter a search string ((smart::harry potter)) to perform a relevancy-based Smart Search. You can even paste a Search URL in this field, and Slideshow will search for and extract the search string. The possibilities are endless!

Read [Search Strings](#) for more information on using search strings and building syntax.

## Predefined Searches

Click to select and apply some of our commonly-used search strings without having to understand the syntax. Recently Added Titles, Highest Rated Titles, and Titles With Awards are just a few of your available options.

## Saved List

You can also choose from one of your public saved lists.



Slideshows will only display the first 100 items in the search results or saved list.

## Layout

Choose between a Split or Preview layout. If you open a slideshow on a mobile phone, it will default to the mobile layout.

- **Split.** The current slide displays cover art on the left and item details on the right. Click the arrow on the left to go back a slide, and click the arrow on the right to move to the next slide.
- **Preview.** A carousel containing the items in your list is displayed below the current slide.
- **Mobile.** The current slide displays item details only, and a carousel containing cover art for other items in your list is displayed below.

## Speed

Set the duration of the slide interval in seconds. The default is 5 seconds, but it can go as high as 60 seconds.

## Transition

Choose the type of transition: Drawer, Fade, Ken Burns, or Push.

## Slideshow URL

Copy the slideshow URL to use in Explore Panes, your library website, and more.

## View

Preview the slideshow interface in a new browser tab to make sure it's working as expected.



Want to add a custom Slideshow to Explore? Read [Custom Slideshow URLs](#) to learn how!

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## Auto-hide

Auto-Hide allows 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, as opposed to using Item Policy settings to hide equipment and resources that are assigned to patrons rather than selected by them.



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 in its assigned Item Policy are hidden from search results, regardless of their status and your Auto-Hide selections.

## Enable Auto-Hide

Toggle 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.

## Auto-Hide by Status

These options allow you to automatically hide titles with all of their copies checked out to any combination of System Patrons (status) that you have checked off.

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

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## Group Search

Group Search is 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 screenshot displays the 'Local Server' and 'Group Search' configuration panels. The 'Local Server' panel includes fields for 'COMpanion CC Demo', 'Access Url: https://ccdemo, cudemo.goalexandria.com:443', and a 'Display Style' dropdown set to 'Professional'. An 'Authentication Code' field is also present. The 'Group Search' panel features a 'Filter Servers' search bar and a list of servers. The 'Servers' list contains one entry: 'COMpanion CC Demo' with the URL 'http://ccdemo.'. At the bottom of the 'Servers' list, there is an 'ADD TO GROUP' button and a settings icon.

## 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.

## Group Search

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.


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## Kiosks


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Activity

Record activity in your library

Activity 1

Visit

Activity 2

Event

Activity 3

Classroom Project

Activity 4

Book Club

## Activity

**Activity** is an unattended kiosk interface that allows you to keep count of patron visits, volunteers, and event attendees. Information gathered from Activity can be presented to administrators or funding sources for planning and budgeting purposes.

<b>Activity 1</b>	Defaults to "Visit." Shows on top left button.
<b>Activity 2</b>	Defaults to "Event." Shows on top right button.
<b>Activity 3</b>	Defaults to "Classroom Project." Shows on bottom left button.
<b>Activity 4</b>	Defaults to "Book Club." Shows on bottom right button.



In Activity, the activity text will truncate with an ellipsis ("...") if it is too long for the button.

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