



GETTING STARTED GUIDE FOR LIBRARIANS



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Please carefully read this Getting Started Guide before setup or use of the Alexandria system. If you still have questions after reading these instructions, please contact Customer Support at support@companioncorp.com or call (800)-347-4942.

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WELCOME TO ALEXANDRIA

Alexandria has been automating public, private, school, and church libraries around the world for over 30 years. Welcome to our family of happy users!

Alexandria is a comprehensive library automation software system designed to efficiently manage your assets, textbooks, electronic resources, and patron information—freeing librarians and technology specialists to deal with more important tasks.



The **Alexandria Librarian** interface is where you check items in and out, run reports, perform utilities, access administrative tools, and change your preferences and policies.



Alexandria Researcher empowers your patrons with a suite of visually-engaging search interfaces they can use to discover and access your resources.

See our [Getting Started](#) page for a guided orientation through Alexandria and our Support Center.

If you are self-hosted, see our [Self-Hosted Guide for Admins](#) to learn about **Administration** settings. Please note that these are advanced, high-level settings used to configure the data station (i.e. server). It is a guide intended for network administrators, information technology support departments, or operators who have been assigned the task of overseeing your system.

When Alexandria is cloud-hosted, you save time and resources. We perform daily archives and backups of your data from our advanced data centers as well as handle all updates and upgrades. [Learn more](#) and let your IT department/admin know how they can benefit from our hosting.

See the [Textbook Tracker Getting Started Guide](#) for Textbook Tracker.

COMPANION SOFTWARE SUBSCRIPTION INCLUDES:

- Upgrades to more advanced, future versions at no extra charge
- Customer support—24 hours a day, 7 days a week (Calls are 24/7; emails are answered in 1-2 business days.)
- Online resources, including our Support Center, training videos, and webinars.



ALEXANDRIA SETUP CHECKLIST

- Barcode Your Collection.** Read about best practices when it comes to barcoding your collection.
- Back Up Your Data & Archive Your Data.** Create copies of your Alexandria database.
- Scanner and Printer Installation/User Guides.** Figure out how to set up and use library hardware.
- Why You Need Policies.** Establish rules that regulate how library resources are used by your patrons.
- Import Patrons and Items.** Add multiple records at once for your patrons and library items.
- Configure Your Preferences.** Customize Alexandria to fit your library's needs.
- Security Best Practices.** Determine program permissions and access for librarians and patrons.
- Email Notices.** Set up email notifications for your patrons and librarians.



1 Registration

Cloud Hosted

Registration is automatic. Just follow the URL we provide, log in or create an account, and begin managing your library immediately. COMPanion will email you the URL required to access Alexandria.

Self Hosted

Registration is largely automatic. See our [Self-Hosted Guide for Admins](#) for more information. Your data station just needs to connect to COMPanion servers in order to validate.

Logging In

If you're brand new to Alexandria, you'll be prompted to create a District Administrator account the first time you access the program. However, if you're coming from a previous version of Alexandria, you can log in with your old account.



If you've licensed [Lexiles](#), [SIP2](#), [Z39.50 Server](#), [Advanced Bookings](#), or any of our vendors or search extras, most will be automatically activated, but you'll need to turn some on/ configure settings in your preferences.

2 Accessing Alexandria

Alexandria interfaces are cross-platform and accessible on both Macintosh and Windows operating systems via HTML5-compliant web browsers such as Chrome, Firefox, Safari, and Edge. They're also accessible on mobile devices, laptops, and tablets, such as Apple's iPad, Google's Chromebook, and others.

See our most current list of [Alexandria Requirements](#) in the Support Center.

Alexandria Interfaces

You can access various Alexandria interfaces by appending a slash and the interface's name to the end of your data station's (DNS or IP) address (e.g. <http://yourlibrary.goalexandria.com/interface>, referred to throughout this guide as your Alexandria URL). Access **Librarian**, Alexandria's primary management interface, by appending **/librarian** or **/circulation** to the end of your data station's address.

Learn about Alexandria's basic interfaces in the [Orientation and Set Up](#) section of this guide and explore more by checking out our [Support Center](#).

Operators attempting to access certain interfaces must have the proper Security Group permissions. You may also need to change the default ports or configure the server domain names that Alexandria uses. Read more about configuring your general web access settings in our [Self-Hosted Guide for Admins](#).

Additional Information for Self Hosting

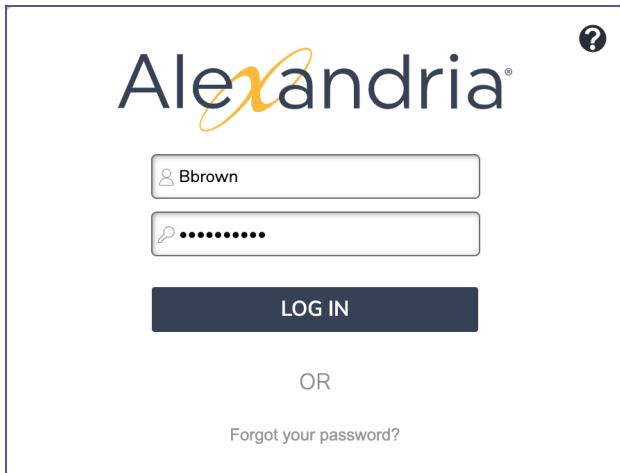
If you're running a Distributed Catalog under an Alexandria Controller, you may need to follow your port number with a valid data station serial number to access a single site:
<http://123.456.78.910:80/1234567/librarian>.

Access to individual sites can be enabled by using the Show Available Data Stations List or by setting up Server Domain Names for each data station using the [IT Controller's Administration settings](#). To access the Controller's "/admin" interface, forego the site-specific serial number: <http://123.456.78.910:80/admin>

Bookmarking Interfaces

For convenience, you can bookmark any interface or add it to your browser's list of favorites. You can also create a shortcut to any interface from your operating system's desktop. To do this, open the interface, highlight the URL in the address field (or "favicon") and drag it to your desktop to create a link.

3 Logging In



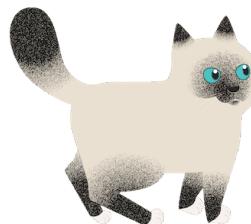
In order to prevent unauthorized access and protect your private information, a valid username and password are required to access the **Librarian** interface.

After logging in, the name and site of the current operator is shown at the top right of the **Circulation** window.



Future access to Alexandria requires each operator to have an account and belong to the appropriate Security Group. Keep in mind that you will want different operators to have permission to access certain interfaces or perform a range of tasks.

In a multi-site Centralized Catalog, you will need to select a site after logging in. If you don't yet have sites other than the [Union Site](#), review the Sites Management section on page 7 and 8 to find out how and where to create them.



ORIENTATION AND SET UP

The Alexandria Librarian Interface

After logging in, you'll arrive at the **Dashboard** window. One of the first things you'll notice is the navigation sidebar (sidenav) on the left-hand side of the window. Each icon in the sidenav is a shortcut to one area of Alexandria's Librarian: **Dashboard**, **Circulation**, **Items Management**, **Patrons Management**, **Operations Management**, **Tools**, **Builder**, and **Preferences**.

Librarian Areas



DASHBOARD

Dashboard is the landing page after you log in. It gives you statistics about your Alexandria, and important messages from us.



CIRCULATION

Circulation is used to perform general library actions such as issuing books, placing hold requests/reservations, processing fees/fines/payments, and renewing books. You may also perform special functions such as inventory, cataloging, and record maintenance.



ITEMS MANAGEMENT

Items Management is where you manage information about every asset in your collection. This is also where you examine, add, modify, or remove all title and/or copy records that circulate in your library (books, electronics, periodicals, eBooks, etc.).



PATRONS MANAGEMENT

Patrons Management is where you create, view, modify, and remove information about the patrons and operators who are part of your site—including their security permissions.



OPERATIONS MANAGEMENT

Operations Management contains **Reports**, **Labels**, **Notices**, **Utilities**, **Export**, and **Import**, and lets you view, email, or download information on recently run operations.



TOOLS

Tools contains convenient shortcuts to program and management tools, including **Inventory**, **Authority Control**, and **Security Groups** settings.



BUILDER

Builder is your hub for customizing **Researcher** for your patrons (learn more about Researcher on page 10). Decide how your online catalog looks, what your patrons can do, and how your patrons access it.



PREFERENCES

Preferences contains various global settings that you can customize to make Alexandria fit your library's needs (receipts, terminology, circulation alerts, and more).



As a shortcut to one of the above interfaces, append the end of your Alexandria URL with, for example,: "/circulation", "/items", "/patrons", "/operations", "/tools", or "/preferences".

Use our **Offline Mode** tool to continue working when things go wrong, such as a network failure. If your server connection is lost, Alexandria will prompt you to work in Offline Mode. You can also access the interface while you're still online via Tools or by adding **/offline** to the end of your Alexandria URL.

1 Setting Up Alexandria

As you explore Alexandria, you will grow more comfortable with the standardized layout of the management windows and the location of important settings and features. You may notice a round Help icon  in the upper-right corner. Clicking this gives you help options including a link to a related section of the online **Support Center**.

After accessing **Librarian** and familiarizing yourself with the interface, we suggest you configure your site information before going any further. Although most of your Union Site information may have been provided for you, you'll want to verify that the information is accurate. If you are a Centralized Catalog user, now is the perfect time to configure additional sites.

Don't forget to provide a valid email in **Sites Management**. This is crucial to ensure your emails make it to their destination.

2 Sites Management - Centralized Catalog

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. In a Centralized Catalog, you manage multiple collections, and we provide you with a Union Site. The Union Site should not be regarded as an actual, physical location. Instead, think of it as the "parent" to which all your other site collections belong.

To access **Sites Management**, go to **Tools > Sites** or append "/sites" to the end of your Alexandria URL.

This is where you'll add an email address used to send notices from Alexandria. You can also customize site information that displays in Researcher for patrons (library hours, holidays, etc).



See the **Support Center** to learn how to edit site records using **Sites Management**.

Alexandria's **Preferences** is where you'll customize Alexandria to fit your library's particular needs.

The checklist below is meant to serve as a quick reference to get you started. Visit our [Alexandria Support Center](#) to get more comprehensive information on each preference. You can also [schedule a training](#) to learn more about preferences and get help setting them up.

To access Alexandria's **Preferences**, select **Preferences** from the side navigation. Alternatively, append "/preferences" to the end of your Alexandria URL.

Configure Tools and Preferences

We recommend that you configure your **Tools** and **Preferences** in the following order:

Tools

SECURITY



Security Preferences are used to create and manage patron access levels by manipulating lists of permissions. A patron's security level determines what actions they are allowed to perform and what areas of the program they have access to. In other words, operators are denoted by Security Group and not a special patron type.

CALENDARS



Calendars Preferences are used to schedule library open days, closed days, period due dates, and more. Combined with **Policies**, **Calendars** are used to accurately perform circulation-based calculations: assigning due dates, calculating fines, and managing holds, among other things.

POLICIES



Your **Policies** establish how library materials are used by patrons. This includes how they circulate, how long they may be checked out, overdue fine rates, whether an item can leave the building, how circulation periods are computed, and so forth. Policies are an essential part of successful circulation, reporting, and statistics.

Preferences

SETUP



Setup Preferences allow you to configure your email, customize local terminology, set date and currency formats as well as time zone, determine how Alexandria reads patron and item barcodes, and more.

CIRCULATION



With **Circulation Preferences**, you can configure the level of interaction that operators have with the program, what additional content is displayed, information about patron Lexiles, messages that appear in the patron notices sent from your library, receipts, and the general circulation settings for holds, reservations, and charges.



PATRONS

Patrons Preferences are used to configure general settings for library patrons, such as default pictures, default barcode and policies, account expiration, and your grade table.



ITEMS

Items Preferences are used to configure general settings for everything that circulates, such as default item barcode ranges, default policies, temporary items, catalog settings, subject sources, and medium pictures.



As you set up your Alexandria preferences, keep an eye on the top right area of the screen; this will let you know if a preference area applies to just your SITE, or to your entire SYSTEM, and if the preference affects your Textbook Tracker setup.

4 Importing Patron and Item Information

After configuring your initial Alexandria settings and preferences, the next step is to import your patron and item information.



Most new users take advantage of our data conversion service. If we've already imported your patron and item information for you, you can skip this section.

Alexandria can import patron and item records, pictures, and transaction scripts. Alexandria can import item information from outside sources (such as book vendors) in industry-standard MARC, MicroLIF, or tab-delimited format.

Alexandria can import patron and operator data from any source capable of outputting text files in a tab-delimited format. With our FTP import functionality, Alexandria can import new (or update existing) patrons on a nightly basis. Check with your front/district office to find out if your patron data is stored in a machine-readable format. We also offer several **SIS integration** options that add and update patron records automatically; see page 11/ our Administrative add-ons.

To import patrons and items into Alexandria, append “/import” to the end of your Alexandria URL or go to **Operations > Import**.

Related Import Topics in Alexandria's Support Center

- [Import](#) Settings
- [Field Mapping](#) for patrons and items
- [Importing Patron Pictures](#)
- [Importing Transaction Scripts](#)



5 The Alexandria Researcher Suite

Researcher comes with a number of search interfaces that empower your patrons to locate their book on a map, place holds and reservations, create reading lists, write book reviews, renew loaned items, check fines, and more.

With the ability to access and search your library collection from anywhere in the world, patrons and staff can locate learning resources whenever they need—even after school—from any device.



Customize Researcher for your patrons in [Builder](#).

Researcher Interfaces

RESEARCHER HUB



The Researcher Hub is your Researcher's home page. From here, patrons can navigate to the links you customize in the Researcher Pane, including any area of Researcher or other websites. You can change up your Researcher Pane through [Explore Builder](#).

SEARCH



[Search](#) is a robust library search interface with advanced searching and filtering tools that help patrons locate materials based on Lexile, medium, series, reading levels, and more. With Search, you can locate resources, see availability, place holds, create reading lists, and even write reviews!

BROWSE



[Browse](#) is a kind of wander-through-the-bookstore search interface that displays results as book covers on digital shelves. You can find results by Newest, Highest Rated, Most Popular, Genre, or Study Program. This is ideal for patrons who don't have a specific title in mind while searching.

EXPLORE



[Explore](#) is an entirely customizable interface that uses pictures and icons to help patrons—who do not yet read proficiently—find what they need in your collection. Set up Explore using [Explore Builder](#), and download images for your buttons on our [Icons and Images](#) page.



SCOUT

[Scout](#) is a kid-friendly, intuitive “smart search” that returns the most likely candidates first, making the findings more relevant than those found using a pure keyword search.



STATUS

Status is each patron's portal to their personal library account. From here, they can view items out, holds, charges, and more! If security permissions allow, they can even edit their personal information, renew items, and pay charges online.



BULLETIN BOARDS

Bulletin Boards allow you to post messages that contain text, images, forms, links to reading lists, search results, or other outside URLs. Boards can even be scheduled to cover time-sensitive events at your library!



SELF SERVICE

Self-Service is an unattended kiosk interface that allows patrons to check items in or out themselves, freeing librarians to handle other library responsibilities.

ADD-ONS AND SERVICES

We offer a variety of integration products and services purchased from Alexandria and trusted third-party providers. These tools enrich your collection by providing content summaries, awards, reviews, recommendations, and more. Contact COMPanion to learn more.

Set up your add-ons and services in Preferences > Services.

Administrative



TEXTBOOK TRACKER

Textbook Tracker is a dedicated application for managing your textbooks. **Patrons**, **Administration** settings, and **Preferences** overlap with Alexandria **Librarian**.



SchoolDay

SchoolDay provides K-12 schools with EdTech tools, including secure data exchange between applications (such as your SIS). Use the single sign-on (SSO) in Alexandria with GG4L credentials.



CLEVER

Clever makes it easy to connect student information systems (SIS) with learning apps to ensure updated information everywhere. It's auto-rostered for district administrators.



ALEXANDRIA ENGAGEMENT+

Alexandria® Engagement+ enhances measurement of online student engagement by website, app, program, subject, and reading level.



CAMPUSKEY

Alexandria® CampusKey, powered by GG4L Passport, is a single sign-on (SSO) and identity management (IDM) platform that distributes EdTech applications to students and teachers.



SIP2

Utilize hardware that supports the **SIP2** protocol (e.g. Checkpoint, 3M, etc.). SIP2 enhances inventory and security, and empowers patrons with self-service check in/out.



ADVANCED BOOKINGS

Advanced Bookings is an extension to Alexandria's standard reservation capabilities which streamlines the management of centralized media centers.



Z39.50

The **Z39.50 Server** feature allows your data station to be used as a Z39.50 server so that remote systems can access and search your database.



ACTIVITY

Activity is a kiosk interface that allows you to keep count of who's coming to your library and why. You can download reports with Activity data for planning and budgeting.



GOOGLE SSO

Google SSO is available as a single-sign-on service. Google SSO is perfect for schools and districts already using Google.



GOALS

Goals allows librarians to create reading goals that students can sign on to. Patrons can track their goal progress in Researcher, and gain badges and gems for completing goals.

Cataloging



MITINET

Mitinet virtual cataloging offers efficient ways to analyze, enhance, and standardize your MARC data. Make your catalog more discoverable by adding tags, genrefying, and more!



SAFARI MONTAGE

SAFARI Montage provides internet streaming media for K-12 schools, facilitating learning in the classroom, and offers educators a single interface for visual resources.



LEXILE

Lexile matches a patron's reading skills to the difficulty of a text, which allows per-grade assignment of Lexile scores for patrons, and updates title Lexile scores via MetaMetrics.



BOUND TO STAY BOUND

Bound to Stay Bound provides an extra durable selection of the best children's books and media. When integrated with Alexandria, you can automatically import new BSB items into your collection.



MACKIN

Mackin allows you to automatically add MARC records for new Mackin purchases and export your data in MARC format to auto-upload to Mackin's website for review.



PERMA-BOUND

Perma-Bound integration allows you to export your data in MARC format and automatically upload it to Perma-Bound's website for review.

Searching



NAVIGATOR

Navigator is a NEW powerful technology that elevates your search base to the next level! Navigator optimizes the integration of various e-resources into one place.



SEARCH WIDGET

The **Search Widget** allows patrons to search your catalog directly from your library website. Depending on your needs, add a Simple or Advanced Search Widget.



SNEAK PEEK

Sneak Peek connects patrons to a wealth of information relating to all types of books, including title reviews, descriptive summaries, and cover art images.



NOVELIST

NoveList allows access to a reader-advisory service that enriches Alexandria's search results by offering related reading recommendations, similar authors, articles, and more.



TEACHINGBOOKS

TeachingBooks allows students and teachers to access supplementary material on your titles from your catalog.

eBook Integrations

Each of our eBook partners are designed to help your library utilize your subscription eBooks services. Depending on which services you use, Alexandria may share patron status information, retrieve MARC updates, show availability, support single sign-ing, and even assist in eBook acquisition.



OverDrive



MackinVIA



Boundless
(/Axis 360)



Gumdrop
Books



Capstone
Interactive



Capstone
Publishers

Hardware and Accessories

Our teams perform extensive testing on the hardware and accessories we sell, and we create our own guides to facilitate easy setups. Since we cannot guarantee that hardware purchased from 3rd parties will work with our programs, we recommend buying hardware that we have tested and approved here at COMPanion.

For more information on COMPanion-vetted hardware and accessories, visit our [online store](#). We offer barcode readers, printers, the finest photo-composed and laser-printed labels, and more—all designed to work seamlessly with our software. Please contact our expert Sales Department at (800) 347-6439 or by email at sales@companioncorp.com to ask about our hardware products or accessories.



SCANNERS

- Pre-configured to work with Alexandria
- Wireless scanners give you the freedom to roam while staying connected
- Advanced LED technology with bright, sharp aiming lines and high resolution imaging
- Read barcodes quickly and accurately without touching the label



RECEIPT PRINTERS

- Our high-quality printers are small, fast, and functional—designed for everyday use
- Clean, quiet thermal printing
- Durable and long-lasting



LABELS

- High-quality labels use a printing process that makes the barcode part of the label
- Standard labels are created with a process that simply places the ink on top of the label (we recommend label protectors for this option)
- Lamination and adhesives for these options increase durability



ADDITIONAL SUPPORT

Contact COMPanion's Sales or Customer Support departments via phone or email to learn more about Alexandria features. Our skilled and knowledgeable staff will be able to answer any technical or software-related questions you may have.

Contact Sales

Phone

Toll free: (800) 347-6439

Worldwide: 1 (801) 943-7277

Email

sales@companioncorp.com

Contact Customer Support

Phone

Toll free: (800) 347-4942

Worldwide: 1 (801) 943-7277

Email

support@companioncorp.com

Online Resources

Support Center

[Explore Alexandria](#)

[Tip of the Week](#)

[Textbook Tracker](#)

Add-ons and Extras

[Partner Files](#)

[Add-on Support](#)

Training and Videos

[Getting Started Resources](#)

[Alexandria Training Videos](#)



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Connect with us!

