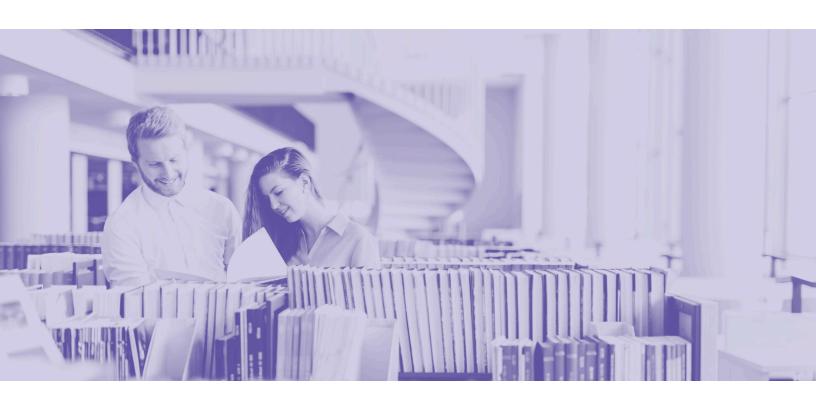
# Alexandria

## **BASIC TRAINING GUIDE**



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## INTRODUCTION

This Alexandria Basic Training Guide contains material that supports the Alexandria Basic Training Video Series. This guide is to be used as a reference tool to supplement the instruction provided by the Alexandria Training Coach and is not designed to provide further technical details.

The Alexandria Basic Training Guide communicates the basic understanding of Alexandria's primary functions, namely: Patrons, Items, Circulation, Operations, Tools, Preferences, and Researcher. Within each section, an overview of basic "how-to's" will be covered.

It is not the purpose of this document to act as a complete manual or to replace the current Support Center resources available to all Alexandria customers.

For your convenience, links to the Support Center have been provided throughout this training document. Simply click a link for more complete details on that particular topic.

## **HELP & SUPPORT**



#### Best Practices

#### Backup, Backup, Backup

**Self-Hosted** users will need to create their own data backups. A backup is a copy of your Archive folder that is saved to an external medium such as an external hard drive, flash drive, network file server, or a backup service on the cloud. **Learn more about backing up your data.** 



**Cloud-Hosted** service is the recommended method for all Alexandria users. By using our Cloud Hosted service you allow Alexandria to manage all of your data, updates, backups, and maintenance. Not only does this reduce the amount of expensive hardware and software your library will need to maintain servers, but it frees your time to focus on what you do best.

## Automatic Archives and Database Management

The major difference between a **backup** and an **archive** is that a backup is made from the archive data and placed on removable media that can be physically stored away from the library.

Alexandria automatically archives your data on a nightly basis. The archive can be used to restore lost data.

**Database Maintenance** occurs so the program verifies the integrity of your data and performs the actions necessary to follow the **Preferences** and **Policies** you have set.

## **Enable Security**

The Alexandria program comes with security already activated. Alexandria operators must be entered in the Patrons module and assigned to a Security Group that enables them to perform the functions within Alexandria that are necessary for the operation of the library. First, let's discuss setting the security group appropriately for your different types of operators.

#### To customize the permissions granted to a Security Group:

- 1. Click **Tools** from the Librarian sidenay, and click on **Security**.
- 2. Click on the **Security Group** you wish to customize.
- 3. Using the dropdown menus on all tabs, consider the options given and grant permissions as you wish for operators assigned to the chosen security group. The permissions listed in each dropdown menu are hierarchal, meaning the permissions listed above the selected permission will also be granted.
- 4. When finished, click on **Save** in the upper-right corner of the window.

#### To add an operator:

- 1. Click on the Patrons module from the Librarian sidenav.
- 2. Unlock Patrons Management by clicking the Lock icon . Click Add Patrons or the Add (+) button near the top right corner to add a new patron to your database. If the person is already in the system, search for the patron using the simple or advanced search.
- 3. Use the **Security Group** drop-down menu on the **Access** tab to select the appropriate security group. Click on **Save**.



## **Support Center**

Alexandria provides built-in Help documents. These can be accessed in either of two ways.

In the upper right corner of the **Librarian topnav**, you will see the **Help Menu** icon **②**. Clicking this icon will open the help menu, by clicking **Support Center** Alexandria will open the document associated with that window on the **Alexandria Support Center website**. The second method is to simply search for help documents in the Support Center.



## Message Center

Alexandria's Message Center allows you to receive notifications from COMPanion. These notifications contain update notices or information from COMPanion or COMPanion-sanctioned third parties and will vary depending on what features you are licensed to use. The Message Center comprises a single list, with COMPanion messages shown first.

#### To view the Message Center:

Click on the **Message Drawer** icon . The most recent message from COMPanion will be listed at the bottom of the drawer. To open the Message Center, click **Messages from COMPanion Corporation** to display a list of your notifications; when you have unread notifications or new messages are available, a red dot appears on the Message Drawer icon .



## Tip of the Week

Tip of the Week features a new tip for using Alexandria each week. The Tip of the Week archives are a collection of past tips that can help you run Alexandria more smoothly. Access the Tip of the Week archives from your **Dashboard**. You may also sign up to receive them via email so you never miss a tip!

Go to https://www.goalexandria.com/tipoftheweek and fill in the form to receive our weekly newsletter.



As long as your site's Alexandria Software Subscription is current, you have access to COMPanion's Customer Support Team anytime you have a problem or a question. You may call Customer Support 24/7 at (800) 347-4942 or send us an email during business hours at <a href="mailto:support@goalexandria.com">support@goalexandria.com</a>. (International: 1-801-943-7277).

During busy times of the year (beginning of school, beginning of the calendar year, and inventory season), you may be asked to leave a voice message. Customer Support will contact you as soon as they are available.

You can also email Customer Support directly from the **Help Menu ?**. Emailing from the program not only sends your message or question to Customer Support, but also informs them about your machine, its hardware, memory, your data, and the version of Alexandria you are running.

#### To email Customer Support:

- 1. Click on the **Help Menu** from the **Librarian topnav** and select **Contact Us**.
- 2. Type the subject and the desired message in the appropriate fields.
- 3. Indicate the preferred destination of the message from within the **Send to** dropdown menu.

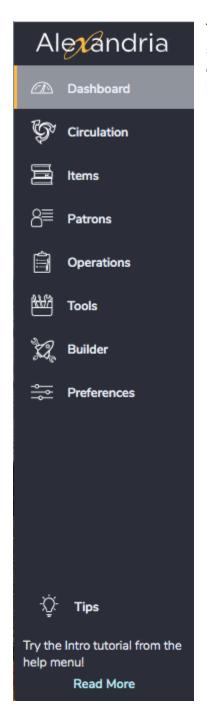
## **LIBRARIAN**

From Librarian, you can perform bookdrops and check-outs, run a selected range of reports, perform certain utilities, access tools (e.g. Inventory, Authority Control, and Policies), check Data Station reports (e.g. collection analysis and database statistics), and change your Data Station Preferences.



## Navigation

#### Sidenav



The **Librarian sidenav** is the long, vertical bar to the left of the program. Use the sidenav to navigate to the different areas of Alexandria. The sidenav can be collapsed and expanded by clicking on the Alexandria logo at the top. At the bottom of the sidenav, you will see some helpful tips.

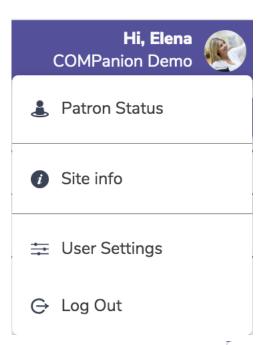


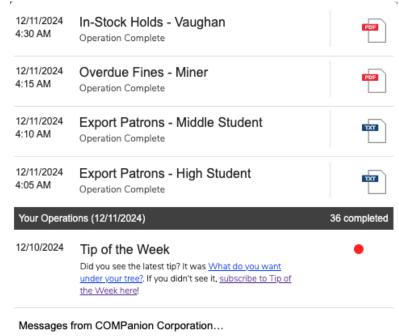


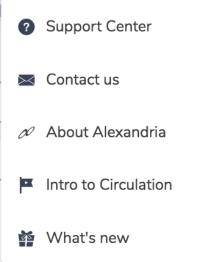




The **Librarian topnav** is the long, horizontal bar at the top of the program that is shown at all times. The topnav includes the user menu, message drawer, and help menu.







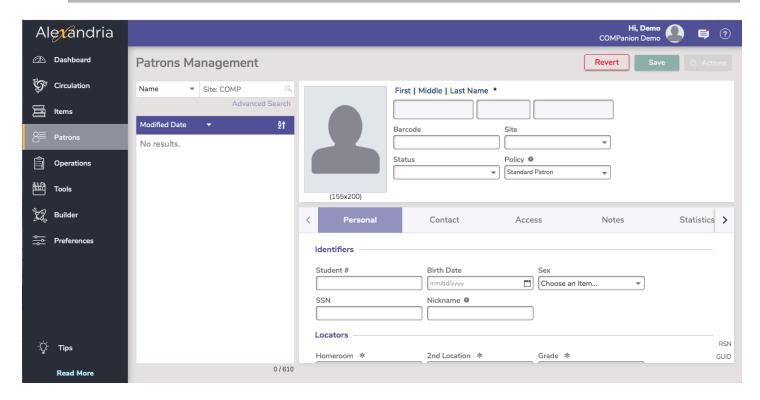
# 2 Dashboard

**Dashboard** is the first page you see after logging into your Alexandria Librarian. See some basic statistics for your site at the top of the dashboard and program icons to access the main areas of **Librarian**.



## **PATRONS**

## Adding Patrons Manually



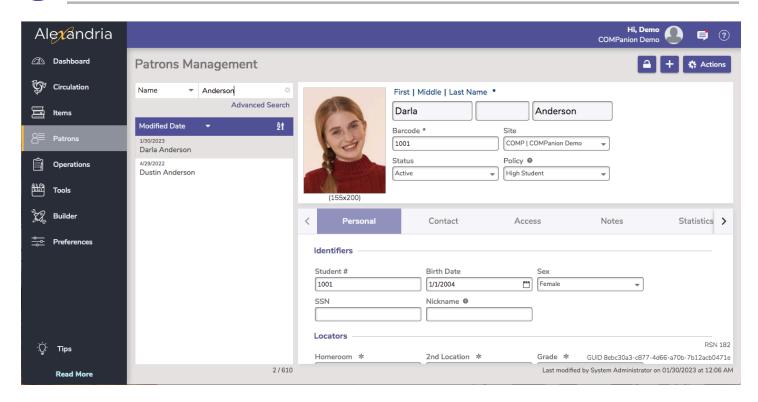
#### To add a new patron record:

- 1. Click on the Patrons module from the Librarian sidenay. (TRICK: You may also click on the Current Patron's name or the words No Current Patron in the Circulation window).
- 2. Unlock Patrons Management by clicking the Lock icon . Click Add Patrons or the Add (+) button near the top right corner to add a new patron to your database.
- 3. Move between the **Personal**, **Contact**, **Access**, **Notes**, and **Programs** tabs, providing information, configuration options, and making changes to the patron record as needed.
- 4. Use the dropdown menus to supply the new patron's Policy, Status, and Sex.
- 5. Use the **Notes** tab to add any special patron alert notes.
- 6. Next, if you intend to give your new patron any operator privileges (e.g. Student Aide), use the **Site**Access selection on the Access tab to mark the sites that your patron is permitted to access.

  Otherwise, leave this selection alone.
- 7. Click **Save** to add your new patron record or **Revert** to discard them.

## 2

## Modifying Patron Records



#### To modify a patron record:

- 1. Click on the Patrons module from the Librarian sidenav.
- 2. Use the Basic or Advanced Search at the top right of patrons management.
- 3. Then select the desired patron from the list in the left pane.
- 4. Unlock the patron's record by clicking on the **Lock** icon  $\triangle$ .
- 5. Go through each of the tabs to make changes to the patron's record and click Save.

## 3 Deleting Patrons

#### To remove a patron record:

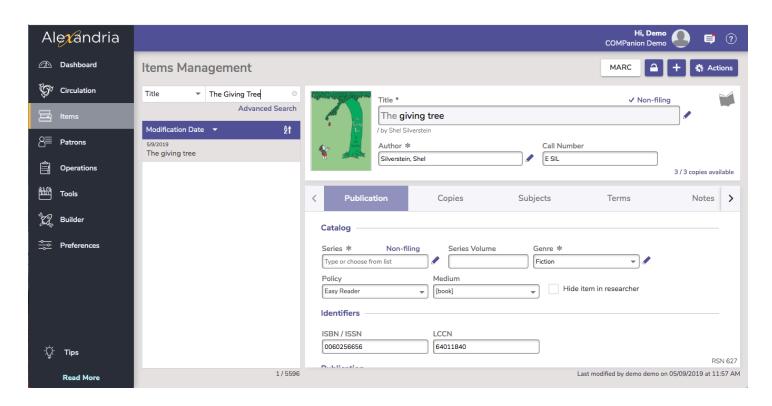
- 1. Click on Patrons from the Librarian sidenav.
- 2. Locate the patron's record and highlight the patron's name in the left pane.
- 3. Unlock the patron's record by clicking on the **Lock** icon  $\triangle$ .
- 4. Click on the **Actions Menu**  and select **Remove Patron**.

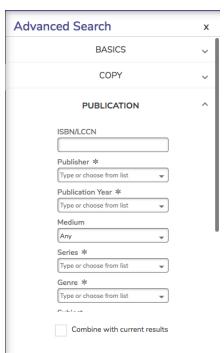


Pay close attention to the Remove Patron window as it will inform you if the patron has items checked out, charges, or credits.

## **ITEMS**

## **Finding Items**



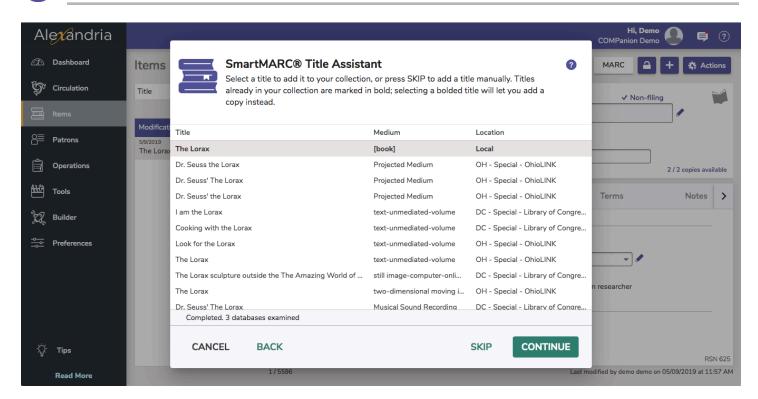


#### To find an item record:

- 1. Click on the Items icon from the Librarian sidenav. Items Management will open.
- 2. Use the **Basic** or **Advanced Search** at the top right of items management.
  - 3. Your results will be listed in the left pane.

## 2

## Adding and Cataloging Titles



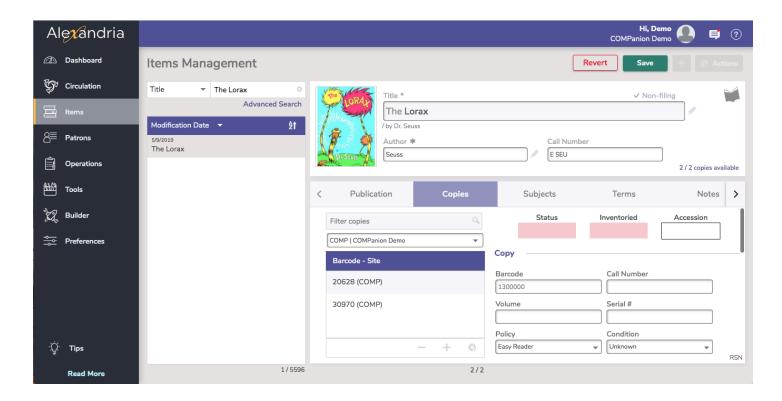
#### To add a new title record to your database:

- 1. Click on Items from the Librarian sidenav.
- 2. Unlock **Items Management** by clicking the **Lock** icon **a**. Click **Add Items** or the **Add (+)** button near the top right corner.
- 3. The **SmartMARC® Title Assistant** will open allowing you to add a new title record. (Press **<enter>** here to add a blank record.)
- 4. Enter the ISBN or Title/Author in the Title Assistant window and click Search.
- 5. Click and highlight to preview the MARC record you like best and click Continue.
  - a. **Local** matches (i.e. results matching bibliographic records already existing in your collection) will be shown first, before other sources in your results list.
- 6. Modify the **Call Number**, update any necessary fields, and select the proper **Policy** for the item from the **Policy** dropdown menu.
- 7. Click **Save** to add your new title record or **Revert** to discard it. At this time you will want to add the initial copy.



There is no guarantee of a match for the record you want specifically. If you don't find the title you were looking for in the search results, remove the old criteria and try different combinations.

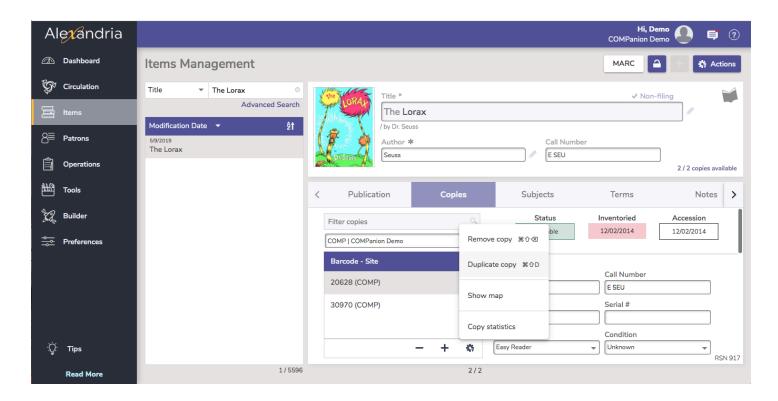
## 3 Adding New Copies



#### To add a new copy to the title record:

- 1. Click on **Items** from the **Librarian sidenav**.
- 2. Locate the title in your database you would like to add copies using the **Basic** or **Advanced Search** at the top right of items management.
- 3. Click the **Copies** tab and use the **Lock** icon to unlock the copy records. Remember, copies are an extension of the title record; the **Copies** tab cannot be selected unless the main title record exists or is saved.
- 4. Next, click the Add (+) button at the bottom of the copy list to add a new copy.
- 5. Pay attention to all of the fields to provide copy-specific information.
- 6. A **Barcode** is required to save your new copy; Alexandria will display the next copy barcode in shadow text, however; feel free to enter your desired barcode.
- 7. Click Save.

## 4 Duplicating Copies



#### To duplicate copies:

- 1. Click on **Items** from the **Librarian sidenav**.
- 2. Locate the title of the copy you wish to duplicate and click on the **Copies** tab.
- 3. Click on the **Actions** icon  $\clubsuit$  at the bottom of the copy list and select **Duplicate Copy**. The **Duplicate Copy** window will appear.
- 4. Fill in the **Beginning Barcode** field and enter the number of additional copies you wish to add in the **Number of Copies** field.
- 5. Click **Duplicate**.

## Cataloging an eBook

When cataloging an eBook, remember that only **Titles** are added, not copies, because they are not physically barcoded items.

To indicate an eBook for **Search** purposes, the eBook **Policy** preference must be set to **Show as ONLINE in Researcher**. Use the **Other** tab to link to the item in your eBook vendors website.

## **CIRCULATION**

The Circulation module is the librarian's primary module, used to perform general library activities such as checking out books, placing hold requests, processing fees, fines, payments, and renewing books. You may also perform special functions such as inventory, cataloging, and record viewing and updating.



## **Circulation Controls**



#### Circulation Modes

Select a **Circulation Mode** from the corresponding drop-down menu, located to the left of the **Command Line**. The selected **Circulation Mode** is the function that will be performed when patron/item barcodes are typed or scanned.

#### Command Line

Use the **Command Line** to input barcodes to perform the indicated Circulation Mode or look up items and patrons.



## Locating a Patron by Name (L) or Item by Title (T)

#### To look up a patron by first OR last name:

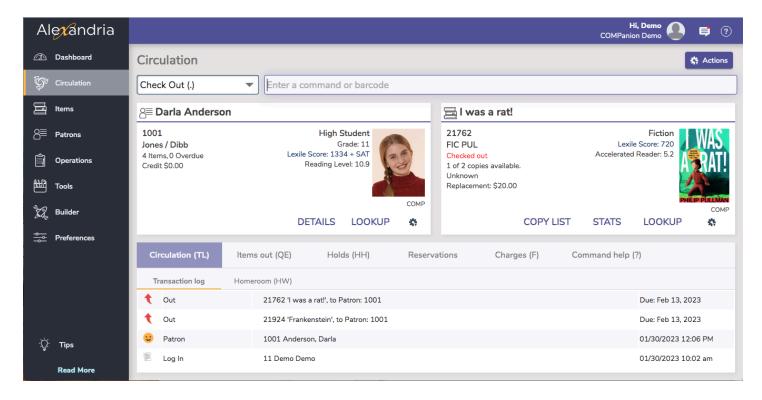
- 1. Open the **Patron Lookup** window by either clicking on the **Lookup** button along the bottom of the patron pane OR by typing **L** in the **Command Line** and pressing **<enter>**.
- 2. Begin typing the patron's name and hit **<enter>**.
- 3. Click on the correct name and then click **Select.** or double-click on the correct name.

#### To look up an item by title:

- 1. Open the **Item Lookup** window by either clicking on the **Lookup** button along the bottom of the item pane OR by typing **T** in the **Command Line** and pressing **<enter>**.
- 2. Type the first part of the title and press **<enter>**.
- 3. Click on the correct title to highlight it and then click on **Select**, or double-click on the correct title.

## 3 Circulation Modes

#### Checkout



#### To check out an item:

- 1. Make sure the circulation mode is set to **Check Out**.
- 2. ALWAYS bring up the patron first.
- 3. Type or scan the barcodes of the items to check out.
- 4. Respond to any Circulation Alert messages.

#### Bookdrop Mode (B)

#### To check in a single item using Bookdrop Mode:

In the **Command Line**, type **B**, then scan or type the barcode of the item to be returned. (This will check the item in without changing the current circulation mode.)

#### To check in multiple items using Bookdrop Mode:

With the circulation mode set to **Bookdrop**, scan or type the barcode of the item you want to check-in into the **Command Line.** If the barcode was typed, press **<enter>**. Repeat this step for each item.

## Place a Hold on a Title (H)

#### To place a hold:

- 1. Make the patron requesting the hold the **Current Patron**.
- 2. Use the Item Lookup window to make the item being held the Current Item.
- 3. Type **H** (for **Hold**) and = (for the **Current Item**) (i.e. **H**=) and press **<enter>**. You may also type **H** and the barcode of the current item (e.g. H 1234). Repeat this step for each item.

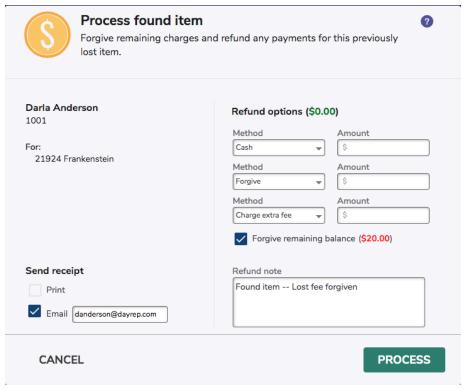
#### Declaring a Copy Lost and Returning a Lost Copy

#### To declare an item lost:

- 1. Make the patron with the lost item(s) current by scanning or typing their patron barcode. If the barcode was typed, press **<enter>**.
- 2. Click on the Items Out (QE) tab.
- 3. Highlight the desired item(s).
- 4. Click on Declare Lost.
- 5. If you are sure you want to make the selected item(s) lost, click **Yes** on the dialog window that opens.
- 6. Complete the process in the **Lost Item Fee** window where you may forgive a portion or all of the charge, take a payment, and print or email a receipt.

#### **Processing a found item:**

- 1. Bookdrop the item, and when asked if you would like to process the lost item, click Yes.
- 2. Complete the process in the **Process Found Item** window by refunding previous payments, forgiving remaining lost fees, or charging an extra fee.
- 3. Once done, click **Process**.



#### **Discarding Item Copies**

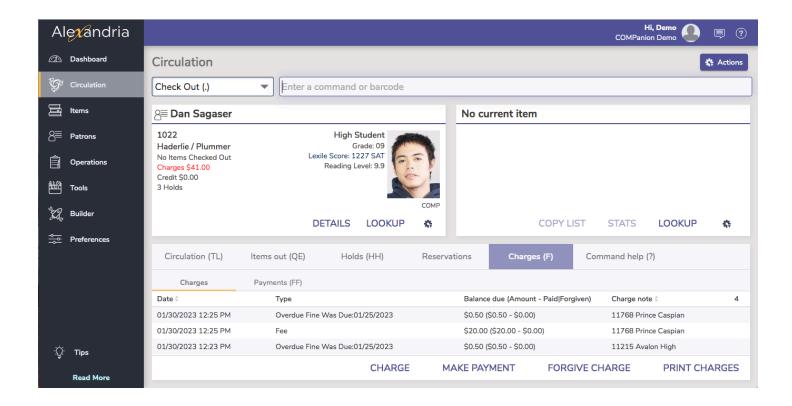
#### To discard a single damaged item:

- 1. Select **Discard Mode** from the **Circulation Mode** dropdown menu or type **DM** in the **Command Line** and press **<enter>**. Select **Damaged** for the discard reason.
- 2. Scan or type the barcode for the damaged item to be discarded. The **Discarded Copies** patron will become the **Current Patron**.
- 3. Scan or enter the barcodes of all items you are discarding.
- 4. To exit discard mode, use the mode menu to go back to **Check Out** or use the **X** command to clear the current patron and item and reset back to **Check Out** mode.



## Handling Charges and Fines

Charges include the end result of overdue fines, lost or damaged fees, and manually-charged amounts. Overdue fines continuously accumulate until items are returned. Once the item is returned, the fine becomes a charge.

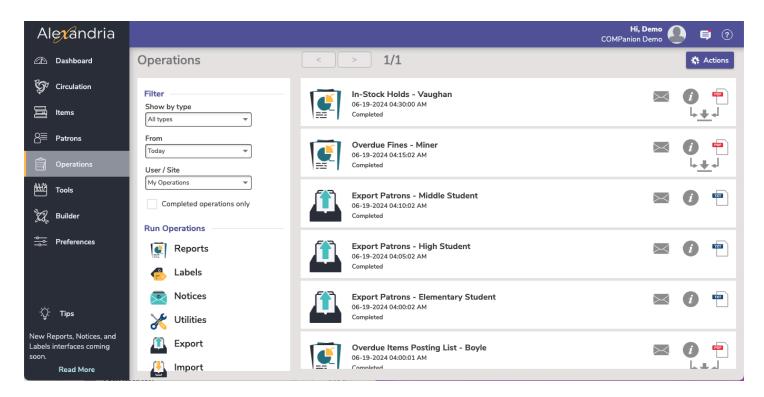


The **Charges** tab has two subtabs used for managing money in your library:

- **Charges:** On this subtab, you manage current charges and fines. From here, you can manually charge the current patron, process payments, and forgive charges.
- **Payments:** On this subtab, you manage past payments and credits. This includes issuing refunds, adding credit, or refunding credit.

## **OPERATIONS**

Operations is where you access Reports, Labels, Notices, Utilities, Exports, and Imports, and contains the feed of recent operations for you to email, view, and download.





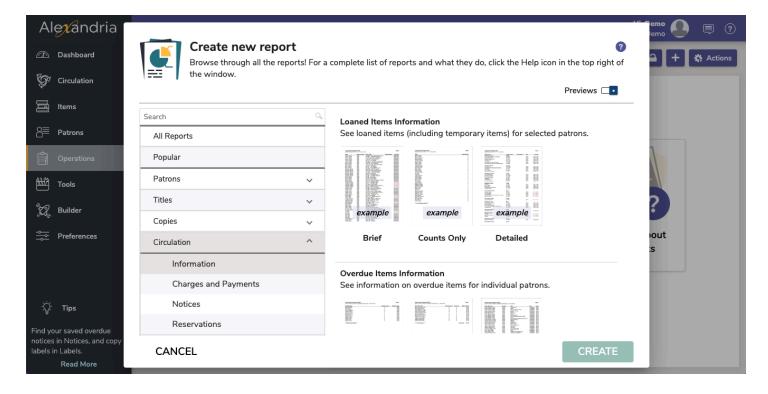
## Reports

Alexandria's Reports interface allows you to create reports that only include pertinent information, such as records of interest, transaction types, and balance selections. You can also schedule reports and deliver their output via email, FTP, etc.

On the left, you'll have a list of your saved reports. To the right, you have the details pane, where you can add a report, see report schedules, and learn more about reports. Once a report is selected, it will show the details of the selected report.



Check out the Complete Reports List to learn what each report does, what you can use it for, and what the outputs look like.



#### To create a new Loaned Items Information report:

- 1. Select **Operations**, then **Reports**.
- 2. Click Add report or the plus (+) sign to the top right.
- 3. Use the **Categories** pane on the left to select **Circulation > Information**. Then select **Loaned Items Information** from the templates list to the right.
  - a. Turn on Previews to see examples of the different formats of the report!
- 4. Click Create.
- 5. Customize and build the new report by going through each of the different tabs, **Overview**, **Selections**, and **Options**.
- 6. Click **Run** in the bottom right corner of the window to queue the report in **Operations Management**. If you haven't saved the report and want to save the template and customizations for future use, click **Save and Run**.
- 7. Retrieve the report by going back to **Operations** or using the **Message Drawer**, then click the PDF icon once the report is ready.

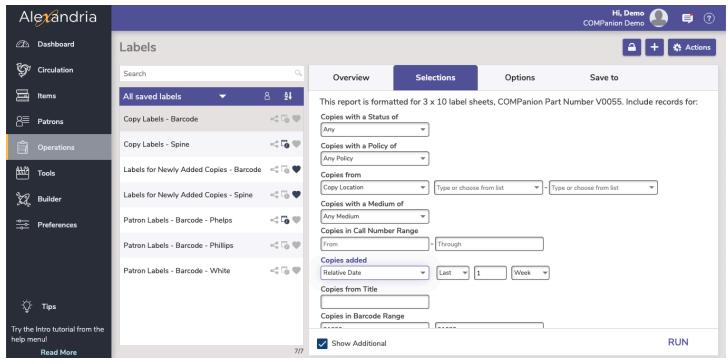


Don't see a selection you like? Click Show Additional Selections at the bottom of the window to see more!

## 2 Labels

Labels in Alexandria allow you to customize and save barcode and spine labels for your items, as well as patron labels and library cards.

On the left, you'll have a list of saved labels. To the right, you have the details pane. Once a label is selected, it will show the details of the selected label report.



#### To customize and print new copy barcode labels:

- 1. Go to Operations > Labels.
- 2. Click Add label or the plus (+) sign to the top right.
- Select Copies from the categories on the left, then Copy Labels (3x10) Barcode Labels from the right.
  - a. Turn on the Previews to see an example of the labels!
- 4. Click Create.
- 5. On the **Overview** tab, customize your label name and add any specific notes.
- 6. From the **Selections** tab, use the **Copies added** field to enter the date range of when the items were added to Alexandria.
  - Alternatively, change the Date Range to a Relative Date of This 1 Week to print labels for items added in the current Sun-Sat week.
- 7. Customize the information printed on the label, and select any labels to skip from the **Options** tab.
- 8. Click Run To save the label format for future use, customize the label name and click Save and Run
- Retrieve the report by going back to **Operations** or using the **Message Drawer**, then click the PDF icon once the report is ready.

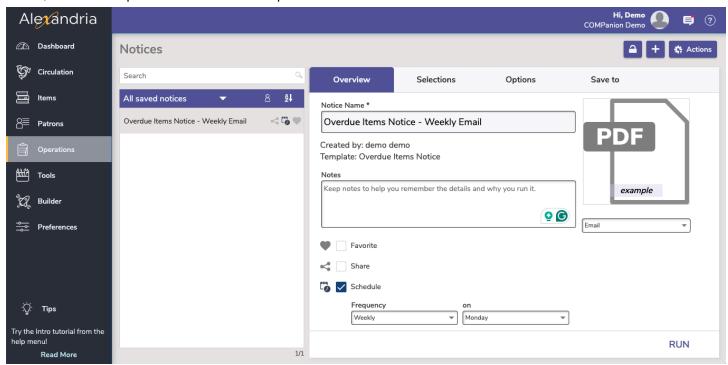


For labels to print correctly, set your printer page scaling to none or 100%. We suggest first printing a test page on a regular sheet of paper to ensure the labels line up!

## 3 Notices

**Notices** allows you to customize and save the email and print notices you send to your patrons. Print or send notices to remind patrons of items that are coming due, overdue, in-stock holds that are ready for pickup, and more!

Once you've opened Notices, on the left, you'll have a list of your saved notices. To the right, you have the details pane. Once a notice is selected, it will show the details of the selected notice. When adding a new notice, turn on the previews to view examples of the different notice formats!



#### To create a saved, Overdue Notice Report and schedule it to be emailed weekly:

- 1. Go to Operations > Notices
- 2. Click Add notice or the plus (+) sign to the top right.
- 3. Select Items Out from the categories on the left, then Overdue Items Notice from the right.
- 4. Click Create.
- 5. On the **Overview** tab, click the **Schedule** checkbox.
  - a. Set the **Frequency** and the desired day and time the report will be run.
  - b. If you want to be notified once the notice has been sent, select **Notify** and enter your email address in the **Send notification to** field.
- 6. From the **Selections** tab, enter the selection criteria for the report including **Patron Status**, **Days Overdue**, **Patron Homeroom**, **Patron Grade**, and more.
- 7. On the **Options** tab, select the email format, which emails you want to notice sent to, if you would like to include cover art, and customize the letter text.
- 8. Click **Save** in the upper right-hand corner.



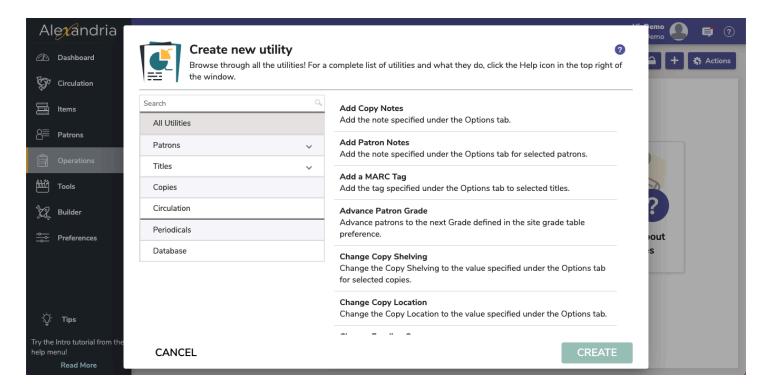
To send email notices through Alexandria, you will first need to set up your Email Preferences.

## 4 Utilities

**Utilities** can be accessed by selecting **Operations** from the **Librarian sidenav**. Utilities are used to change large amounts of information in your database at once. The Utilities window allows you to create your own set of essential utilities; we provide the general templates that help you build utilities that modify, transfer, remove, update, or verify the information you require.

When adding new utilities, follow the same process used when creating reports by picking the proper category from the **Categories** pane and selecting the desired utility from the Templates pane. The rest of the process should look familiar to you from the **Reports** section covered previously.

Run the Database Archive utility before running any major operations to create an archive. That way, you can restore your old data if something goes wrong. Learn more about Archives on the Support Center.





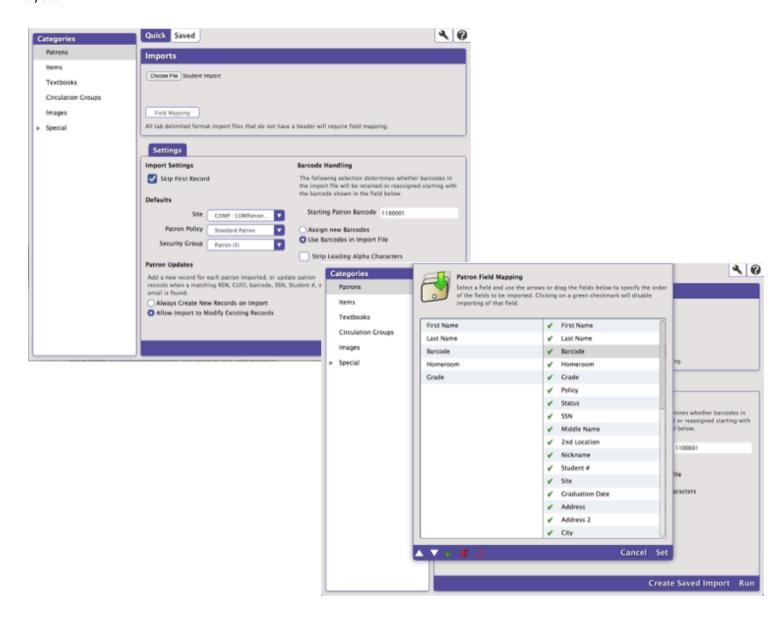
Check out the **Complete Utilities List** to learn what each utility does, when you might use it, and what certain options do.



There are times when you'll want to add information into Alexandria from outside sources (such as MARC records, book vendors, or patron information from a central database), called an **Import**. Our software supports the importation of patron, item, and images.

## **Importing Patron Records**

Patron records may be imported into Alexandria from a tab delimited file. If you have a student information system (SIS) that can export student data in a tab delimited format, please look at the fields in **Patron**Management to determine what information you wish to have exported from your student information system.



#### To import patron records:

- 1. Click **Operations** from the **Librarian sidenav** and select **Import**.
- 2. Click **Patrons** from the **Categories** pane.
- 3. Select **Allow Import to Modify Existing Records** in order to import current information into existing patron records.
- 4. If the import file includes barcode numbers for your patrons, select **Use Barcodes in Import File**. Otherwise, Alexandria will sequentially assign barcodes starting with the barcode number displayed in the **Starting Patron Barcode** field.
- 5. Browse and select the file to be added.
- 6. Click the **Field Mapping** button. In the **Field Mapping** window, match the fields in the import file with the appropriate fields in the patron record by clicking and dragging the fields on the left to match up horizontally with the fields to the right. Click **Set**.
- 7. Click on **Run** to queue the patron import.



Alexandria will set various fields by default. For example, **Policy** and **Status** will be saved as **Standard** and **Active** respectively if another policy is not selected or included in the import file. Take the opportunity to add as many fields as you have available. Alexandria will fill in the **Username** and **Password** using the patron's barcode for the **Username** and their last name for the **Password** if one is not provided.

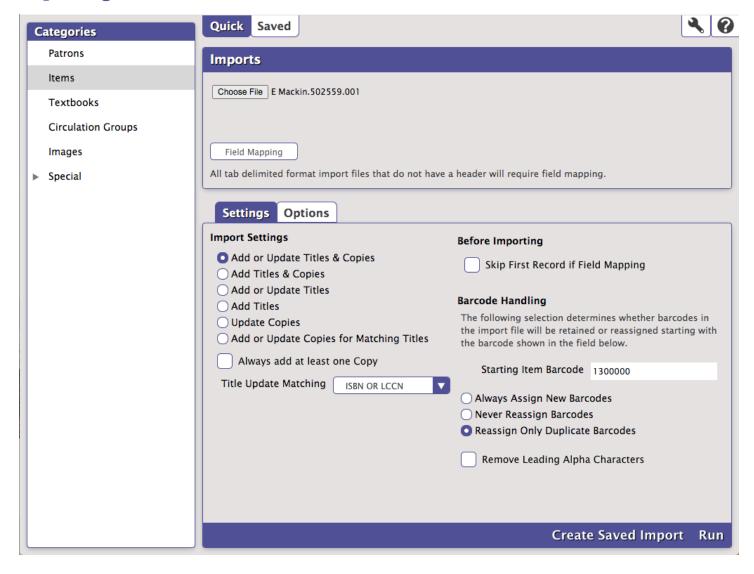
#### To import patron pictures:

- 1. Go to the **Operations** and select **Import**.
- 2. Click on **Images** from the **Categories** pane.
- 3. Select **Patron Pictures** from the options on the **Settings** tab.
- 4. Browse and select the folder containing the picture files.
- 5. Click Run. The import will be queued in Operation Management.



The file needs to be zipped and 50 MB or smaller. If the file is larger than 50 MB, schedule an FTP import on the **Saved** tab. For best results, images should be approximately 186 x 240 pixels in size and either .jpg or .png in format.

#### **Importing Items**



#### To import item records from a vendor file:

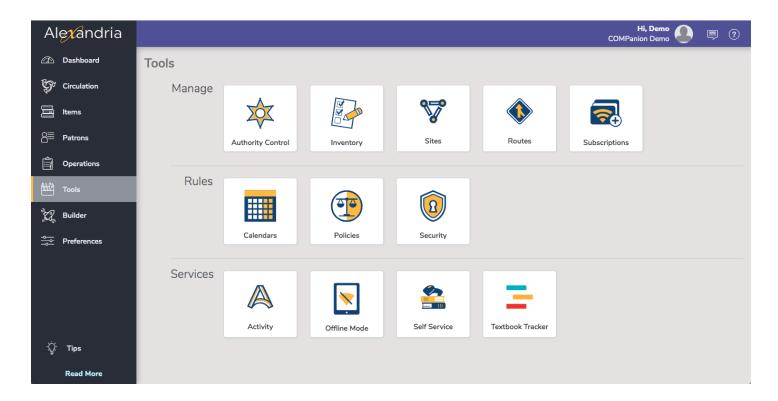
- 1. Go to **Operations** and select **Import**.
- 2. Click the **Items** category in the **Categories** pane.
- 3. Use the **Settings** tab to set your selections for the item import. When importing item records for eBooks from a vendor, select **Import Titles Only** from the **Import Settings** section.
- 4. Use the **Choose File** button to find and select the file to be added.
- 5. Click on **Run** to queue the item import.



If you would like to run an archive before making mass changes to the database, for example, when running utilities or imports, please run the **Database Archive** utility (**Tools > Utilities > Database**).

## **TOOLS**

Tools contains convenient shortcuts to a wide range of program and management tools that perform a variety of tasks.



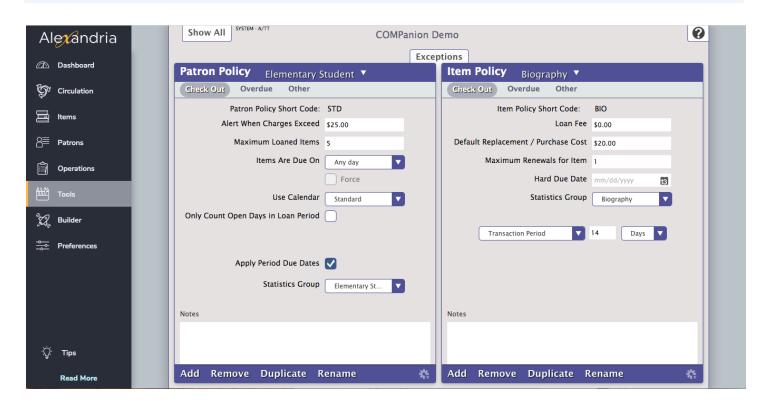


#### **POLICIES**

**Patron Policies** establish circulation privileges for patrons, while the rules for circulating various types of items are established within the **Item Policies**. For example, you can set policies that allow tenth graders to check items out for longer periods of time than second graders; the borrowing period for reference items can be set for one day, while fiction and nonfiction works can be set for two weeks, etc.



Statistical data is generated within Alexandria is determined by the policies you create.



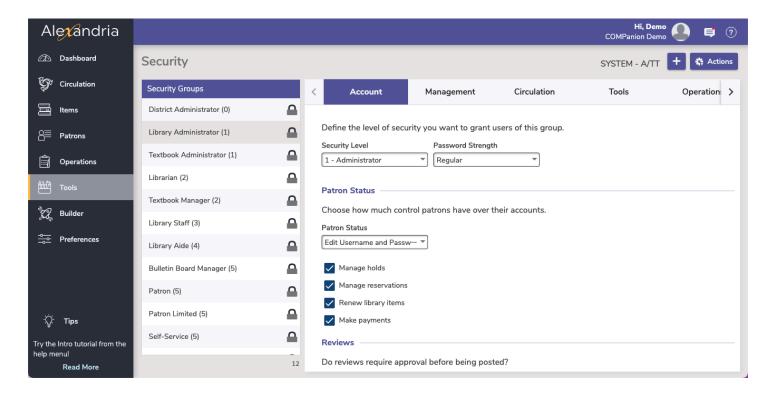
When you first enter Alexandria, **Standard Patron** and **System Patron** are set as default patron policies while **Standard Item**, **System Item**, **and Textbook** are set as policy defaults for items. We suggest you adjust the settings for Standard Patron and Standard Item to reflect what would be applicable for the majority of your patrons and items so that if you ever forget to change a patron (or an item) policy to the appropriate policy, generally, your library's established procedures will be followed.

## 2 Security

#### **SECURITY**

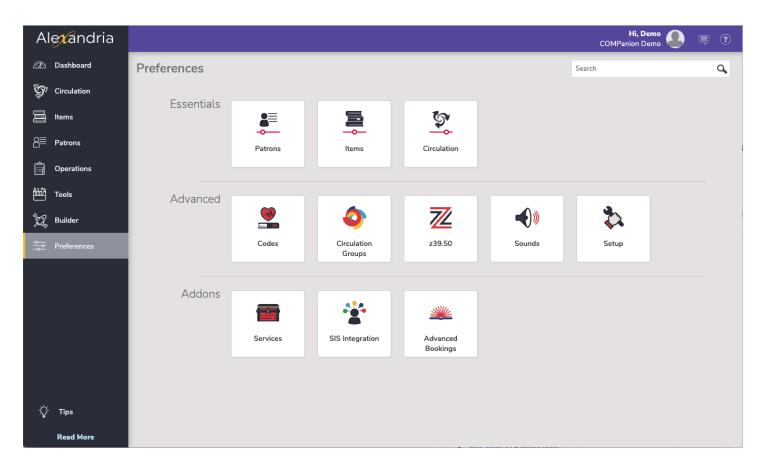
Security preferences allow operators (with the appropriate authority) to modify existing or create their custom security groups. Set permissions for Management (patrons/items), Tools, Circulation, Preferences, Reporting/Operations, and Researcher/Account settings. In turn, these Security Groups (assigned to individuals in Patrons Management) determine what actions operators or patrons are permitted to perform. By default, Administrator-level access are the only security groups that allow you to do this.

Settings are listed top to bottom from least to most access.



## **PREFERENCES**

The Preferences window is where you can customize Alexandria to suit your needs by setting system (i.e. "global") and site (i.e. "local") preferences.



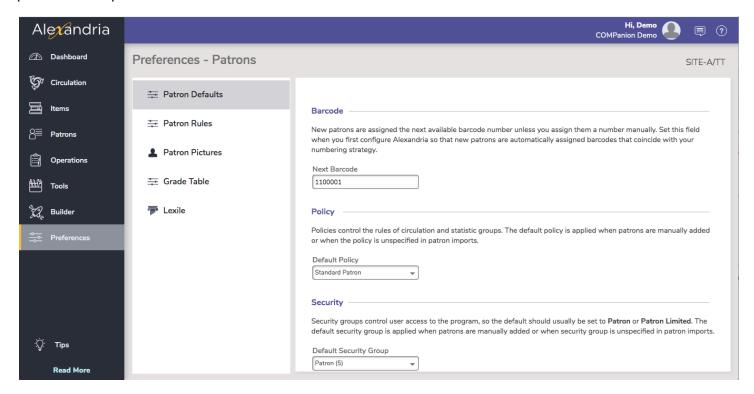
#### **PATRONS**

#### **Patron Defaults**

Use these preferences to configure some of the default settings applied to new patrons when they are added to your system; for example, set the patron's **Default Policy** and **Next Barcode**.

#### **Patron Rules**

Set the default state of the Keep Patron History option for your patrons, and also choose to enable/disable patron card expiration dates.



#### **Patron Pictures**

You can affix nearly any image supported by your browser (commonly accepted formats are .jpg, .gif, .png, or .bmp) into one of the three gender-based patron picture fields. If you don't have individual patron portraits assigned in the **Personal Info** tab of the **Patron Management** window, these pictures will be used instead. Optimal image size for patron pictures is 186 pixels wide by 240 pixels high.

#### **Grade Table**

Individually enter each grade level relevant to your union in the order they should be sorted and incremented. This is a simple list; the first entry in the **Grade Table** will be your first grade level, the second will be the next grade level, etc. The **Grade** and **Description** entries in the table are fully customizable, allowing you to use whatever terminology you desire.



Make sure the grades entered in the Grade Table and Patrons Management are the exact same. For example, if the grades in Patrons Management show as 01, 02, 03, and so on, then the grades in the Grade Table should show as 01, 02, 03, etc.

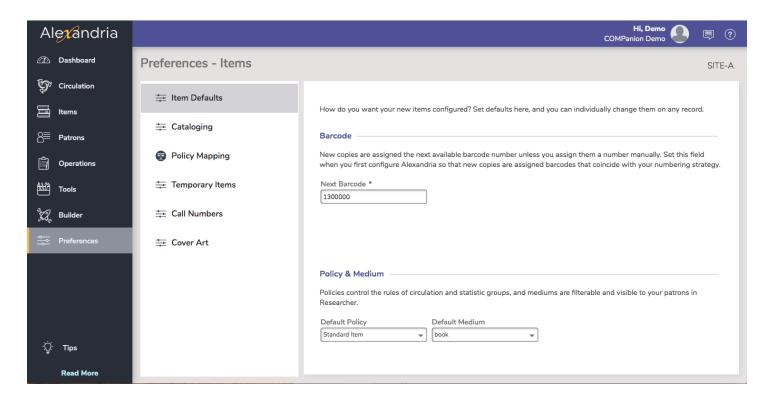
#### Lexile

The Lexile values established here are used to track your patron's reading progress as they move from kindergarten through high school.

#### **ITEMS**

#### **Item Defaults**

Configure some of the default settings that are applied to new items (i.e. title and copy records) when they are added to your collection.



#### **Policy Mapping**

Centralized Catalog users often want items at their location to use their own policies (for better statistics reporting); the Policy Mapping preferences tab allows you to input lists of call number ranges which can be used to link import items (i.e. items entered via import only) to existing policies at your site. Provide an alphabetic value for call numbers beginning with letters of the alphabet (e.g. ABC) or a numeric value to designate call numbers that fall within a numeric range (e.g. 300-310).

#### **Temporary Items**

Use these settings to establish a "temporary item" barcode range. Any item loaned using a temporary item barcode number is considered a "temporary" check out—but only if that number hasn't been previously assigned to a patron or an item.

#### **Call Numbers**

These preferences are used to help manage and configure your catalog classification system so that you can allocate call numbers to your resources.

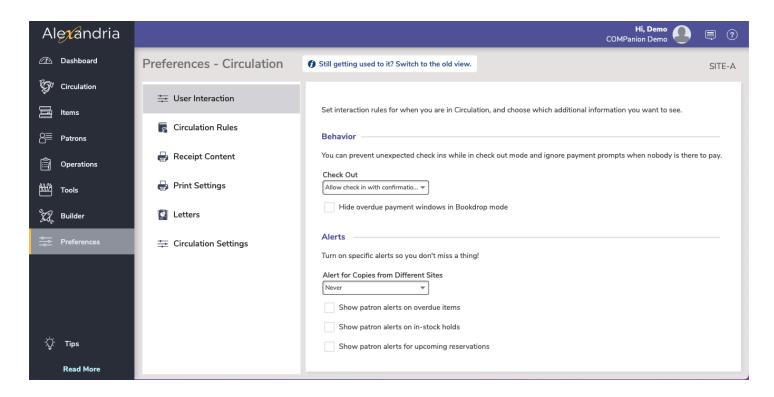
#### **Cover Art**

Titles without cover art show these default images based on medium. Turn on **Automatically Retrieve Cover Art During Idle Periods** if you want Alexandria to find cover art for you (using ISBN to match).

#### **CIRCULATION**

#### **User Interaction**

These preferences control the level of interaction that operators have with the program and what additional content is displayed.



#### **Circulation Rules**

Configure general circulation settings for holds and reservations.

#### **Receipt Content**

If you print receipts for patrons at your site, these preferences allow you to customize the information printed on your receipts; this information applies whether you print an 8.5"x 11" receipt from a local or network printer or a 3" receipt from one of COMPanion's Receipt Printers.

#### **Print Settings**

These preferences activate the COMPanion Network Receipt Printer, which provides a convenient and economical means of printing receipts for common circulation transactions such as check outs, placed holds, fines, fees, payments, and refunds.

#### Letters

Customize and manage the messages that appear in the patron notices from your library; these include overdue notices, recall messages, etc.. Use the Letter Type section to select the notice to edit.

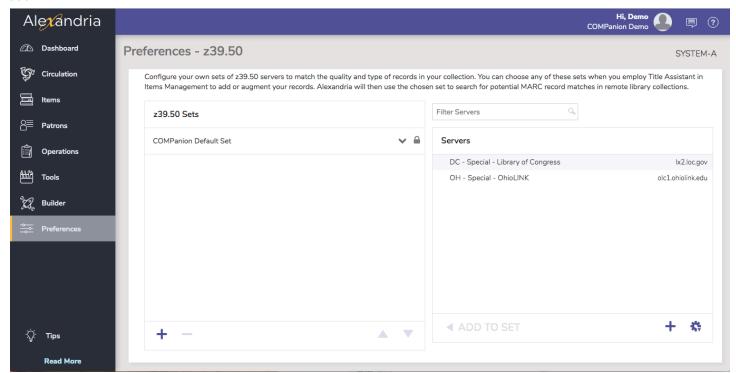
#### **Circulation Settings**

This is where you will Enable **Automatic Email Notifications**. For those in a Centralized Catalog environment, the Interlibrary Loans settings configure the default time periods (in days) allowed for items "in transit" or "in stock" before showing up in the In Transit to Current Site, Late in Arrival report.

#### **Z39.50**

Alexandria's **Z39.50** preferences allow you to add, edit, test, or remove Z39.50 server addresses and even store them in "sets".

The left-hand side of the Z39.50 preference contains the **Sets** pane, where all your sets are displayed in chronological order. The Sets list is essentially a collection of Z39.50 server addresses that you can **Add** or **Remove**. The footer contains tools for adding, removing, or rearranging Z39.50 server addresses within the set.



## RESEARCHER



Alexandria Researcher is a collection of robust, visually engaging, and intuitive library search interfaces that appeal to children, teenagers, and adults. Both patrons and operators can search authorized collections over the web.

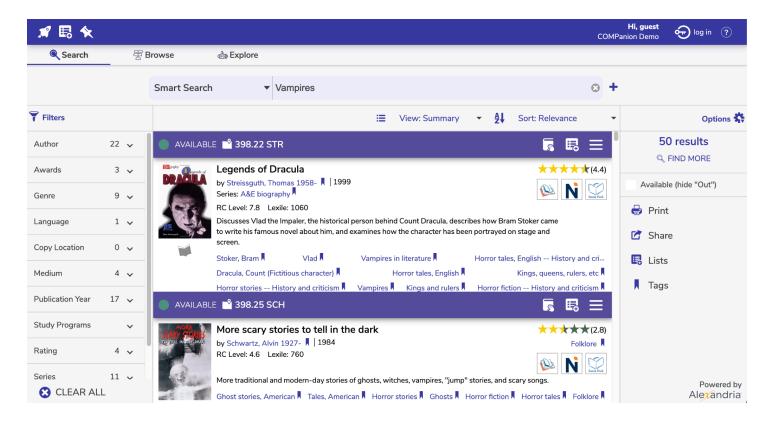
Researcher can be accessed from **Librarian** by selecting **Researcher** from the **Dashboard**. Otherwise, patrons can access the Researcher Hub directly from your Alexandria URL, or by appending /researcher to the URL of their favorite internet browser.



Use **Builder** > Display to set your logo, logo mark, and welcome message for Researcher, and to set the Researcher Pane. You can completely customize the buttons of the Researcher Pane in **Explore Builder**.

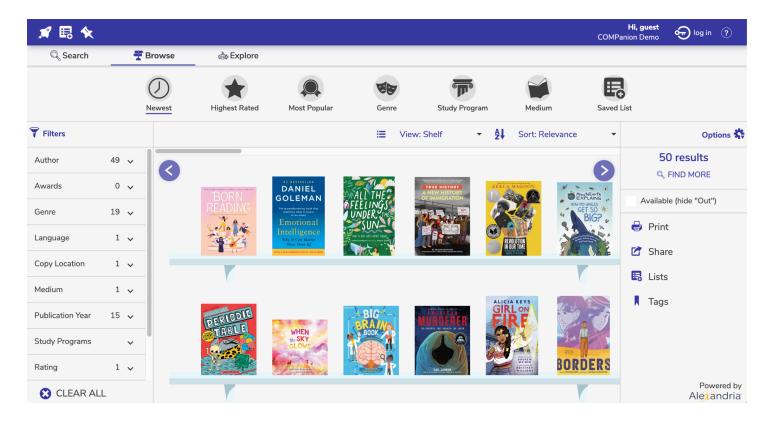
## Search

Alexandria Search is our main OPAC, a customizable and powerful search with numerous tools that allow you to find exactly what you want. The most common way to search is using Smart Search, which allows you to enter any keyword and gives you the most relevant results. You can create more specialized searches by conducting an advanced search, and by adding filters—such as searching for titles that have won Awards, or searching for only eBooks.



## 2 Browse

Browse is an engaging way to display your items in a shelf view, no searching required! Patrons can choose the highlighted items by using one of seven options. Some of the browse-by options are instantaneous (Newest, Highest Rated, Most Popular), while some require input from the user (Genre, Study Program, Medium, Saved Lists) to pick what they want to browse.



**Browse by Newest** is where patrons can view up to 50 of the most recently added titles to your library that have been added in the last 180 days.

**Highest Rated** will display up to 50 of your library's highest-rated items.

**Most Popular**, view the most 'popular' items in your library. Popularity is calculated based on accession date, checkouts, holds, ratings, and more.

**Genre** allows patrons to choose up to 10 different genres to view at a time and will sort the items in Title Call Number order.

Study Program, use this option to limit results to particular study program levels or ranges.

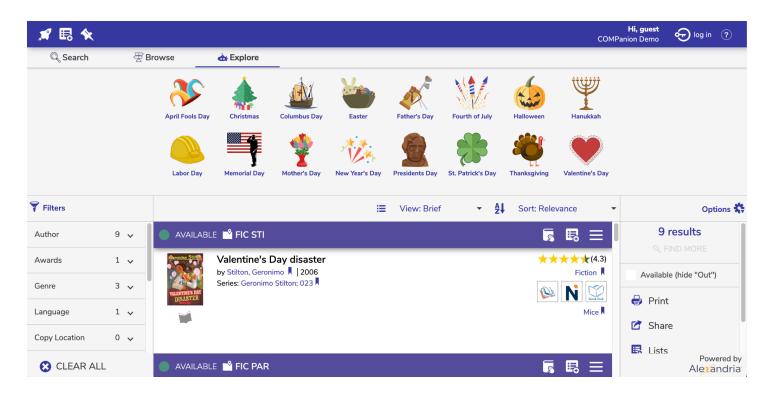
**Medium**, if you aren't sure what kind of item you want, but you know the medium, this is a great place to start!

**Saved List**, browse any list that is shared as Searchable.

## 3 Explore

Alexandria's Explore is a visually engaging, graphical interface that uses large, clickable icons to locate items or resources in your collection. It's perfect for separating your catalog into Collections. Additionally, the entire visual interface can be completely customized and used in a number of different ways to meet the needs of your library. Customize Explore with Explore Builder.

To search using the Alexandria Explore interface, click on any one of the picture buttons. Some of these pictures will perform instant searches, others will take you to new panes, and some can even open outside websites in a new tab of your web browser.



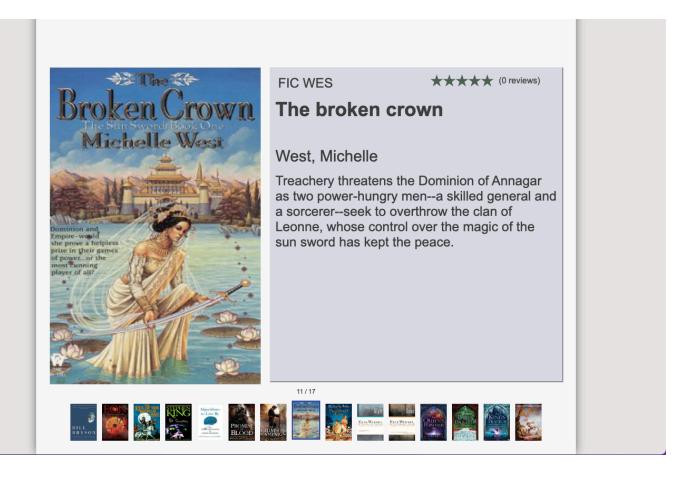


Scout is a fast, powerful, and genuinely intuitive smart search that favors titles, authors, series, and subjects before all other results—the most relevant items are returned first, and exact matches are given priority over other keywords.



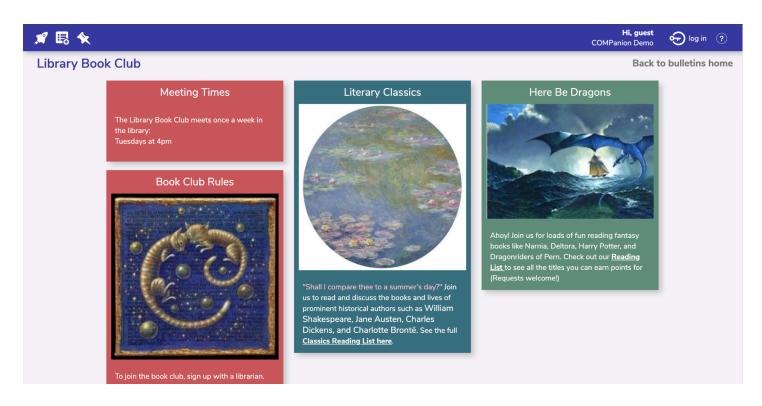
## 5 Slideshow

**Slideshow** is a fun way to dynamically display a range of titles from search or saved results to promote a theme or subject. You can run Slideshow on a TV monitor, or set it up on a computer or tablet so patrons can select items in the list. It's a great way for your students to see some of the items available in your library without logging in to Researcher.



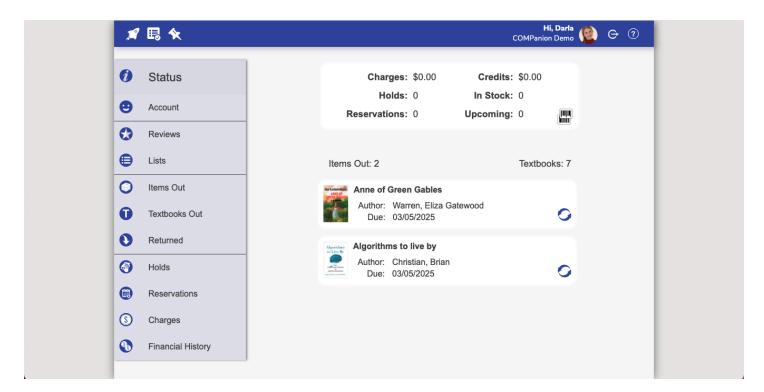
## 6 Bulletins

Bulletin Board Management allows you to create virtual boards where you may post and share public bulletins. Create notices for your library, student-based clubs, and upcoming school events; these bulletins can contain both text and images. Bulletins may also contain links to outside reading lists or anything with an associated URL; these optional URLs will open in a new browser tab/window.





Patron Status is your patron's portal to their personal library account. It's where users can check their account status, view their holds and charges, renew items they've checked out, and more. They can manage their account from home (or anywhere else!) so they can spend more time reading.





For more information, contact Alexandria Customer Support. As long as your site's software subscription is current, anytime you have a problem or a question, you have access to COMPanion's Customer Support Team.

1 (800) 347-4942 | support@goalexandria.com

Or visit our online Support Center at support.companioncorp.com/display/ALEX.