You no longer have access Support and Updates. Renew online, remind me later or never remind me again.

Alexandria dream makeover Pardon the mess! The Support Center is undergoing construction. →

Alexandria Support Center

Circulation Items Patrons Operations Tools Researcher Builder Preferences Support

Getting Started

- Alexandria Requirements
- Welcome to Alexandria
- Alexandria Setup Options
- Maintenance Strategies
- Release Notes
- Accessing Alexandria
- Alexandria Add-ons
- Alexandria Statistics
- Researcher Statistics
- Email Notices
- Alexandria Librarian
- Demo Data
- Hotkeys
- Keycode Directory
- Kiosk Mode
- Security Best Practices
- Switch to Alexandria 7
- Conversion Review Agreement
- Video Directory
- Third Party Scanner Troubleshooting
- Terms of Service & Privacy Policy
- Protecting Student Privacy
- Accessibility Statement
- **Alexandria Makeover**
- Dashboard
- Tutorials

Alexandria Makeover

Last Updated: $action.dateFormatter.formatDateTime($content.getLastModificationDate())

Overview Changes FAQs Webinar

Changes

As of 22.11 this page will no longer be updated. Keep informed of future changes by signing up for our release announcements!

Curious about what's to come? Here are detailed lists outlining what we're doing to make Alexandria and Textbook Tracker easier and faster to use. Check out the Changed columns to see which changes have occurred already.

Try it out on our demo: https://ccdemo.goalexandria.com/circulation

Log in with username **demo** and password **demo**.

Do you have feedback or questions about the Makeover? Take our short survey. (The survey has been CLOSED.)

Network Printer Security Certificate Form

Password Management Best Practices

How helpful was this page?

Unknown macro: 'rate'

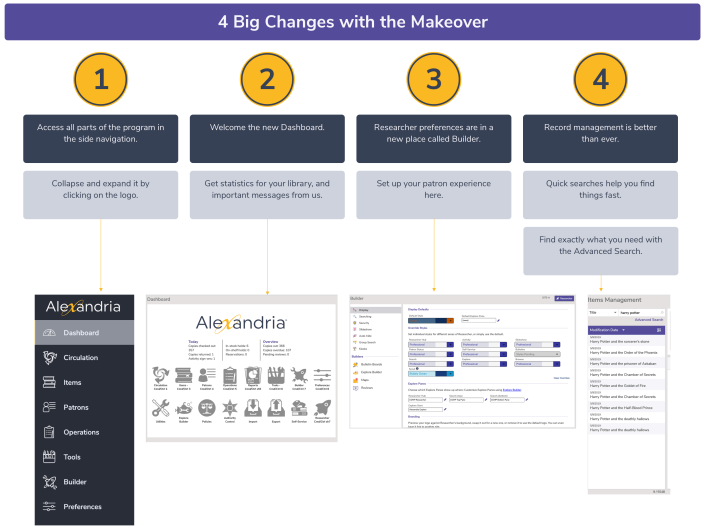
Tell us what we can improve.

Select Language

Powered by Google Translate

Save as PDF

All Interfaces



› Known issues (release 22.9 20230221)...

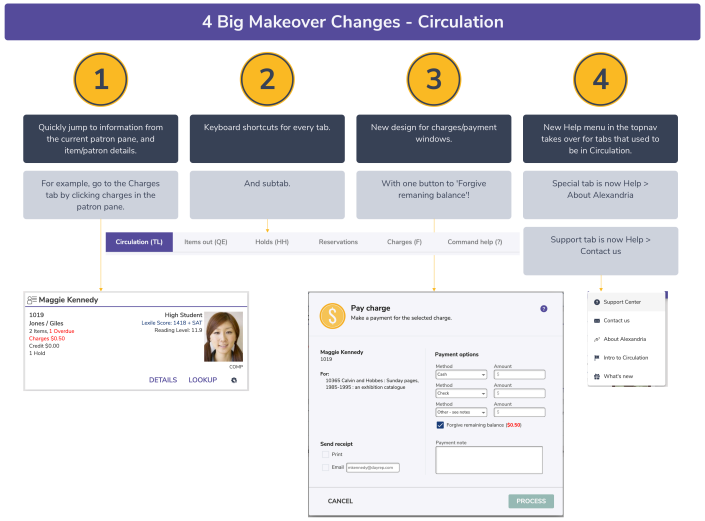
- The first time you (your user) enter every interface, you'll see our new tutorials! Or to see them again, go to the Help menu and choose 'Intro to...'.
- ESC doesn't cancel out of some dialogs.
- -
- The first time you enter every interface, you'll see the 'this is still in beta' alert. That is intentional, since they are still in beta (as of 22.8/22.9 this will no longer happen)
- Dashboard quick buttons won't open up the beta interfaces. This is intentional. (as of 22.8/22.9 it will work as expected)
- We are behind on our Spanish translations! We have new translations and are scheduled to add them with 22.10.

Here are some things you can look forward to across the whole program:

- New interface and new icons
- **Responsive design** (resized for a better experience across all devices, including iPads and mobile phones)
- WCAG 2 AA compliant **accessibility** in regard to responsiveness, colors, text size, help text, tooltips, errors/validation, and more
- Alexandria is now purple, and Textbook Tracker is yellow—it's easy to tell them apart! (To prepare, Alexandria colors became purple in 21.9)
- New **top navigation** that allows you to see your site and operator, log out, and access help, messages, and operations from anywhere
- New **help** icon in the top navigation that will give you universal access to viewing the Support Center, sending a Support ticket, and checking license information
- New **side navigation** that allows you access to anywhere in Alexandria from anywhere in Alexandria

- In-app **tutorials** to help new users, and show off new features
- Organizational and textual changes to tabs and dialogs to improve flow and clarity
- **In-line errors** to let you know when a data entry mistake is made (including character limits)
- Indication for **required fields** and Authority Controlled fields
- Confirmations show in "**snackbars**" instead of dialogs, which means less clicking
- Various **tips** regarding the current interface will appear at the bottom of the side navigation
- Visible **keyboard shortcuts**
- Click on patron pictures and cover art to **view larger images**
- **New login** windows and messaging (21.12)

Circulation



› Known issues (release 22.9 20230221)...

- Patron Lookup is sorting by last name but not sub-sorting by patron first name. (schedule 22.10)
- Some issues with the Barcode Range command. (schedule 22.10)
- LA command isn't looking up by site. (schedule 22.11)
- For really long titles/subtitles the Items out tab is pushing other columns off the screen.
- Can't remove Reserves.
- Are **sounds** not behaving right for you? Or are you experiencing any lagging? Please use the help menu in the topnav > **Contact us** > send us a message letting us know! Thank you!
- If you've had your Circulation open for a long period of time with lots of transactions, the transaction log may cause

Circulation to be bogged down. Try refreshing and it should solve the issue. We are looking into ways to optimize this 🙂
- -
- Switching modes with the dropdown menu takes focus away from the command line. (fixed 22.6)
- Lost Copies mode is missing from the modes dropdown in Textbook Tracker. (fixed 22.8)
- Emailing patron details isn't autofilling the patron's email. (fixed 22.8)
- Current Item doesn't show series information. (fixed 22.8)
- Place Reservation doesn't highlight the range correctly. (scheduled 22.10)
- Removing patrons...doesn't actually remove the patron. (scheduled 22.10)

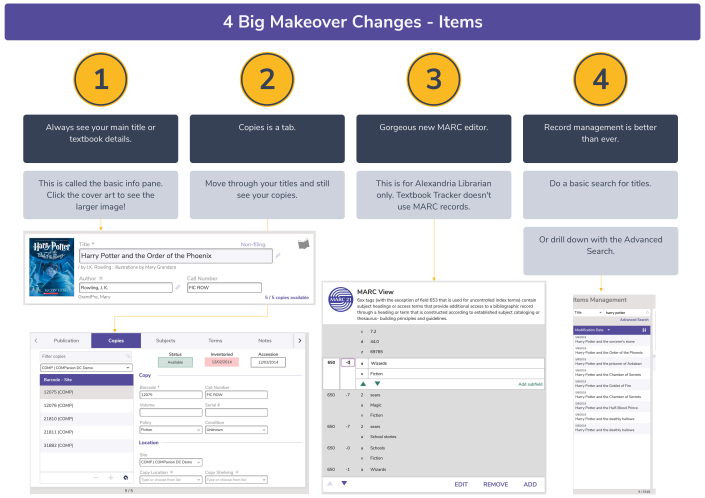
Changed

- Renewals tab renamed "Items out" **(7.19.10)**
- Charges History tab renamed "Payments" **(7.19.10)**
- Moved the Notes button out of the Current Patron and Current Item pane footers (access via command shortcuts and Actions menus) **(7.19.10)**
- Added visible shortcuts to some tabs **(7.19.10)**
- Moved the Command Help tab to the rightmost end **(7.19.10)**
- New Patron Details **(20.1)**
- New Item Details **(20.3)**
- New Copy List, accessible from Circulation (*Alexandria Librarian **20.3** Textbook Tracker **21.1***)
- Repeated buttons have been removed from the Actions menu in both the Current Patron and the Current Item panes **(21.3)**

Upcoming

- See patron pictures and today's checkouts in the Homeroom tab **(betas 21.10)**
- Checkout dates displayed in the Items out tab **(betas 21.10)**
- Sort by due date in the Items out tab **(betas 21.10)**
- Forgive Charge button added to Charges tab **(betas 21.10)**
- Support and Special tabs removed; access these features and information in the new help icon **(betas 21.10)**
- New and improved charges tabs and dialogs **(betas 21.10)**
- Can copy text (like the barcode) from Current Item and Patron panes **(betas 21.10)**
- Lookup by Series **(betas 21.10)**
- All dialogs have been redesigned for easier use and clarity of information **(betas 21.10)**
- Brand new icons **(betas 21.10)**
- Patron Lookup window shows nickname **(betas 22.1)**
- Charges tab entries now have a tooltip so you can see the full charge note **(betas 22.1)**
- Nickname shows in Homeroom tab **(betas 22.1)**
- Level (e.g. Grade) shows in the Current Patron pane **(betas 22.1)**
- Cover art shows for Lost items in Patron Details **(betas 22.2)**

Items Management



› Known issues (release 22.9 20230221)...

- Some keyboard shortcuts aren't working yet.
- Filtering copies when you have more than 1000 is no bueno.
- When you add a new title then add a copy, the copy doesn't show up immediately in the list. But it's there! Just change to a different title and back. We'll improve this soon.
- Title and copy have to be unlocked separately. If you unlock Copies but not Titles, the add button at the top is still disabled; in this case, add copies using the + icon at the bottom of the copy list.
- -
- Issues with the copy not updating when you change titles (fixed 22.6).
- Series Volume disappears on save. (fixed 22.8)

Changed

- Copy notes are with the rest of Copy Information instead of in a separate tab **(7.19.10)**
- Renamed the Study Programs tab "Programs" **(7.19.10)**
- Updated the “module entry” (0 results) view to include four helpful links: Add a title, Search for items, View recently added, and View recently modified **(7.19.11)**

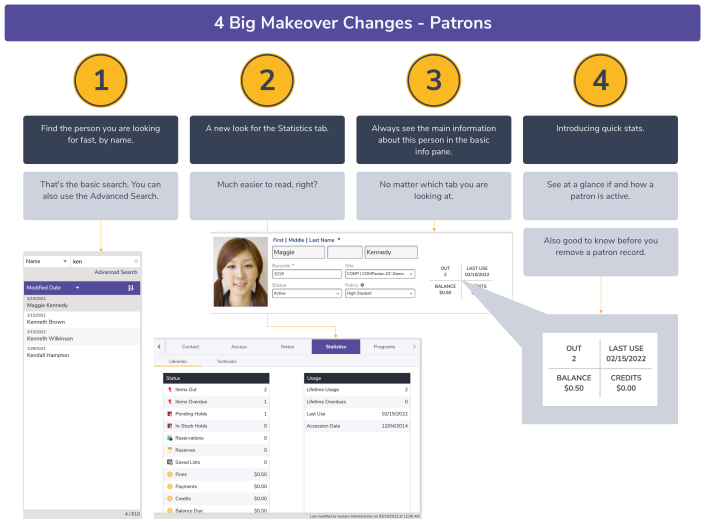
Upcoming

- Important title information is always visible at the top of the record, and additional information is organized into tabs **(betas 21.10)**
- Copies as a tab under the title record (so you can always see which title you are looking at) **(betas 21.10)**
- Split searching into basic searches and Advanced Search (search just about every field) **(betas 21.10)**

- MARC View is a quick-access toggle (Alexandria only) **(7.19.11)**
- Alert notes for Textbook copies **(20.7)**

- Select multiple records at once to export or remove **(betas 21.10)**
- !! Removed Copy ID (no longer useful) **(betas 21.10) >> Replace with Copy Tag (22.9)**
- Icons to indicate medium (Library only) **(betas 21.10)**
- Quick searches, adding, and actions buttons are at the top for easier access **(betas 21.10)**
- Return 500 records by default instead of 200 **(betas 21.10)**
- Last modified log will show the last few times the record was modified, and by whom, so you can track down any issues. **(betas 21.10)**
- Record list displays the sort field in addition to title (for example, if you sort by call number, each call number will show above the title in the record list) **(betas 21.10)**
- Indicator for Authority Controlled fields **(betas 21.10)**
- Copy Tag field for Textbook copies **(betas 22.4)**
- Copy List available in Textbook Management **(betas 22.4)**
- When adding copies, see indicators of the barcode/call number **(betas 22.6)**
- Sometimes you just need to remove a title or copy record, even if there are copies checked out, holds, etc. Now you can remove copies anyway. **(live 22.9)**
- Manually queue cover art for automatic updates or turn it off - scheduled for 22.9

Patrons Management



› Known issues (release 22.9 20230221)...

- Advanced Search has some interaction issues.
- Grade dropdown isn't working in patron information or Advanced

Search. You can still enter it manually but you can't select from the authority-controlled terms.
- Take picture wasn't working (fixed 22.9); if you try and it doesn't let you take a picture, check your browser permissions!
- -
- Merging more than 2 patron records at a time doesn't work but it looks like it does. (fixed 22.9)

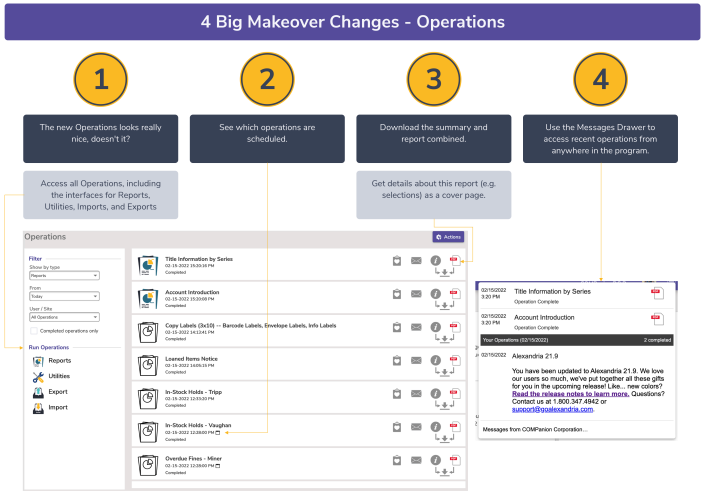
Changed

- New Nickname field **(7.19.11)**
- Updated the “module entry” (0 results) view to include four helpful links: Add a patron, Search for patrons, View recently added, and View recently modified **(7.19.11)**
- Moved Site Access, Security Group selection, and Username/Password fields to the new Access tab **(7.19.11)**
- Removed some sorting options: sequence #, username, and creation date **(7.19.11)**
- Removed some quick search options: Modified Today, Created Today, Modified in the Last Week, and Created in the Last Week (essentially Recently Created and Recently Modified, which we still have) **(7.19.11)**
- Renamed the Personal Info tab to Personal **(7.19.11)**
- Renamed the Lexile tab to Programs, which now has two sub-tabs: Study Programs and Lexile **(7.19.11)**
- Moved the Email field to the Contact tab **(7.19.12)**
- Split the email field into two: Primary Email and Other Emails **(20.1)**

Upcoming

- Important patron information is always visible at the top of the record, and additional information is organized into tabs **(betas 21.10)**
- Split searching into basic searches and Advanced Search (and you can search just about every field!) **(betas 21.10)**
- Select multiple records at once in order to remove **(betas 21.10)** or merge - scheduled for 22.9
- Patron statistics will be easier to read **(betas 21.10)**
  - Split up Librarian and Textbooks statistics into subtabs
  - Statistics no longer shows Last Modified or Current Policy because of redundancy
- The ability to remove patrons even if they have items checked out—the confirmation dialog will list the results of the removal: the items that will be declared lost, charges that will be forgiven, and credits that will be removed **(betas 21.10)**
- Return 500 records by default instead of 200 **(betas 21.10)**
- Last modified log will show the last few times the record was modified, and by whom, so you can track down any issues. **(betas 21.10)**
- Record list displays the sort field in addition to patron names (for example, if you sort by barcode, each patron's barcode will show above their name in the record list) **(betas 21.10)**
- Ascending and descending sort order **(betas 21.10)**
- Quick searches, adding, and actions buttons are at the top for easier access **(betas 21.10)**
- Quick stats is interactive! Click the different information to jump to Circulation items out or Charges, or Patrons statistics tab **(betas 21.12)**
- Sometimes you just need to remove a patron record, even if that patron has items checked out, or fines, or credits, or so on. Now you can remove the patrons anyway, and Alexandria will set their checked out items to lost, cancel their holds, and so on. **(live 22.9)**

Operations Management



› Known issues (release 22.9 20230221)...

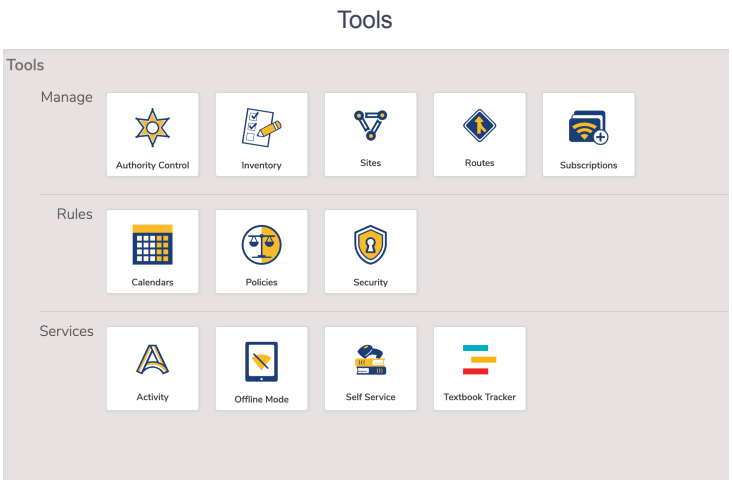
- List of operations sometimes takes a while to show.
- Opening one of the other modules from here (e.g. Reports) opens it in a new tab/window—this is intentional, although eventually we hope to keep it in the same tab!
- -
- Filter by Type doesn't always work right. (fixed 22.8)
- Completed operations aren't showing in the messages drawer. (fixed 22.9)

Changed

- Added a new dropdown that sorts operations by *My operations* or *All operations* **(20.1)**

Upcoming

- More noticeable filters **(betas 21.10)**
- Links directly to different interfaces that run operations **(betas 21.10)**
- Access your report PDFs from anywhere in Alexandria (via the topnav messages drawer) and always be notified when operations are complete **(betas 21.10...kind of) - scheduled for 22.9**
- It doesn't look so pretty, but you can pull it up on your phone and download a report! **(live 22.8)**
-



› Known issues (release 22.9 20230221)...

- Going to Calendars, Policies, Security takes you through the old Preferences interface—this is intentional, until we can rewrite these apps.
- All old interfaces will open in a new tab; this is intentional.

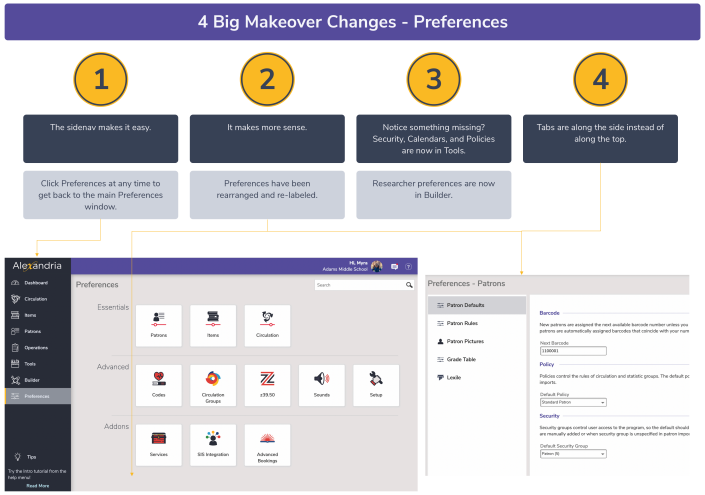
Changed

- Added a link to Offline Mode **(20.4)**

Upcoming

- Access to Calendars, Policies, and Security (which used to be in Preferences) **(betas 22.1)**
- Better categories for the different tools (Manage, Rules, and Services) **(betas 21.10)**

Preferences



› Known issues (release 22.9 20230221)...

- *In general, we recommend adjusting preferences in the old interfaces while Preferences is in Beta.*
- -
- Circulation Settings "Enable automatic email notifications" checkbox will toggle the "In Transit Features" on and off, and other weirdness. (fixed 22.7)
- Setup > Email is missing settings. (fixed 22.8)
- Services > BestMARC is missing authentication. (fixed 22.8)
- Setup > Localization > Time zone doesn't actually do anything. (fixed 22.8)
- Print Settings is currently disabled because it's not behaving. You can adjust these in the old preferences. (fixed 22.9)

Changed

- Rename "Extras" to "Services" (they aren't just 'extra', they're essential!) **(20.2)**
- New Setup area with less-common settings (keep them tidied up out of the way) **(20.6)**
- Email, LDAP, and Checkpoint ILS moved to Setup Preferences (from Admin) **(20.6)**
- SIP2 Preferences moved to the Setup area **(20.6)**

Upcoming

- More control—toggle each registered service On or Off **(betas 21.10)**
- Security, Policies, and Calendars moved to Tools **(betas 21.10)**
- z39.50 requires confirmation to reset to defaults **(betas 21.10)**
- Researcher settings moved to the Builder **(betas 21.10)**
- Essential settings reorganized to be more understandable **(betas 21.10)**

- Localization and Barcodes settings moved to the Setup area **(20.6)**

- New preference Preferences > Circulation > Circulation Rules > reservations > for **Default Reservation Period**, so you can change it from 3 days. **(betas 22.1)**
- New date/time settings with time zone and less complicated date formats **(release 22.8)**
- You can bookmark specific preferences. e.g. go to www.yourlibrary.com/preferences/patrons to jump straight to patron preferences! **(release 22.8)**
- Easier Overdrive setup with validation - scheduled for 22.10

Builder

› Known issues (release 22.9 20230221)...

- Choosing an Explore Pane and trying to view Global panes doesn't look right (scheduled 22.10)
- Log Search Queries preference isn't showing (don't worry, it's there!) (scheduled 22.10)

Changed

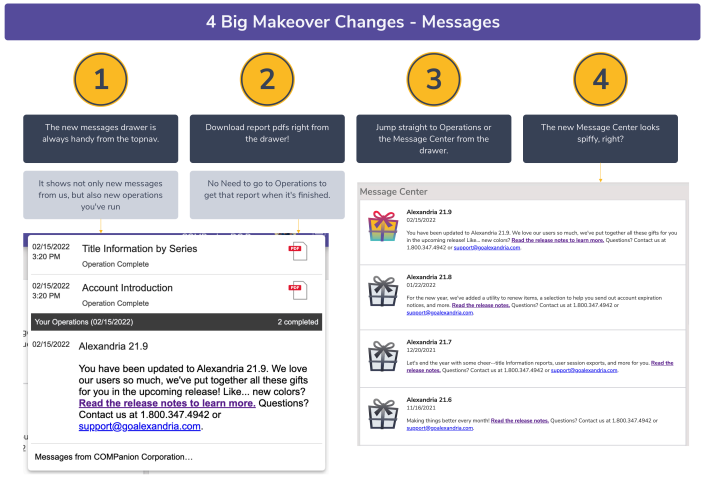
- -

Upcoming

- Brand new Builder to customize all of your patron settings **(betas 21.10)**
- Access to Bulletin Board Builder, Explore Builder, Maps, and Reviews **(betas 21.10)**
- Default Style (easy to set the same style across all patron interfaces) **(betas 21.10)**
- Easier to see global vs local Explore Panes when setting your Researcher panes

- Set all search preferences at once for all interfaces (e.g. whether or not to show study program) **(betas 21.10)**
- Easier to preview Slideshows and grab your customized URL **(betas 21.10)**
- New Kiosks area that includes Activity preferences **(betas 21.10)**

Message Center



› Known issues (release 22.9 20230221)...

- Nothing. It's obviously perfect.

Changed

- Better message storage so Message Center loads faster **(7.19.9)**
- Better icons to indicate what each message is for **(20.7)**

Upcoming

- Special sections for highlighted messages **(betas 21.10)**
- Easier-to-read messages **(betas 21.10)**
- Special messages on Dashboard and Login screen for better visibility **(betas 21.10)**
- Also, the Messages Drawer will be the best part of everything... **(betas 21.10)**

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