⚠ 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. →

🔍

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

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🖊

Frequently Asked Questions

Here are some questions we've received about the Makeover! (Other questions are answered if you look at the Changes tab and the main page!)

- What are the **User Settings**?
  - User Settings are where you can adjust the settings that are specific to your account. Turn off and on Tutorials, Reset the Tutorials, turn on/off Quick Login, and set your Default Login Site.

- How can I **contact Support** through the program?
  - Use the Help Menu and click Contact Us to fill out a form to send an email to our support team. This is also where you can go to access our Ideas Form.

- Where can I go to see information about my license, such as my **patron/item counts** and when my license expires?
  - Use the Help Menu and go to About Alexandria. This will give you quick access to information about your Alexandria, including your version, license, add-ons, and more.

- How can I **search for specific items** to make changes to the records?
  - Use the basic or advanced search at the top left of Items Management to find the records you're modifying. Once you have the record selected, use the lock icon to the top right to unlock the record and make the changes. Be sure to click Save to save the changes.
- How can I **search** for an item by ISBN?
  - In Items Management, use the Advanced Search and go to the Publication section to enter the ISBN.
- How do I **add a new copy** to an existing title record?
  - With the title record pulled up, either use the plus sign at the top right and select add copy or switch to the copies tab and use the plus sign at the bottom of your copy list, add specific copy information, and click Save at the top of the window and you're done!

- How do I access **Researcher**?
  - Researcher is accessed through Builder, then click Researcher at the top right. You can also use the shortcut from your Dashboard or the Cmd/Ctrl sh7 keyboard command. (See more Hotkeys)

Network Printer Security
Certificate Form

Password Management Best
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How helpful was this page?

Unknown macro: 'rate'

Tell us what we can improve.

Select Language

Powered by Google Translate

Save as PDF

- What is **Builder**?
  - Builder is the new hub for all of our Researcher builders and customization such as color schemes, bulletin boards, maps, etc.

- Show All isn't shown in Preferences and Tools, **how do I go back**?
  - Simply click back on the area you want to go back to on the sidenav to go back to the main preferences or tools page.

- In Patrons, can I change the information shown at the top?
  - No, the information at the top is static when you switch tabs.

- How do I change the contrast? It's very light. (e.g. the white background)
  - Check your machine or display settings.
  - *For those concerned with accessibility, please know that the Makeover complies with WCAG (Web Content Accessibility Guidelines) AA or AAA guidelines.*

- Do our previously created browser **bookmarks** need to be updated?
  - No need to modify your bookmarks, /librarian will now redirect you straight to your Dashboard.

- Where is SmartMARC located?
  - Go to your Items Management, use the lock icon to the top right, click the Add icon (+), and select Add Title.

- I have a Centralized Catalog, how can I search the full district for a title?
  - From the Advanced Search, change the Site dropdown in the Basics category to Any to search the full database.

- Is Dashboard Customizable?
  - It is! Currently, Dashboard is shared for the whole system but you can customize the buttons from Builder > Explore Builder > Dashboard. For more on customizing Explore Builder see Explore Builder.
  - Starting in version 22.12 you will be able to set your own dashboard pane in your User settings.

- How long with the legacy version be available?
  - It will continue to be available about 6–12 months after the release of 22.11 (April).

What's changing?

The Makeover includes brand new interfaces for Circulation, Patrons Management, Items Management, Tools, Operations, Message Center, and Preferences. It introduces Builder, your hub for customizing Researcher for your patrons, as well as Dashboard, a collection of widgets that show information about your library and let you jump to the functions you use most. You'll also see a consistent top bar and side navigation that allow you to navigate the program and access critical functions from anywhere. Eventually the entire program will be updated.

To read about more specific changes, check out the Changes tab. You can also look at the Overview tab for information on the Top 5 Features and Changes You Need to Know.

NOTE: The Makeover does NOT affect what your patrons see, as Researcher has not been touched as part of the Makeover.

Why is it changing?

With Version 7, which was released in 2014, we made the first big step to a modern, web-based product. But the computer world advances fast! With the Dream Makeover, we definitely want to improve how it looks and feels, but we are also updating the code to follow modern standards and be more usable on tablets and phones. This is a switch we slowly started with your Researcher interfaces back in 2015 with the release of Slideshow. And after addressing Scout, Patron Status, and Self-Service, we realized we needed to start updating Librarian interfaces as well.

When is it happening?

Betas for these interfaces have been released. This means you can switch between using the new interfaces and the old interfaces in your own Alexandria library. This will be a great time to give it a try and take a look at all of the cool new features!

See the Timeline section on the Overview tab for more information.

What new features do I get?

Check out the Changes tab for a comprehensive list of what's changed and what's new in each module. You can also look at our Top 5 Features on the Overview tab to see what we're most excited about.

In the makeover, why is the Copy ID field going away?

Copy IDs are not unique or searchable, and there is not a report that you can run which shows Copy IDs. Copy IDs have become irrelevant, and we encourage using barcodes instead.

*However we have decided to retain copy id, now called Copy Tag, to allow you to individually mark a copy.

Do I lose any functionality?

Overall, you won't! We are, however, removing some unused options and moving some things around. Check out the Changes tab to see specifics. One thing you may want to be aware of is that there will no longer be a button linking to Researcher from the Librarian side navigation. If you use this often, a quick fix is simply bookmarking Researcher on your internet browser.

Feel free to contact Support at 1-800-347-4942 or support@goalexandria.com if you feel like something is missing.

Will it cost more?

Nope! This upgrade is included in your Alexandria subscription, as long as you are current. Still on v6? Learn about switching to 7! This is also a good time to consider switching to Cloud Hosting if you don't already have it.

Is the new interface easy to learn for non-tech people?

We think so! With the addition of new in-app tutorials, What's New highlights, and rollover help text information, we think learning the new interface will be a breeze. And, you'll have videos and our 247/365 Support available to help you along the way.

Can I get any training?

Yep! If you missed the webinar, you can watch it now, and see all the videos on our YouTube channel. We will also be hosting a free Q&A webinar. You can also purchase additional training by contacting our sales team at 1-800-347-6439 or sales@goalexandria.com.

Can the beta version be used for work in our collection?

Yes they can! From the old Circulation, Items, or Patrons, click on the purple warning icon on the top right. This will open the beta for you to work in. If you find any issues, please send them to uxteam@companioncorp.com!

Where can I access reports?

Reports are accessed from Operations.

Can I forgive only a portion of a charge in the new interface?

You can! The checkbox makes it easy to forgive an entire charge all at once, but you can easily forgive only part of the charge by unchecking "Forgive Remaining Balance," and select "Forgive as a Payment Option" method. Enter how much of the charge you'd like to forgive, and click Process.

Is there a shortcut list somewhere handy?

Yes! Our printable System Hotkeys Reference is in our Support Center Getting Started Resources, and has been updated. Also, you can find ALL shortcuts on the Hotkeys page. These have been updated.

Not changed in the Makeover...

- How can I see all the items a patron has checked out in the Items Out tab in Circulation?
  - Use your mouse to scroll down to see the full list.

- How can I access Inventory Management?
  - Inventory Management can still be found under Tools.

- When entering a homeroom in Patrons Management there is a list that comes up, where is that list pulling from?
  - The Homeroom or Location field is an authority-controlled term. To view or modify the list, go to Tools > Authority Control > Patron > Homeroom.
- How can I edit a copy record to have a different call number than the title record?
  - You will need to make the changes on the call number filed on the copies tab within the item record.

In Charges, if a Patron has multiple charges, can I pay them all at once and print a single receipt?

You can pay multiple charges at once, but they will have separate receipts.

Is there a way to change the copy status from Items Management?

No. You will need to us the System Patrons in Circulation to change copy status.

Can I search for items added on a specific date?

Yes, you can specify the date added in the Advanced Search> More.

How do you add Title cover art?

With the image saved to your computer, you can either drag and drop the image into the cover art space, or use the + icon and choose a file from your device.

How do you clear the current Patron?

From Circulation, use the X command to clear the current Patron and Item panes. More information can be found HERE.

Not related to the Makeover...

- Can patrons see what they have checked out in self-service?
  - Not at this time. If this is something you would like to see, please fill out our ideas form at https://www.goalexandria.com/ideas
- When adding certain information for patrons, an autofill list appears. Can we turn that off?
  - The autofill list is coming from your Authority Control there is no way to turn the feature off. You can use Authority Control to clean up your terms.
- How do we change the font to be bigger?
  - The size of your screen is directly related to your browser zoom. Use Cmd/Ctrl + or check your browser settings to zoom in.
- How can I add different icons to Explore Builder?
  - Drag and drop icons in the Explore pane you want to modify. For more on customizing Explore Builder see Explore Builder.

Are any changes being made to Researcher?

Not at this time. If there are ideas you want us to implement into researcher, please submit them here: https://www.goalexandria.com/ideas

Are the reports changing?

No. Over the last several months, we have been working on improving and consolidating the reports–but any of those changes are outlined in the release notes. The functionality of the reports will not change in the makeover.

Will Patrons be able to be added from our Student Information System?

You can add patrons from your SIS by running a Patron Import or with our SIS Integration.

Where do the Advanced Bookings reports go?

You can access Advanced Bookings from Circulation. Any reports you run can then be accessed in Operations.