



User's Manual

For Macintosh and Windows

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Alexandria Controller User's Manual—David Scott Forsythe
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Welcome to the Alexandria Controller!

Now, with the Alexandria Controller, the technical staff, district administrators, and librarians can have a system that meets all of their collective needs.

Multi-Data Station technology saves time!

Running numerous Data Stations on a single server saves your information technicians time. Instead of having to go from school to school to maintain individual library systems, all Alexandria Data Stations can be housed on a single server. This server may be located in a district location rather than a school. This enables the technical staff to have easy access to the server and to save travel time as well as the maintenance time required when multiple servers are needed.

Fewer machines saves money!

Purchasing fewer servers will save the district money and provide a more cost-effective use of technical staff—circumventing the need to hire additional technical support.

Librarians retain autonomy!

Librarians will be able to customize their library systems and services to best serve the needs of their students and staff. Policies, purchases, etcetera, will be made on the local level for a better, more individualized service.

Each collection is completely autonomous and will be managed and searched separately, just as if they were separate servers running on separate machines.

Installing Alexandria Controller

This section will help guide you through the Alexandria Controller installation process.¹ Make sure to have the registration letter that came with your software—it contains essential product code information required during installation.

If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service at (800) 347-4942 or (801) 943-7277 or by email via: support@companioncorp.com

Hardware and Operating System Requirements

The Alexandria Controller has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle differences between the controls at the tops of windows and minor differences in operating system functionality, the program operates identically across both platforms.

Here are the minimal hardware and operating system requirements for an Alexandria Controller:

System Requirements for Alexandria Controller

Minimum	Recommended
Mac OS 10.4, Windows 2000+	Mac OS 10.4 Server, Windows 2000 Server
G5 or X86, Dual Processor/Core	G5 or X86, Dual Processor/Core
2GB of RAM	4GB of RAM (or more)
20GB of free HD/100,000 Items	20GB of free HD space/100,000 Items
TCP/IP Network	TCP/IP Network

Alexandria Controller Communication Systems

The Alexandria Controller requires TCP/IP to communicate between managed Data Stations and their clients.

! W A R N I N G !

The address for each Alexandria Data Station cannot be dynamically allocated and *must* have a fixed TCP/IP address.

¹.During instruction, COMPanion assumes that you have a *basic* working knowledge of your computer's operating system.

Installation Summary (*read this first*)

Make sure that the machine on which you will be installing and running the Alexandria Controller meets the minimum recommendations for both hardware and operating system software.

- Step 1. Before you run the Alexandria Controller, you will need to have a unique and static IP address assigned to *each* collection or Data folder that you wish to manage—including an additional IP for the Controller component itself. You can configure and add additional IP addresses to your existing (or secondary) ethernet controller using your operating system's standard network settings.

On Windows, these settings can be found under the Internet Protocol (TCP/IP) connection properties for your network connections. On Macintosh these settings can be located and configured from your Network system preferences.¹

The Alexandria Controller *does not* need to be restarted in order to find IP addresses that were newly added using your operating system's network configurations.

- Step 2. Download the most current version of the Alexandria Controller (www.goalexandria.com). COMPanion's Technical Support staff recommends that this file be saved to your operating system desktop.
- Step 3. Run the Alexandria Controller installer by double-clicking on the **Installer.exe** executable (Windows) or the **Installer.dmg** disk image (Macintosh).² To proceed with the installation of the Controller, follow the on-screen prompts and accept the terms of the COMPanion Corporation Electronic End User License Agreement.
- Step 4. After completing the installation, close the installer application (if applicable) and launch the **Alexandria Controller** by double-clicking on the newly created desktop shortcut. Alternatively, you can open the Alexandria Controller's program folder (i.e. installation directory) and launch it from there.

On Windows, the Alexandria Controller executable will be located, by default, at:
Hard Drive (*typically C:*) > Program Files > Alexandria Controller

On Macintosh, the Alexandria Controller application package can be found at:
Hard Drive > Alexandria Controller

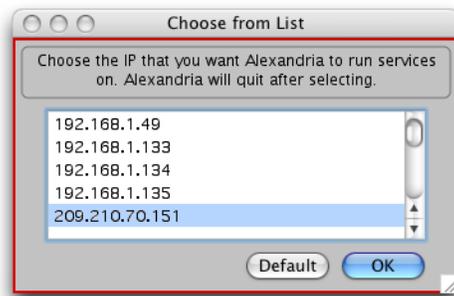
Make sure that any other COMPanion software applications that may be running on this machine (e.g. Textbook Tracker, eLunchroom) have been shut down before attempting to run the Alexandria Controller.

1. If you are inexperienced with TCP/IP protocols, please have your Information Systems Technician (*or Information Technician; IT for short*) set up multiple IP addresses—one for each data set. Otherwise, feel free to call COMPanion's Technical Support team at (800) 347-4942 or (801) 943-7277 or by email via: support@companioncorp.com.

2. These files will most commonly be called **Alexandria Controller Installer.exe** and **Alexandria Controller Installer.dmg**.

Assigning the Controller an IP Address

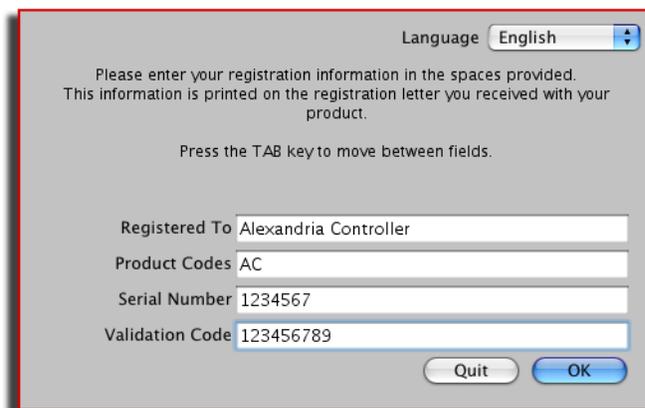
The first time you launch the Alexandria Controller, you will be asked to select the IP address that you wish the Controller to permanently use.



Select the desired address from the **Choose from List** window and then click **OK**.

Registering the Controller

Proceed to register the Alexandria Controller using the information provided on the product registration letter that came with your program. Enter the **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.



After the successful entry of your registration codes, you will be presented with Alexandria Controller's user interface (*documented on page 12*).

- N O T E -

The first time that you launch the Alexandria Controller, a series of progress bars will appear at the bottom of the interface while the program rearranges some essential client resources and builds client applications. Please allow these processes to finish before proceeding. After these utilities have completed, you are ready to import existing or create brand new data collections.

Adding or Creating Alexandria Data Stations

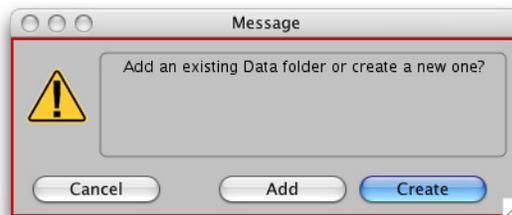
There are two methods available for importing an existing Alexandria Data folder into the Controller.



TECH NOTE:

Alexandria Controller creates a new “.acf” file in the Client Applications folder for each new Data Station you add.

When a Data Station’s IP address is changed, it’s “.acf” files are



First, you may drag-and-drop an existing Data Station’s **Data** folder onto the main Controller window; otherwise, you can click the **Add** button on the main Controller window. Clicking this button will give you the choice of adding an existing Data folder or creating a new one. If you choose to **Add** an existing Data folder, a standard operating system explorer (i.e. finder) window will appear, allowing you to guide the Controller to the directory folder containing your existing data collection.¹

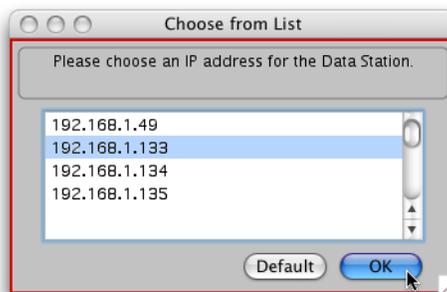
If you choose to **Create** a new Data folder set from scratch, you must be prepared to complete the required registration information for the newly created Data Station. Attempting to add a Data set whose **Serial Number** already matches that of a Data Station managed by the Controller will cause a warning message to appear.

Before the final importation/creation of new data can be implemented, you will need to select a static IP address for every individual Data Station—just as you did for the Alexandria Controller (*see page 5*).



NOTE:

Once registered, the Alexandria Controller will omit its own IP address from the **Choose from List** window as a viable option.



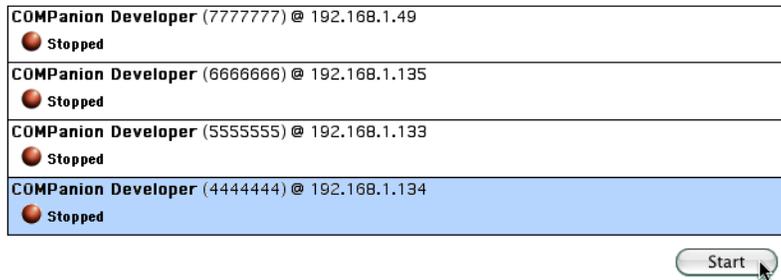
Select the desired address for the new Data Station from the **Choose from List** window and then click **OK**. Otherwise, click **Cancel** to return to the main Alexandria Controller interface window.

Now that you’ve added a new Data Station, the *first* thing you should do is **Edit [that] Data Station’s Preferences** (*see page 17*) and add your administrative-level users so that they can remotely install client workstations; also, if required, you can change your Data Station’s available web ports. Please refer to the v5.5 *Alexandria User’s Manual* for more information on creating users and changing ports.

¹The Alexandria Controller *will not* move an existing Data folder. Instead, a copy of the selected Data folder is made so that your original collection information is left untouched. The Alexandria Controller is able to work around set file permissions; the Controller can copy *any* application bundle, even when it’s set to **Read only**.

Activating Alexandria Data Stations

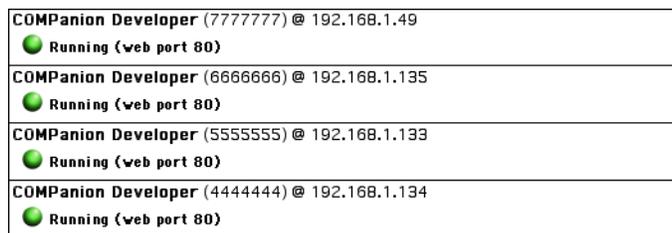
The Alexandria Controller has the ability to **Start** and **Stop** the individual Alexandria Data Stations that it manages. When you **Add** an existing or **Create** a new Data Station, they will initially appear as **Stopped** in the main Controller interface window.



From the list, select (highlight) the Data Station you would like to activate and click the **Start** button.

You are only allowed to activate *one* Data Station at a time. However, if the Alexandria Controller is shut down and then restarted, all of the individual Data Stations will be automatically activated.¹ If, for some reason, one of your Data Stations fails to auto-start on launch, an “unable to start” error message will be recorded in the log.

Once a Data Station in your list has been activated, you should see a green-colored icon and the word **Running**, along with the web port that it's using, located under the name of the collection.



At this point, an activated Data Station is broadcasting—awaiting web connections on **Web Port 80** (*set as default*), and ready to communicate with your Alexandria client workstations.²

- N O T E -

As stated on the previous page, the *very first* thing you should do after adding and activating a new Data Station is edit their essential **Preferences** (*see page 17*). Please refer to the v5.5 *Alexandria User's Manual* for detailed preference information.

1.This can be overridden if you hold down the <shift> key while launching the Alexandria Controller.

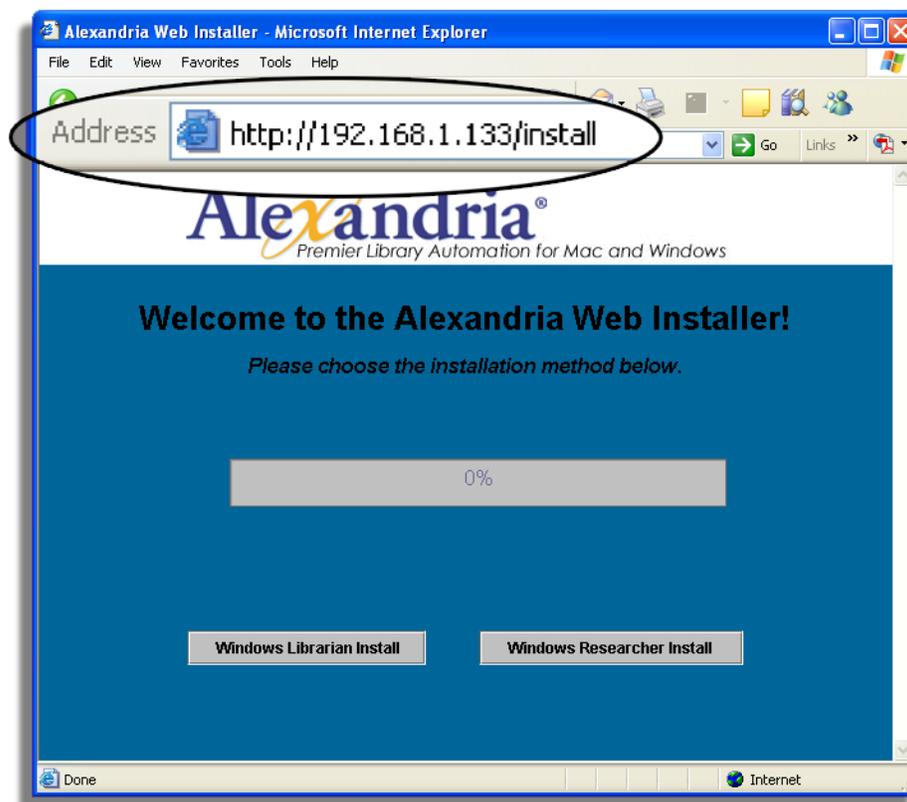
2.The Alexandria Controller acquires root privileges before it launches each Data Station so that it can listen on restricted ports.

Installing Client Workstations

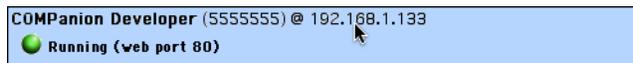
If an individual Data Station license supports multiple users, you can install Alexandria's Researcher and Librarian clients on remote computers over the World Wide Web.

In order to install clients over the World Wide Web, make sure that you have an **Administration User Name** and **Password** set up in the **Administration** preferences of your selected Data Station. You must also have the latest **Java** applet installed on your computer. If you don't, the following steps will instruct you on download and installation procedures.

- Step 1. Make sure that the **Data Station** from which you'd like to install the client is **Running** (i.e. activated) in the Alexandria Controller management list.
- Step 2. Open an internet web browser (e.g. an Internet Explorer, Firefox, or Safari web-browsing window) on the machine where the client is to be installed.
- Step 3. In the browser's **Address** field (located in the upper-left corner of the window), type the IP address of your Alexandria Controlled Data Station followed by `"/install"`.



If you are unsure which IP address your Data Station uses, it can be located to the right of the **Registered To** name and **Serial Number** in the Alexandria Controller management list.



If you *still* have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact the COMPanion Technical Support team.

- Step 4. If you performed that step correctly, the **Alexandria Web Installer** page should appear.
- Step 5. If you don't have the correct **Java** applet installed on your computer (in this case, **Java Plug-in 1.3** or higher), you will be required to install it before you can download clients. Your browser should automatically detect whether you have the correct Java version installed. If it does not, follow the links and install instructions that the web page provides.
- Step 6. If your **Java** plug-in is up-to-date or you have just installed it, click the **Grant this session** button on the Java page to begin your **Web Install** session. You are allowed to download a **Windows** or **Macintosh Workstation**.





NOTE:

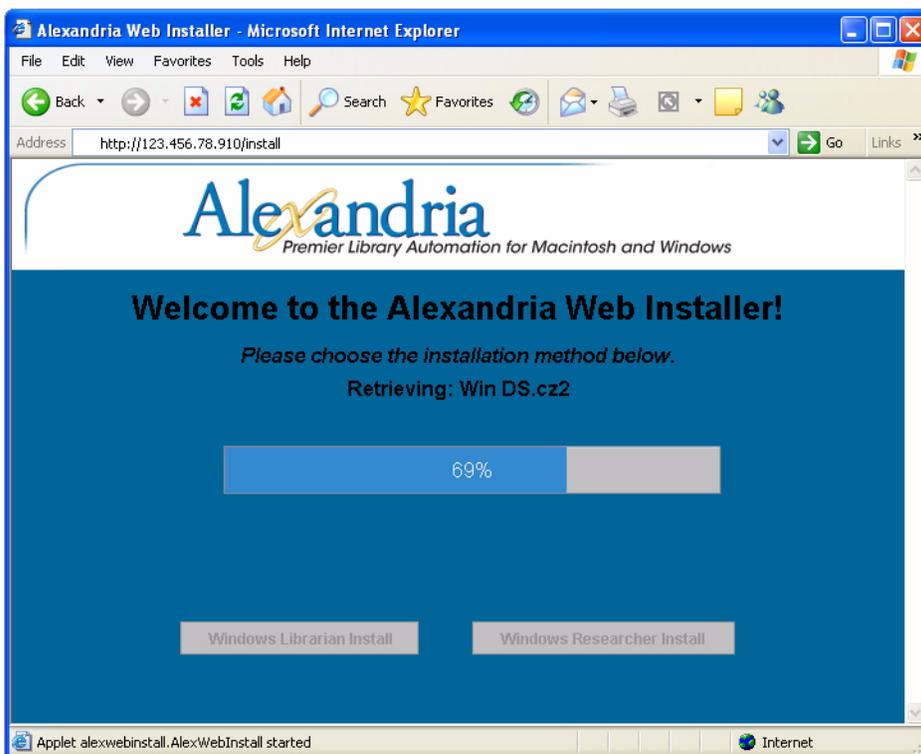
The very first thing you should have done after adding a new Data Station to the Controller is to use the Edit Data Station's Preferences (see page 17) menu selection to add your administrative-level users.

Please refer to the v5.5 *Alexandria User's Manual* for more information on creating users

Step 7. A pop-up dialog box will require you to input your Login User Name and Password. Your user name and password are the same as those that are found on the Administration preferences window of your Alexandria Controlled Data Station (see note in margin).



Step 8. The client application will be downloaded to your machine. After it has finished downloading, an Alexandria folder will appear on your operating system desktop with the appropriate application files inside (this folder can be moved anywhere on your machine, it's only downloaded to the desktop to make it easier to find).



Manual Installation of Client Workstations

Alternately, **Researcher** and **Librarian** workstations can be installed manually by moving a copy of the client application to a permanent location on the hard disk drive of the machine where it is to be installed. These client applications can be found in the **Alexandria Controller Support** folder.

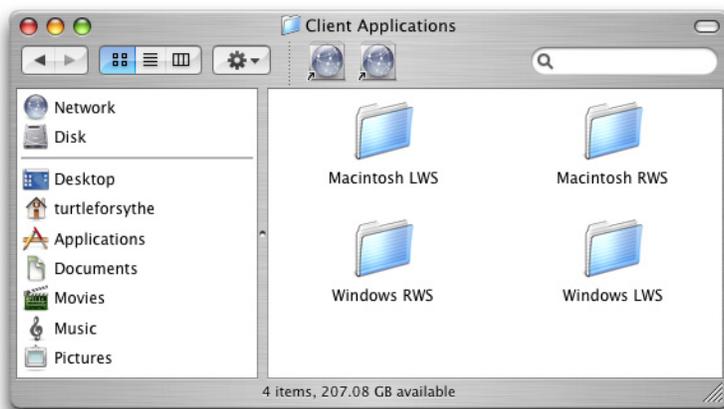
On Macintosh OSX machines, this folder is located in the following directory:

Hard Drive > Users > Shared > Library > Alexandria Controller Support

On a Windows machine, the shared application folder should be kept here:

Hard Drive (*typically C:*) > Program Files > Alexandria Controller

You can locate the **Librarian** and **Researcher** workstation installers in the **Client Applications** folder. Be sure to copy the *entire* folder for each client you wish to install.



- N O T E -

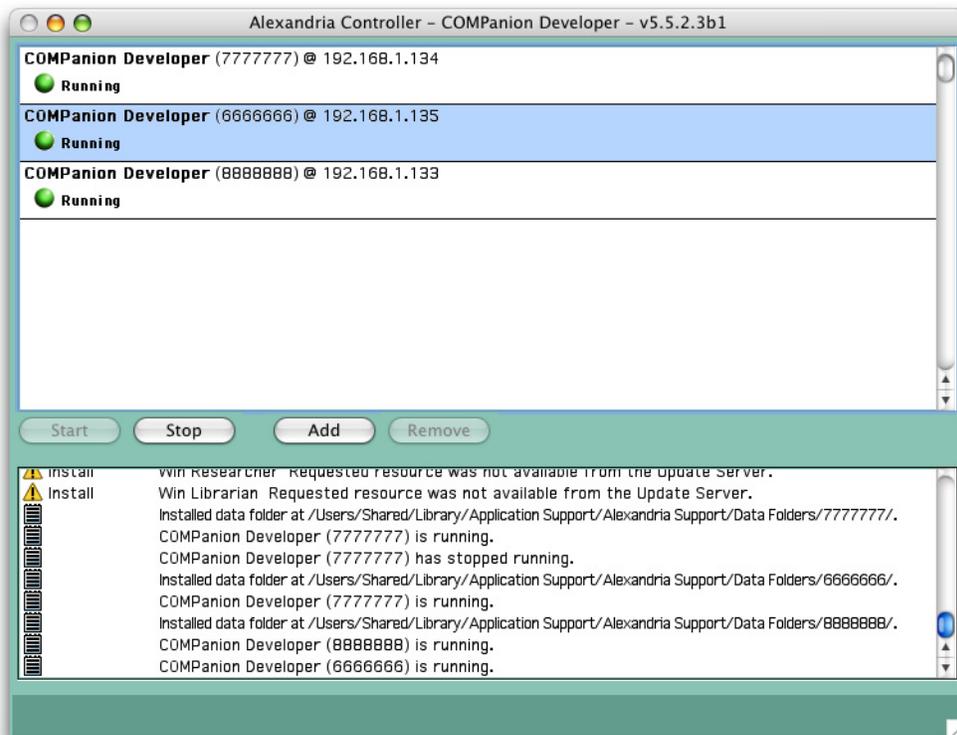
When a Data Station is running under the Alexandria Controller, be aware that you will need an **Administrator Username and Password** when installing or configuring new client workstations.



The Alexandria Controller Interface

Now that you've added all of your managed Data Stations and installed all of your client workstations, the Alexandria Controller is fully operational and ready to go!

Now, let's delve a little deeper into some of the more technical details of the Controller and its interface.



The main Controller interface window is easily broken down into two distinct sections.

The top half of the main Controller window contains your list of managed Data Stations. This list contains information about which Data Stations are active or stopped, their names, serial numbers, IP address, and port numbers.

The list of managed Data Stations can be rearranged and reordered by selecting (highlighting) the desired Data Station and dragging it above or below other existing Data Stations.

You may right-click (Windows) or `<ctrl>-click` (Macintosh) on any Data Station in this list to open the Controller menu (see *“Controller Menu” on page 17 for more information*). The Controller menu allows you to Add or Remove a Data Station, assign an IP address, or edit the Data Station's preferences.

If you select (highlight) a specific Data Station from the list, it will turn blue—allowing you to use the **Start** button to activate the Data Station (if it is stopped) or use the **Stop** button to deactivate a Data Station (if it is running).

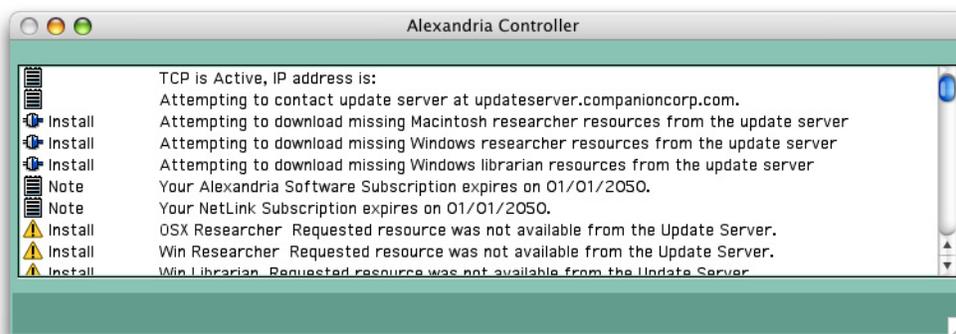


You may also click on the **Add** button, causing a message window to appear. You will be given a choice to **Add** a new Data folder or **Create** a new one. If you wish to do neither, click **Cancel**.

For more information on importing or creating new Data Stations, please review “Adding or Creating Alexandria Data Stations” on page 6.

The Controller Log

The bottom half of the main interface window contains the controller log. The controller log captures and stores all pertinent Controller information, including when each Data Station is stopped or started, and any special operations (e.g. archive or rebuild) that have been performed.



While in this section, you may select **Print** from the **File** menu to print the log. The controller log is automatically saved by the Controller. Logs are saved inside the **Log** folder, located in the **Alexandria Controller Support** program directory.

Alexandria Controller Menus

The Alexandria Controller menus follow operating system standards for Macintosh and Windows. For example, the File and Edit menus in Alexandria Controller are very similar to the File and Edit menus in other applications. Additional menus have purposes specifically related to Data Station management.

Alexandria Controller/Help Menu

If you are using Macintosh, there is an **Alexandria Controller** drop-down menu that contains the **About Alexandria Controller** and **Quit Alexandria Controller** selections. There is also a **Help** menu that contains **Alexandria Help** and **Open Release Notes** selections.

On Windows, all these selections are located under the **Help** menu.

About Alexandria Controller

Shows copyright and version information.

Alexandria Help

If the **Controller Help** documents are installed on your system, this menu selection opens them.

Open Release Notes

If the Alexandria Controller release notes are available, this menu selection will display them.

Quit Alexandria Controller

Quits the Alexandria Controller program.



File Menu

The Alexandria Controller **File** menu provides the following selections.

New Document—Opens a new COMPedit document. COMPedit is the Alexandria Controller's integrated word processor.

Open—Opens the standard operating system explorer window used to locate files. When you select a document from this window, the Controller will open it (if it is able). Use this command to open COMPedit documents, TEXT documents, and other files for viewing.

Close Window—Closes the top window.

Close All—Closes all windows except for the main Controller interface window.

Save—When enabled, saves the contents of the top window.

Save As Text—Saves a copy of the currently visible COMPedit document as a TEXT file.

Save As RTF—Saves a copy of the currently visible document in a rich text format¹.

Save As—Allows you to save “.vwp” documents to specific locations on your hard drive.

Revert—Changes made to the current document are discarded and the original document is displayed in the COMPedit word processor.

Utilities—Utilities are used to check for updates and download the newest resources for your Alexandria Controller (see “*Alexandria Controller Utilities*” on page 36).

Page Setup—Operating system standard function that sets the page up for printing.

Print—Prints the contents of the COMPedit window or any other window that has focus.

Print to PDF—This allows you to save any finished reports or COMPedit documents as Adobe PDF files (Macintosh only).

File	
New Document	⇧⌘N
Open	⌘O
Close Window	⌘W
Close All	⇧⌘W
Save	⌘S
Save As Text	⇧⌘S
Save As RTF	
Save As	
Revert	
Utilities	
Page Setup	
Print	⌘P
Print to PDF	⇧⌘P

¹An RTF file is basically just an ASCII file with special commands to indicate formatting information, such as fonts and margins.

Edit	
Undo Typing	⌘Z
Can't Redo	⇧⌘Z
Cut	⌘X
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Find	⌘F
Find Again	⌘G
Paste From File	
Preferences	⌘;

Edit Menu

This menu includes standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to the Alexandria Controller are included below.

Undo Typing—This command only undoes typing or cut-and-paste operations in individual fields or in the word processor. It does *not* undo operations from other menus, commands and controls.

Redo/Can't Redo—An undo for the undo.

Cut, Copy and Paste—You can cut, copy, and paste text from certain fields to others within the Alexandria Controller.

Clear—Clears the selected text or selected list elements.

Select All—Selects all the text in the current edit field, current word processor document, or list.

Find—This selection opens the Find window. Dependant upon which window is open, Find can be used to locate specific information or text in a word processing file.

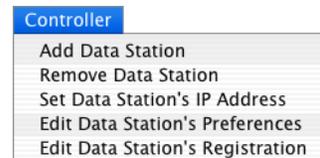
Find Again—Finds the next piece of matching information in a COMPedit document.

Paste From File—Allows the user to paste information from a file.

Preferences—This selection opens the Preferences window. Preferences are used to customize the Alexandria Controller to suit your needs (see *"Alexandria Controller Preferences" on page 19*).

Controller Menu

This menu only appears when the main Alexandria Controller interface window has focus. You can also right-click (Windows) or <ctrl>-click (Macintosh) anywhere on the Controller interface window to force this menu to appear.



Add Data Station—This selection does the same thing as clicking the **Add** button on the Controller's main interface window (see *"Adding or Creating Alexandria Data Stations" on page 6*).

Remove Data Station—This selection does the same thing as clicking the **Remove** button on the Controller's main interface window. If you have a Data Station selected (highlighted) in the management list, this selection will become available.¹ Use caution; once you've removed a Data Station from the Alexandria Controller, it *can not* be restored.

Set Data Station's IP Address—If you created a new Data Station but had no IP addresses available during its inception, the Data Station will still be added to the Controller list. However, it will appear as **Stopped** until you've supplied it with a working IP address.

Once you've set up additional IP addresses using your operating system's network configuration tools, you can use this selection to assign the highlighted (selected) Data Station one of the newly created IP address (see *"Adding or Creating Alexandria Data Stations" on page 6*).

If only one IP address is available, the Controller will automatically skip the **Choose from List** window and assign the last remaining IP to an addressless Data Station.

After the Data Station has been assigned an IP address, it is immediately activated.

Edit Data Station's Preferences—The Alexandria Controller is allowed to edit the preferences of every Data Station it manages. After a Data Station is up and **Running** in the Controller's management list, you may choose to remotely edit *all* of that Data Station's Preferences. The Controller will ignore the Data Station's auto-save settings when its preferences are being edited.

Because Alexandria Data Station preferences are too abundant to mention here, please refer to the v5.5 *Alexandria User's Manual* preference chapters for complete and detailed descriptions.

Edit Data Station's Registration—This will open the Data Station's **Registration** window, allowing you to update your registration information. The Alexandria Controller will require a restart once your registration information has been updated.²

- N O T E -

Some of the selections in the Controller menu (e.g. **Remove Data Station** or **Edit Data Station's Preferences**) will appear grayed-out and disabled until you have **Stopped** the selected Data Station from running.

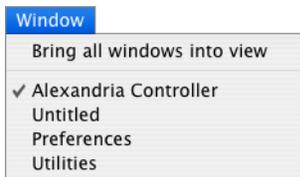
1. The **Remove Data Station** selection is disabled until the selected Data Station you wish to remove has been **Stopped**.

2. This menu selection will only become available after you've **Stopped** the selected Data Station from running.



Show Menu

Use this menu to move between various Controller modules (if available).



Window Menu

As you open new windows in the Alexandria Controller, the **Window** menu will display a list of all currently active windows. The example **Window** menu in the margin shows that the **Alexandria Controller** window is open and active and the **Preferences** and **Utilities** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

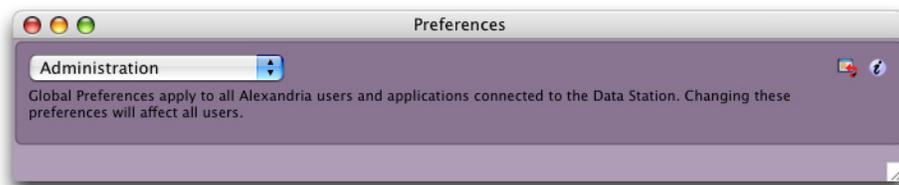
If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the Controller's main interface window.

When you close a window, it is removed from this menu.

Alexandria Controller Preferences

Although you're required to make changes to the individual Data Station preferences that your Alexandria Controller manages—the actual Controller *also* contains some preferences of its own. However, these preferences are limited to just a few panes containing globally-based settings.

The Alexandria Controller's Preferences are used to customize security settings, email information, and scheduled events for all managed Data Stations.



Edit	
Undo Typing	⌘Z
Can't Redo	⇧⌘Z
Cut	⌘X
Copy	⌘C
Paste	⌘V
Clear	
Select All	⌘A
Find	⌘F
Find Again	⌘G
Paste From File	
Preferences	⌘;

The top portion of every preference window consists of a drop-down menu and two standard Alexandria Controller buttons. The drop-down menu on the left is the Preference selection menu. Use this menu to shuffle through Alexandria Controller's various preference windows. For more information on an individual Controller preference window, please review its corresponding section in this document.

On the far top-right of every preference window are two Alexandria Controller standard buttons. The first button is a preference specific Restore/Revert button. This button will restore the Alexandria Controller preference windows to its original settings; reinstating any information or fields that were supplied via registration codes.

The second button is the Alexandria Controller standard Help button.

The sections that follow will describe, in detail, each preference window and then demonstrate how to use them.

To set up or change Alexandria Controller preferences, you must first activate the Preferences window from the Edit menu. You may also use the "Ctrl+;" (Windows) or "Command+;" (Macintosh) shortcut command. Once the Preferences window appears, click on the drop-down menu in the upper-left corner of the window to view your available preferences.

- N O T E -

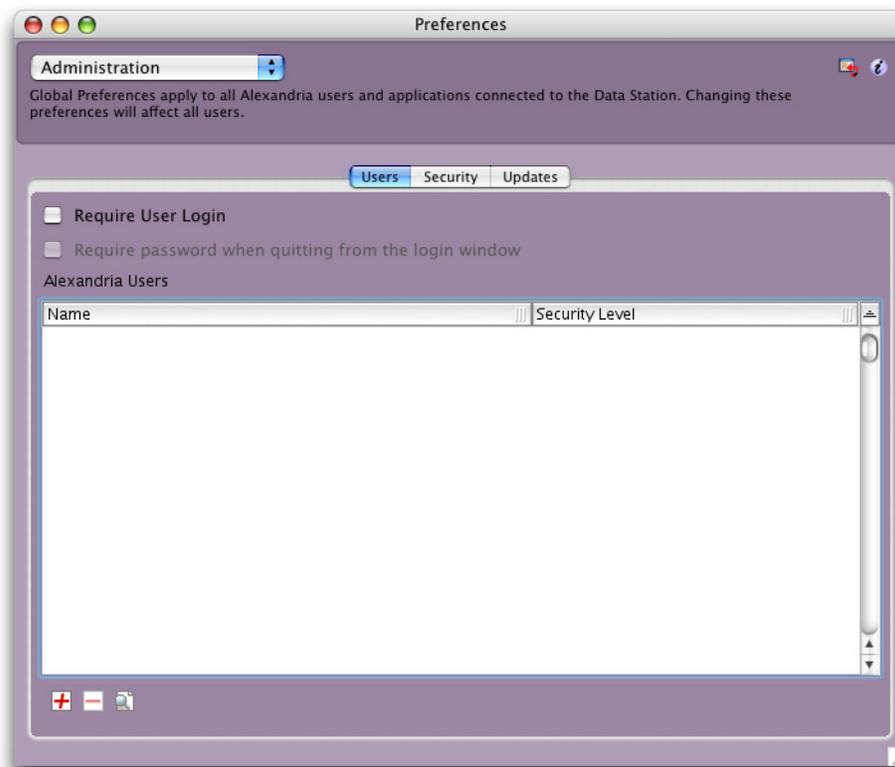
Since the Alexandria Controller and Web Router only contain global-based preferences, they will not show Local/Default Local drop-down menus.

Administration Preferences

Set up Alexandria Controller users and access levels; activate passwords.

Users Tab

The Users tab of the Administration preference window allows you to setup and create any number of Alexandria Controller users, each with their own unique (or identical) security level. Although you may have users with duplicate security levels, you can not have duplicate user names.



This window contains a large Alexandria Users field, which is basically a list that contains the Name and Security Level(s) of your existing Alexandria Controller users; you may select (highlight) any of the users contained within this field in order to edit their information or remove them completely.

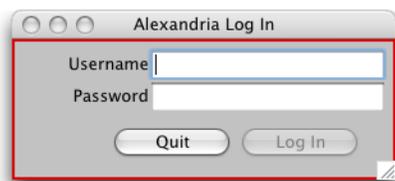
This preference tab also contains the Add User, Remove User, and Edit User buttons (located at the bottom-left corner of the window); these buttons allow you to create, remove, and edit Alexandria Controller users. The subsequent pages will further detail the usage of these buttons.¹

1. For more information on Security, please see "Activating Security" on page 21.

Activating Security

Check the **Require User Login** box on the **Administration Users** preference window to activate the Controller's **Log In** security. When this box is checked, the Alexandria Controller will require a username and optional password¹ every time that the program is launched.

Even if you haven't yet logged in, the Alexandria Controller will be running from the moment you see the **Alexandria Log In** window—all Data Stations will have already been activated.



Use the **Require Password to Quit From Log In Window** checkbox to force users to provide an acceptable password when attempting to **Quit** from the **Log In** window.

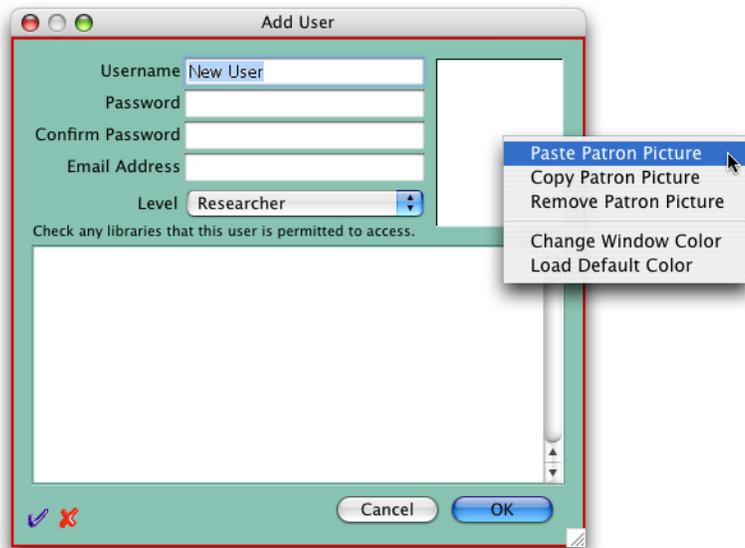
When the **Alexandria Controller Log In** window appears, enter the appropriate **Username** and optional **Password** and click **Log In** to access the Alexandria Controller.

The username that you enter during log in will be recorded to the **Controller log** as well as any failed login attempts.

¹.If a password was not supplied when creating a new user in the **Add User** window (page 22), then this field will not be required.

Adding Users

Click the **Add User** button (the red “+” icon), or use <cmd+N> (Macintosh) or <ctrl+N> (Windows), to add a new user to the Controller. The **Add User** window will appear, requesting that you provide specific new user information.



Enter the username¹, a password², confirmation password, email address, security Level for the new user. If you have not previously created any users, the Level drop-down menu will be set to **District Administrator** and you will be unable to change it. Once you have created a **District Administrator**, you can add other new users with access levels other than **Administrator**.

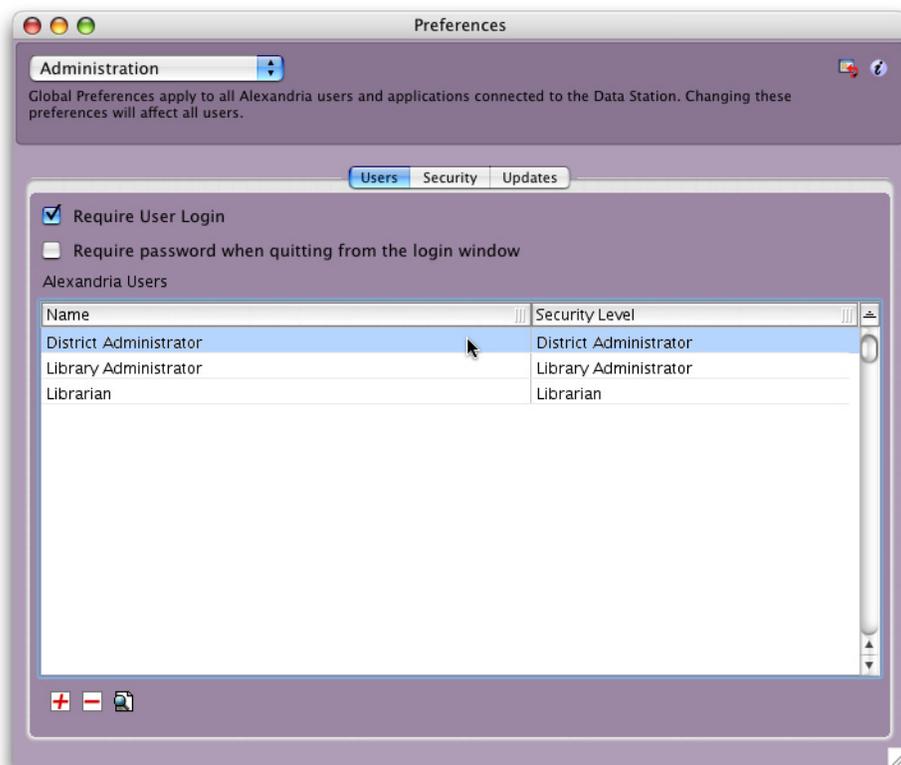
If you would like to add an user’s picture at this time, you can import a GIF, BMP, PIC, JPG (or any other standard image file); here are some ways that you can do this:

Drag and drop—Open the picture with your system’s default picture viewer. Drag the graphic from the desktop or program onto the Controller’s **Add User** window. As you drag the picture, a box outline shows where the picture is to be placed to help you align it properly.

Paste and Copy User Picture³—Open the picture with your system’s default picture viewer. Select the graphic and copy it to your operating system clipboard (this is usually done with commands such as **Select All**, **Copy**, and **Cut** under the **Edit** menu in the program). Go back to the Controller’s **Add User** window and choose **Paste Patron Picture** by right-clicking (or ctrl-clicking using a one-button mouse) in the patron picture field. The picture should now appear in the area located to the right of information fields.

1. If you choose a username that is already in use, the Controller will ask you to choose another.
 2. Passwords are *not* case sensitive. Upper and lowercase characters match. Although you may leave the Password field blank (meaning that a user requires no password upon Log In), it is *strongly* recommended that this is *not* done.
 3. Windows users are required to have Apple’s QuickTime installed to view some picture formats.

When you click the OK button, the new user Name and Security Level will appear in the Alexandria Users field of the Users tab.



Removing Users

To remove an Alexandria Controller operator, select (highlight) the user Name from the Alexandria Users field and click the Remove User button (the red “minus” icon). If you have Alexandria Users with security levels other than Administrator (e.g. Librarian or Aide) you will be unable to remove the District Administrator unless you have another existing District Administrator.

Edit Users

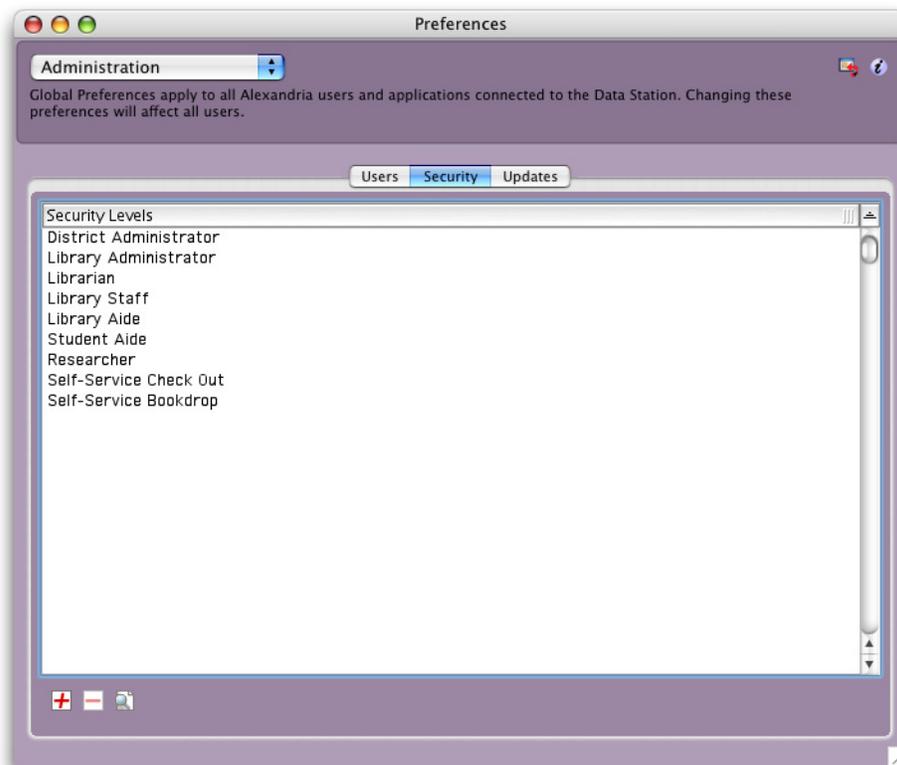
You may edit the username, password, email address, and security level of any existing Alexandria Controller user. To edit an existing user’s information, double-click on a user’s name in the Alexandria Users field. Alternately, you may select (highlight) the user’s name from the Alexandria Users field and click the Edit User button (located at the bottom left-hand side of the window). Doing this opens the Edit User window (similar to the Add User window described on page 22); using this window, you may change any of the user information fields.

**NOTE:**

Username and passwords are not case sensitive.

Security Tab

The options contained on the Security tab of the Administration preference window allow an administrator to modify existing or create custom security levels for Alexandria Controller users. A user's security level determines what Alexandria Controller operations the user is allowed to perform.



The Alexandria Controller comes standard with several default security levels; from **District Administrator** to **Researcher**, including two **Self-Service** security levels. **District Administrator** is the least restrictive and allows unlimited access to Alexandria Controller preferences and settings. **Researcher** is the most restrictive security level.

Alexandria Controller also allows users to create their own custom security levels by manipulating a list of permissions (*see page 25 for more information on customizing security levels*).

Until you set up a **District Administrator** user and enable **Require User Login**, Alexandria Controller will launch with full administrative privileges. An **Administrator** is the only security level that allows you create new Alexandria Controller users. Once you've established an **Administrator**, if no other security level is selected, then **Administrator**-level access will be the default upon launch.

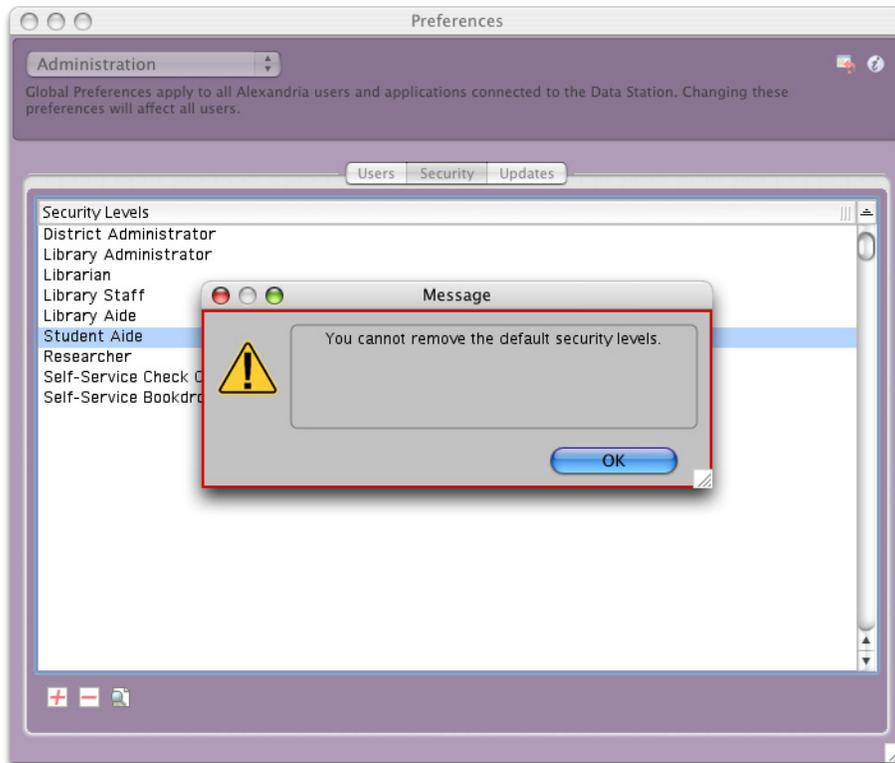
Adding, Editing, and Removing Custom Security Levels

Users with the appropriate authority can add, edit, or remove any of Alexandria Controller's security levels with the exception of the default security levels, which *can* be edited, but *not* removed or renamed.



NOTE:

By default, only the District Administrator can add custom or edit existing security levels.



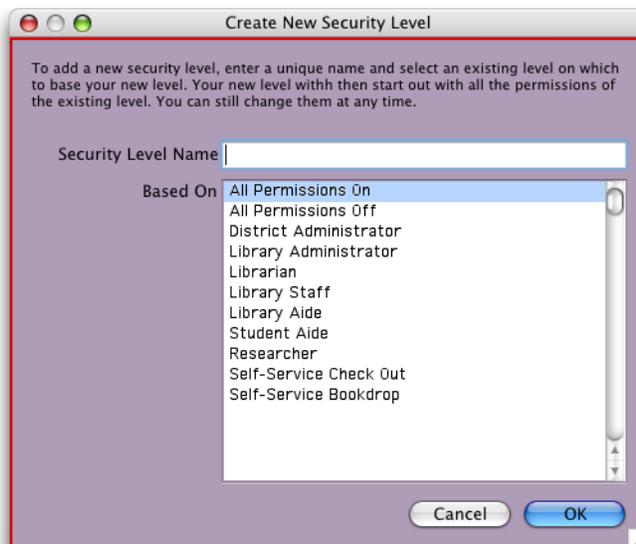
Add—This button (the red “plus” icon located in the lower-left corner of the **Administration** preference window) opens the **Create New Security Level** window; this window is documented on page 26.

Remove—Users with the appropriate authority can remove a user-created security level by highlighting (selecting) the level from the **Security Levels** section of the **Administration Security** window and clicking the **Remove** button (the red “minus” icon). Users will be asked if they are sure they would like to remove the selected security level; click **OK** to proceed or **Cancel** to abort the removal. Users will *not* be able to remove any of the Controller's default starting security levels.

Edit—This button (located on the lower-left corner of the **Administration** preference window) opens the **Edit Security Level** window; this window is documented on page 27.

Creating A New Security Level

This window, which allows users to create their own custom security levels, can be accessed by clicking on the **Add** button (the red “plus” icon located on the lower-left corner of the **Administration** preference window’s **Security** tab).



If you would like to create a new security level based on an existing security level and its list of enabled and disabled security options, select (highlight) the security level that you would like to have duplicated from the **Based On** field, enter a new **Security Level Name**, and click the **OK** button.

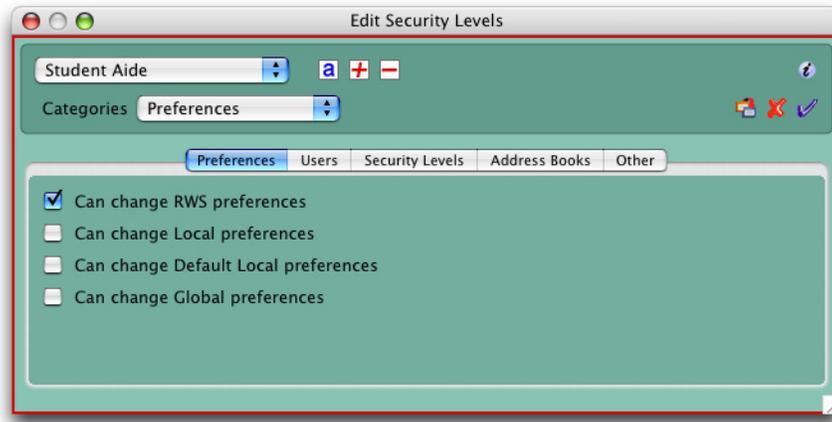
You may also choose to create a new security level that isn’t based on any that currently exist in your system. In this instance, you would want to choose **All Permissions On** or **All Permissions Off** from the **Based On** field; some users will find it easier to have all of their security options enabled or disabled when creating a new security level from scratch.

After you have successfully created/duplicated a new security level using the **Create New Security Level** window, it will appear in the **Security Levels** field of the **Administration** preference window’s **Security** tab.

From this point on, you may treat the newly created/duplicated security level as you would any existing security level; it may be edited, its name changed, or it may be completely removed from the system.

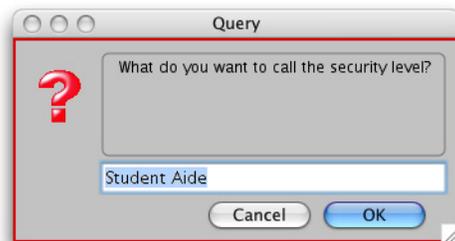
Editing A New Security Level

This window, which allows users to edit an existing (custom or default) security level, can be accessed by selecting (highlighting) one of the Security Levels on the Security tab of the Administration preference window and then by clicking on the Edit button (located in the lower-left corner).



You may toggle¹ between any of the Controller's existing security levels using the drop-down menu located at the top-left corner of the Edit Security Level window. You can use this drop-down menu as a quick reference to see how other security levels operate or to quickly change a specific permission on several different security levels.

You may edit the name of the current security level by clicking on the Edit Name button (the blue "a" icon). Doing so will open the Query window (shown below). Input the new security level name and click OK when you are satisfied with your changes. Users will be unable to change the names of the Controller's default starting security levels and each security level name *must* be unique.

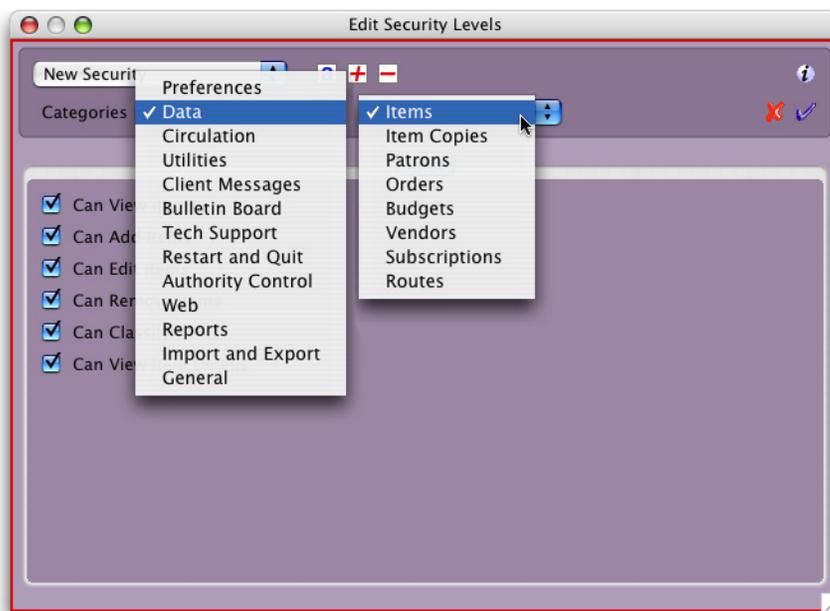


You may add a new security level from the Edit Security Level window by clicking on the Add button (the red "plus" icon). This button opens the Create New Security Level window; this window is documented on page 26.

¹ In technical terms, toggle means "to alternate between two or more electronic, mechanical, or computer-related options, usually by the operation of a single switch, drop-down menu, or keystroke (e.g. *toggled back and forth between two windows on the screen*)."

You may remove the current security level by clicking on the **Remove** button (the red “minus” icon). Users will be asked if they are sure they would like to remove the selected security level; click **OK** to proceed or **Cancel** to abort the removal. Users will *not* be able to remove any of the Controller’s default starting security levels. Once a security level has been deleted, it can not be restored.

The blue **Enable All** icon located in the upper-right corner of the window will activate (enable) *all* of the permissions for the current security level. The red **Disable All** icon located next to it will disable all of the permissions for the current security level.



NOTE:

If you would like more information on a specific security permission, you can examine their **Tools Tips** by holding down the `<ctrl>` (Windows) or `<option>` (Macintosh) key and moving over the permission names.

Alexandria Controller security permissions are categorized and compartmentalized into groups of similar permissions. You may toggle¹ between these categories of permissions using the **Categories** drop-down menus and tabs provided in the **Edit Security Level** window.

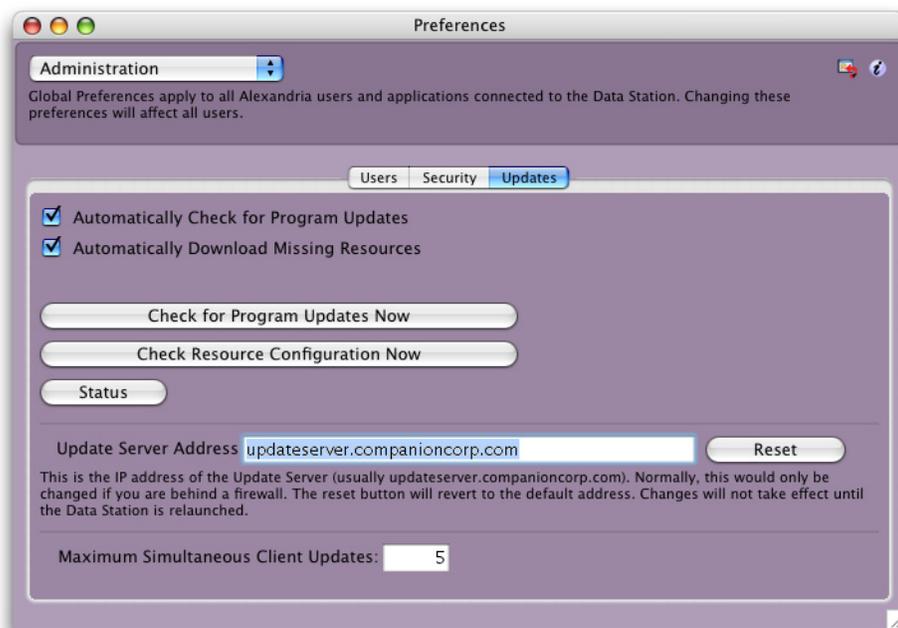
By clicking on the checkboxes contained within the tabs and menus of the **Edit Security Level** window, you can enable or disable specific security permissions for the existing security level.

When you have finished editing all of your security permissions, click **Save** to keep your changes or **Revert** to discard them. You will be required to **Save** or **Revert** before toggling between any other security levels or closing the **Edit Security Level** window.

¹ In technical terms, toggle means “to alternate between two or more electronic, mechanical, or computer-related options, usually by the operation of a single switch, drop-down menu, or keystroke (e.g. *toggled back and forth between two windows on the screen*).”

Updates Tab

The Alexandria Controller can be updated automatically over the World Wide Web.



Automatically Check for Program Updates—If this box is checked, the Controller will automatically check for product updates on start-up. If newer versions of the program are available, an entry will be placed in the log. You can also download updates via the **Check for Updates** utility.

Automatically Download Missing Resources—If this box is checked, the Controller will automatically verify on start-up that you have the latest versions of the client resources. Status entries will be placed in the log, and if any resources are missing, they will be automatically downloaded.

Check for Program Updates Now—Clicking this button will immediately check for available Alexandria Controller updates from the update server. If they are available, you can download them.

Check Resource Configuration Now—Clicking this button will immediately check your Alexandria Controller installation for any missing resources. If you are missing resources, you can download them.

Status—This will display a status report of update and resource information. It will not download any resources or updates, or modify your configuration in any way.

Update Server Address—This is the IP address of the COMPAnion Update Server (usually `updateserver.companioncorp.com:80`). Normally, this will only be changed if you are behind a firewall. The **Reset** button will revert to the default update server address. Changes will not take effect until the next time that the Controller is restarted.

Maximum Simultaneous Client Updates—This allows you to limit the number of connected clients that may download updates. The remaining clients will be placed in a queue while other clients finish updating.

**NOTE:**

Make sure to read the Read-Me file thoroughly for important information regarding the update.

Performing Software Updates

There are two ways you can perform software updates from within the Alexandria Controller. If you have an internet connection, you can check for Alexandria Controller updates using COMPanion's Update Server. If you select **File, Utilities, Check For Updates**, and an update is available, a description of the update is shown under the **Get Read-Me** selection. From there, you can choose to update the Alexandria Controller or wait for a future date. If you are sure you want to update to the newest version of the Controller, an easier method is to use the **Updates** tab in the **Administration** preference window under **Edit, Preferences**.

You can also download the newest COMPanion and Alexandria Controller software updates from the official website (www.companioncorp.com). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Alexandria Controller registration name, email address, school/company and serial code in order to proceed with the download; these can be found on the registration letter you received when you purchased the Controller or when you renewed your support contract.

If you have accidentally misplaced your registration letter, COMPanion's 24 hour Technical Support team will be able to assist you.

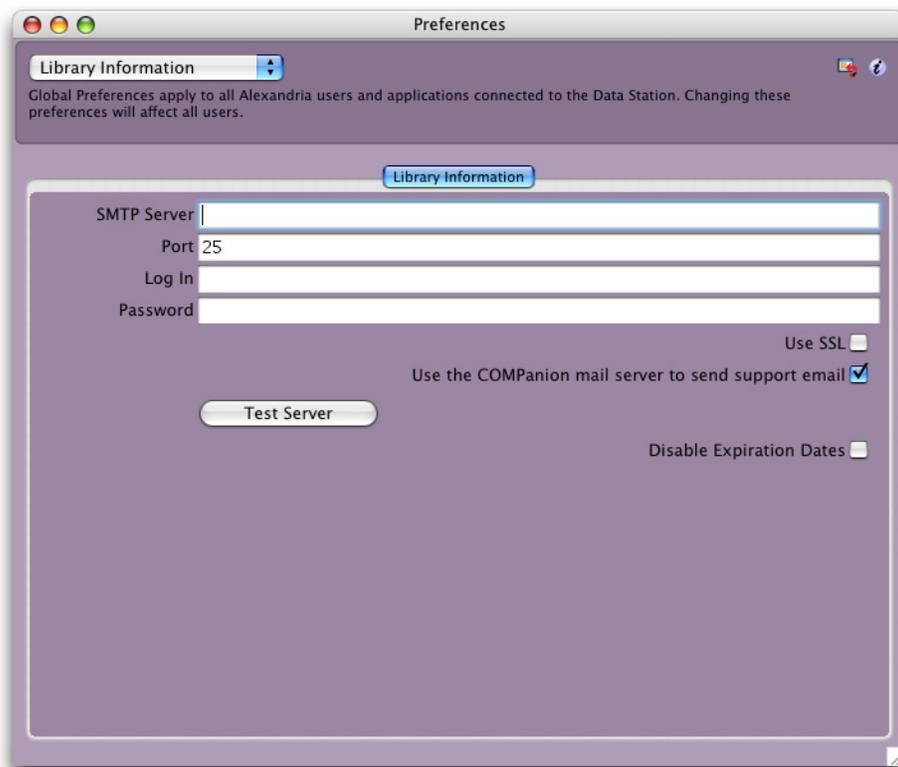
If you don't have a reliable internet connection (or are unable to download the newest updates), you can contact COMPanion (via email or Tech Support at 800-347-4942) and request that an Alexandria Controller Update CD-ROM be sent to your location.

Library Information Preferences

Use these preferences to configure technical district email information.

Library Information Tab

Email notifications are sent to all District Administrators who have supplied email addresses. If, for some reason, a Data Station unexpectedly stops running, the Alexandria Controller will send an email notice to all of the District Administrators.



SMTP Server—This is the TCP/IP or DNS address of your library's mail server. Typically, this will be "mail." followed by your domain name. You must enter a valid SMTP Server address to use email services. Default is blank.

Test Server—This button tests the SMTP mail server by sending a test email.

Log In—Enter the log in or user identification for the email sever.

Password—Enter the password for the email server.

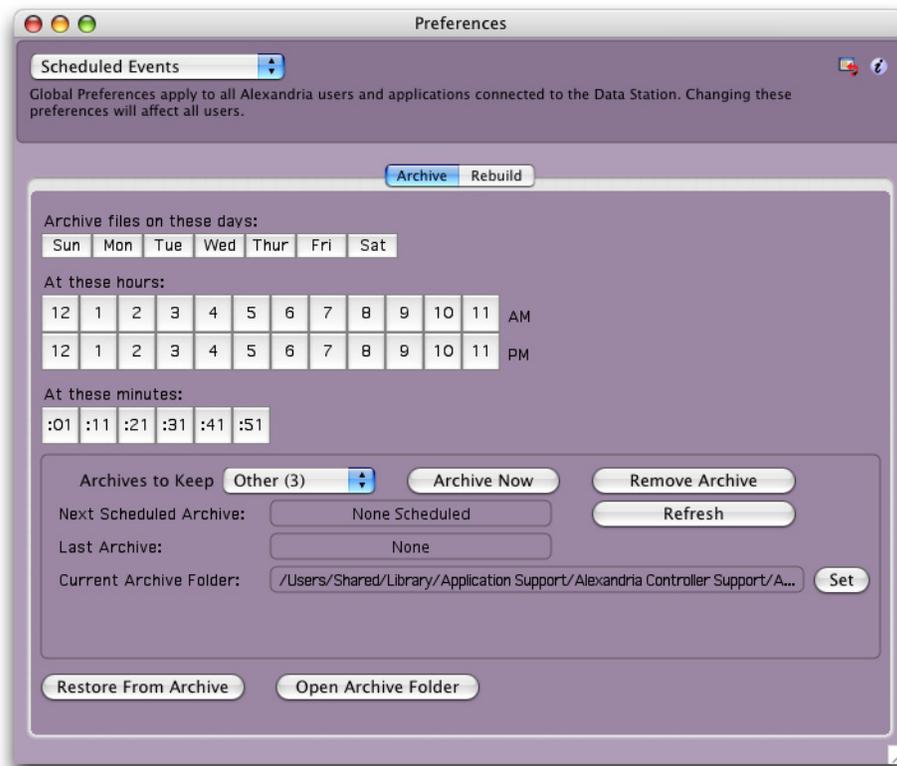
Use SSL—Short for **Secure Sockets Layer**; check this box if you would like to apply another protocol for transmitting data securely over the World Wide Web. While SSL provides for higher security email transfers, it is not compatible with all email servers.

Use the COMPANion mail server to send support email—Check this box to use the COMPANion mail server when sending emails to (for example) Technical Support.

Scheduled Events Preferences

Archive Tab

The Archive window allows you to schedule automatic backups of all your valuable Alexandria Data Station information. This preference keeps three backups inside the **Archive** folder, which is located in your **Alexandria Controller Support** system folder. Clicking on the **Open Archive Folder** button will open the application support directory where all your archived data is stored.



When it's time for an archive, all information in your Data Station's **Data** folder is copied to a subdirectory in the **Archive** folder. All services on the Data Station being archived are disabled.¹

Although you can disable the automatic archiving function, this is *not* recommended. Your most recent archives (combined with your off-site backup) are invaluable in securing the safety of your library data.

- N O T E -

The Data Station must be **Running** when you have the archive scheduled to take place. Thus, if the administrator doesn't want to leave their computers running overnight, they should change the default time(s) that the program is set to archive.

1. This feature will archive *all* of your managed and active Data Stations.

How Archiving Works

If the **Archives To Keep** drop-down menu is set to anything below four (including zero), the **Archive Now** button will keep five *manual* archives (as though the **Archive To Keep** preference was set to 5) and when a sixth *manual* archive is requested, the Controller will first create a new data archive before removing the oldest archive in the **Alexandria Controller Support > Archive** folder.

In other words, every time you click the **Archive Now** button, the Controller will perform a *manual* archive (even if your **Archives To Keep** is set to zero). However, if your **Archives To Keep** preference is set higher than 5, then the **Archive Now** selection will no longer ignore the **Archives To Keep** preference; in other words, *manual* archives will now be restricted to the specified **Archives To Keep** value.

The Alexandria Controller will perform an automatic archive based on the value specified in the **Archives To Keep** drop-down menu. Therefore, if your **Alexandria Controller Support > Archive** folder contains more archives than the **Archives To Keep** preference states, the Controller will remove all of the surplus archives (oldest archives first) after it creates a new *automatic* archive.

For example, if you have the **Archives to Keep** preference set to 2 and the Controller has already created two *automatic* archives in the **Alexandria Controller Support > Archive** folder, you will be able to add three additional *manual* archives to the folder, equalling five total archives.

If the **Archives to Keep** preference is set to 10 and the Controller has already created four *automatic* archives in the **Alexandria Controller Support > Archive** folder, you will be able to add six additional *manual* archives to the folder.

During an *automatic* archive, if the **Archives to Keep** preference is set to 2 but you have *manually* created three additional archives, the Controller will create a new automatic archive before deleting the three oldest archives in the **Alexandria Controller Support > Archive** folder. This way, the number of remaining archives will match the value specified in the **Archives to Keep** preference (in this instance, two).

Use the **Refresh** button to update the dates and times for the **Next Scheduled Archive**, and **Last Archive**.



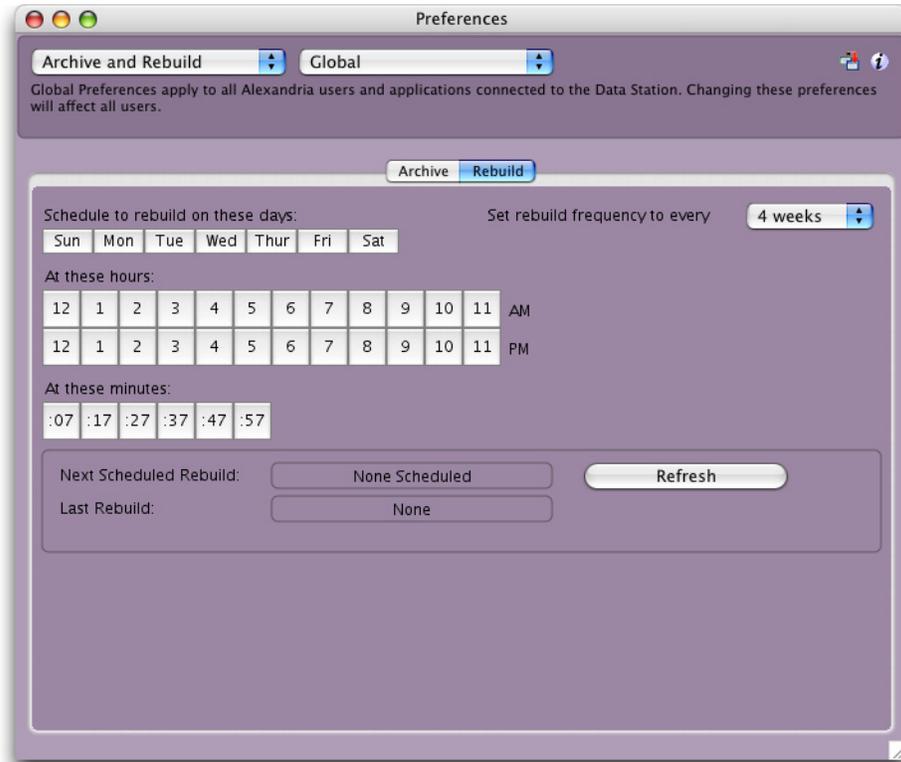
NOTE:

Archives are not a backup! Keeping an offsite backup is highly recommended.

Archives come in handy when trying to fix a bad import, but are entirely useless in the event of a system crash.

Rebuild Tab

The Rebuild tab allows you to schedule automatic rebuilds for *all* of your managed Data Stations. The Rebuild tab will show the date of your next scheduled rebuild and also display the date of your last automatic or manual rebuild.

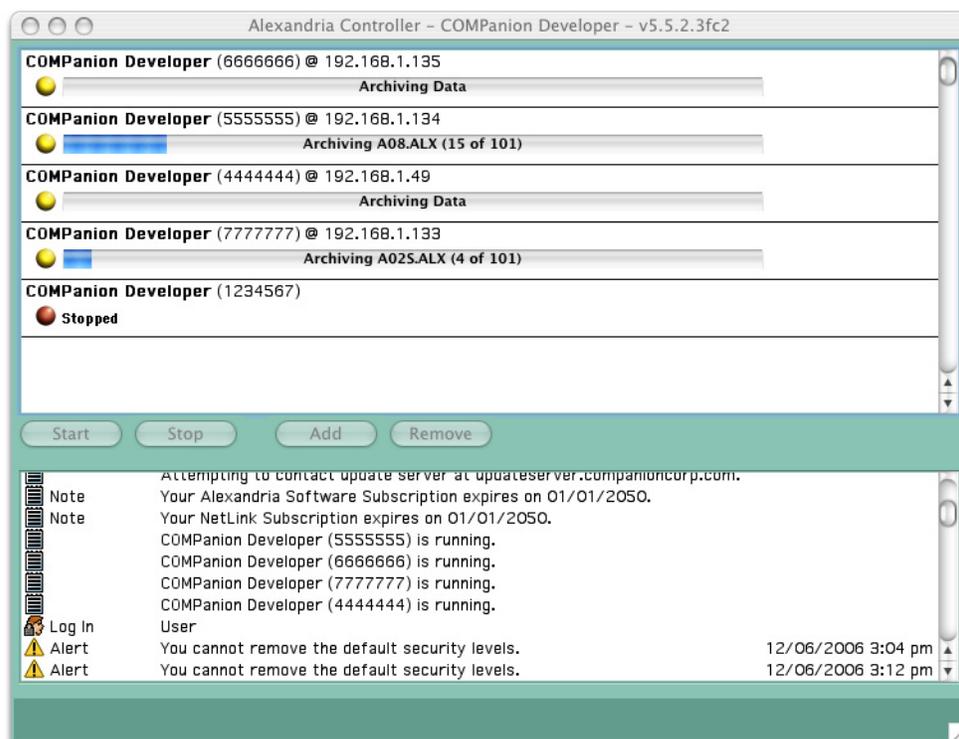


Use the Refresh button to update the dates and times for the Next Scheduled Rebuild, and Last Rebuild.

Archiving and Rebuilding with Alexandria Controller

Using the Alexandria Controller, you can schedule archives and rebuilds for all your managed Data Stations. The *actual* rebuilds and archives, however, are performed individually by each Data Station.

While an archive or rebuild is taking place on a controlled Data Station, its progress is shown on the Controller's interface window.



When your Data Station is managed by the Alexandria Controller, client workstations will no longer have the ability to directly edit their Data Station's **Archive** location. Instead, this location is **Set** for all your managed Data Stations in the **Archive** preferences of the Controller itself.

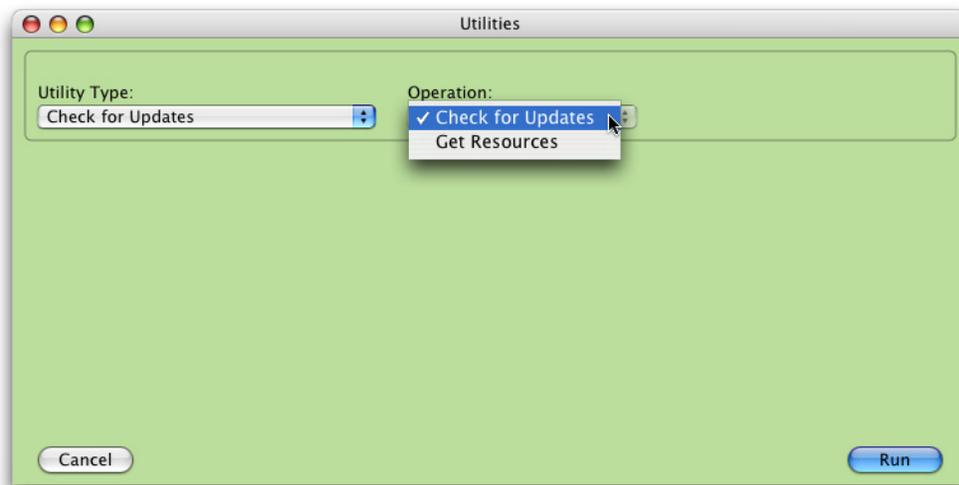
Furthermore, when an Alexandria Controlled Data Station is forced to rebuild on startup, its **Data** folder is also archived to the location **Set** in the Controller's **Archive** preferences.

If the **Archive** folder is removed, the Controller will recreate the folder. If it can't recreate the folder, it will revert back to the standard, default location. This way, your Data Station will always have its archives saved in the correct location.

Alexandria Controller Utilities

The Controller's Check for Updates utility downloads important updates to your software.

Check for Updates



Check for Updates

This utility will check for any available Alexandria Controller or Data Station updates. If there are any available, they will be presented and you will have the option of choosing which you would like installed. You should **Archive** your Data Stations before performing an update; we recommend that you read the release notes thoroughly beforehand to ensure that your hardware meets the minimum system requirements and so that you are aware of any major software changes that were made.

Get Resources

This utility will verify that you have the latest versions of the client resources. If any resources are missing or there are new resources available, they will be downloaded.

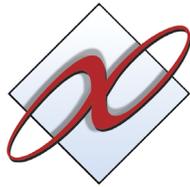
What Happens When the Alexandria Controller Timeouts?

The Alexandria Controller contains advanced Multi-Data Station technologies. Although it's not necessary to understand how the Controller does what it does, this section is for the technical person who wants to know a little more about what happens when the Alexandria Controller quits or times out.

- Quitting the Alexandria Controller causes all of the Data Stations to quit. Non-responsive Data Stations are *forcibly* terminated after five seconds with an additional five seconds for each active Data Station.
- When the Alexandria Controller is shutdown, **Remote Control** procedures on the client workstation are ignored and anyone working on that workstation will be instantly disconnected.
- Before the Alexandria Controller quits after downloading an update, it will forcibly terminate all of the active Data Stations first.
- When the Alexandria Controller needs to quit, it will time-out after eight seconds with an additional two seconds per active Data Station.
- Remote Control is ignored when the Alexandria Controller performs an update, checks for updates, or performs an archive.

! W A R N I N G !

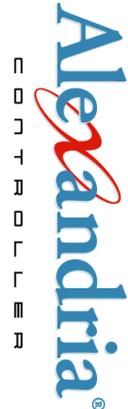
COMPanion recommends that all maintenance to your Alexandria Controller or managed Data Stations be done after business hours as the Alexandria Controller ignores Remote Control procedures for some actions



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