



Basic Training Manual

Version 5.5.3.1

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1 Introduction

A. Introductions -- Trainer and Attendees

B. Training Outline and Manual

C. Safe Seven

1. BACK UP, BACK UP, BACKUP

COMPanion recommends that you keep **a minimum of NINE backups** at any given time. Backups are saving complete copies of your Data folder to some external medium be it on Zip disc, Jazz disc, Superdisk, CD-ROM, another hard drive, a file server or a tape. You should keep at least one backup per day of the week, plus four previous Fridays. We never discourage customers from keeping additional backups.

You do not need to back up the software. COMPanion can quickly replace the software. if your library is current on its subscription. What COMPanion cannot replace is your data — so BACK IT UP!

It is strongly recommended that at least one copy of your data be stored off-site (e.g. take the Friday backup home). Libraries have been burglarized and all computer equipment including the backup discs have been taken. Libraries have also burned down and the backups have been instrumental in obtaining a quick and settlement from the insurance company.

2. Perform standard machine maintenance.

Ideally, every machine should be scanned each month for viruses and for file damage. Run either **Norton Disk Doctor** (Macintosh) or **Scandisk** (PC) on a frequent basis. On Windows, a **Defragmentation** of the hard drive should also be done regularly. Alexandria cannot be expected to run correctly when the operating system or file structure is damaged.

3. Perform Alexandria maintenance.

Every month you should run **Rebuild** on your database. It can only be run from the Data Station and can take several hours to run depending on the strength of your machine and the size of your collection. **Rebuild** checks that the indexes used for sorting, browsing, and selecting match the data, that the records are key worded appropriately, and that the status counters are correct. Always archive before running **Rebuild** or any other major utility or import. Rule of thumb: If it might take longer to correct a problem caused by a bad import or running a utility incorrectly than it will take to run an **Archive**, you should archive your data before performing the **Rebuild** or doing an import.

To set up Rebuild in Scheduled Events preferences:

- Click on **Edit** on the menu bar and select **Preferences**.
- Using the drop-down menus in the upper-left corner of the **Preferences** window, select **Scheduled Events** from the first menu and **Global** from the second menu.

- Click on the **Rebuild** tab.
- Select the **Day** of the week and the **Hour** and **Minute** settings for when you want **Rebuild** to run. This should be set for a time of day when patrons and employees will not be using Alexandria such as Friday night at 11:47 p.m. Normally, **Rebuild** should be run every **four weeks**.
- Click on **Save** and close the **Preferences** window.

NOTE: Alexandria's Data Station must be running for **Rebuild** to be run.

To run a Rebuild immediately.

- Go to **File** on the menu bar.
- Select **Rebuild Now**.
- Select both **Run an Archive before rebuilding** and **Restart after a successful rebuild**.

Rebuild looks at every record and pointer in Alexandria's database. If it encounters any problems in the record, Alexandria will do everything possible to correct the problems; however, if the problems cannot be resolved, the record is deleted. The following procedures are recommended in conjunction with **Rebuild**:

At the end of the day on which Rebuild will be run:

- Click on the **Support** tab in the middle of the **Circulation** window.
- Click on the System Analysis icon (second down, looks like a computer tower with a magnifying glass)
- Write down the first four figures (number of patrons, titles, copies, and transactions) that are shown in the left pane of the tab.
- Go home.

The first thing in the morning on the first work day after Rebuild has been run:

- Click on the **Support** tab in the middle of the **Circulation** window.
- Click on the **System Analysis** icon and compare the figures that you wrote down on Friday with the figures that are shown.
- If the figures are the same, no problems were found.
- If the figures are different, there were problems found in your database that could not be repaired. Call Alexandria Tech Support (1-800-347-4942) and tell them and they will be able to help you restore from an Archive and bring your data up to date so that you have all your records.

4. Have a **UPS (Uninterruptible Power Supply or battery backup)** on the Data Station and test it.

Alexandria 5 uses TCP/IP technology for its communication and operation procedures. The server program, called the Data Station, must be running for any clients, also known as workstations, to search, circulate, run reports, etc. For Alexandria, there are two types of workstations — Alexandria **Librarian Workstations** or Alexandria **Researcher Workstations**. If the **Data Station** program is not running, NO ONE can view or change the data. (In case there is

an extended power failure over the weekend, it is essential that you back up your data before leaving on Friday.)

In addition, the **Data Station** does all the work with the data; the clients simply ask the **Data Station** to perform various procedures. As such, the **Data Station** should be on the best machine available.

Since the **Data Station** does all the work, it has the ability to prioritize requests from the clients. Some procedures will be postponed temporarily while other more pressing procedures are addressed. The **Data Station** will, therefore, hold some things in memory to take care of when it is not so busy. If there is an interruption of power, your data can become corrupt if you do not have a UPS to protect it.

A UPS is an **U**ninterruptable **P**ower **S**upply and is only meant to give you enough time to get to the **Data Station**, quit Alexandria, and shut down the machine appropriately. Do not connect unnecessary machines or appliances to a UPS since they will drain critical energy from the UPS.

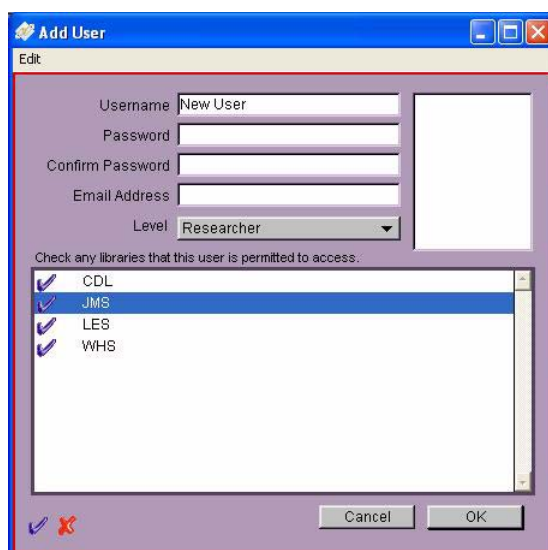
5. Enable Security.

The Alexandria program comes without any security protocols activated. As such, unless you install an additional security program or enable security within Alexandria, anyone can launch Alexandria and have full privileges to add, remove, and change patrons, items, orders, budgets, vendors, subscriptions or routes or to check items in and out, assign and forgive fines, etc. It is strongly recommended that you enable security within your Alexandria preferences.

In addition, if your **Data Station** is publicly accessible and without some form of system security, someone could delete, move, or rename your data file. It is, therefore, strongly recommended that you install and enable a system security program. Some operating systems come with such security built in.

To enable security:

- Go to **Edit** on the menu bar and select **Preferences**.
- Set the two drop-down menus in the upper-left corner to **Administration** and **Global**.
- On the **Users** tab, click on the **Add (+)** icon at the bottom-left of the window.



- Fill in the **Username** and **Password**. Fill the same password in the confirm **Password** field. Enter the **email address** of the user.
- Set the **Level** of security using the drop-down menu. The first person entered must be the **Library Administrator** or **District Administrator** level person. More than one person may be given that level.
- If you are in a Central Union system, check the **Libraries** for which the user will be granted privileges.
- Click on **OK**.
- Check the box for **Require User Login**.
- Click on **Save** on the **Preferences** window, then, close the **Preferences** window.

To customize the privileges of a security level:

- Go to **Edit** on the menu bar and select **Preferences**.
- Set the two drop-down menus in the upper-left corner to **Administration** and **Global**.
- Click on the **Security** tab.
- Double click on the **Security** level you wish to customize.
- Using the **Categories** drop-down menu and any tabs or other menus that are shown, consider the options given and check privileges you wish to grant a user with the security level and uncheck those you do not wish to grant the user.
- When finished, click on **Save** in the upper-right corner of the window.
- Close the window for the specific security level, then, click on **Save** on the **Preferences** window.

6. Watch your screen at all times.

Alexandria offers audio clues to alert you to special circulation and program messages, this function isn't helpful if, for some reason, the computer sound is not working. Alexandria is also streamlined for certain procedures based upon assumptions that are often made in the library environment. Those assumptions may differ from what you desire. **ALWAYS, ALWAYS, ALWAYS** watch your screen. Fully read each message and ensure that what you thought you did was exactly what the program claims you did.

7. When in doubt, contact Technical Support.

If your library is current on its support subscription, when you have a problem or a question, please contact Technical Support. you can call Technical Support 24 hours a day, 7 days a week, 365 (or 366) days of the year. Phone number: 1-800-347-4942.

During the busy time of the year (beginning of school, beginning of the calendar year, and inventory season), you may be asked to leave a voice message. Tech support will contact you as soon as they are available. The goal is to return these calls in less than an our.

You can email Technical Support directly from Alexandria 5.5.3. Emailing from the program not only sends your message or question to Technical Support, but also sends information about your machine, its hardware, memory, your data, and the version of Alexandria you are running.

To email Technical Support:

- Click on the **Support** tab on the middle-right side of the **Circulation** window.
- Type the subject and the desired message in the fields provided on the **Email Tech Support** tab. If this isn't the current pane, click on the **Letter** icon to bring this pane to the front.
- Click on **Send Message** to send the message.

NOTE: You cannot email Technical Support if you do not have a return email specified in your **Library Information** preferences and if you do not have an Internet connection.

D. Alexandria Help

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

In the upper-right corner of each Alexandria module window is an *i* in a circle. This is the **Help** icon. If you click on this icon, it will open the **Help** document associated with that window.

The second method is to view an index of all the help documents at one time. The **Alexandria Help Index** gives a list of the **Help** documents grouped in categories in the same order that these are talked about in the Alexandria User's Manual. If you would like to view the **Help** documents in an alphabetical listing, there is a link on the **Alexandria Help Index** that will take you to a help index that is in alphabetical order.

To view the Help Index:

- Click on **Help** on the menu bar.
- Select **Alexandria Help**.
- Click on the desired **Help** document.

E. ListSerts and Tech Notes

1. Alex-Net

Alex-Net is a friendly forum that allows Alexandria customers to post questions, problems, and product ideas. Posted messages are then sent by email to the members of Alex-Net. This forum enables users to help other users, share tips and tricks, or ask and answer questions about Alexandria.

To subscribe to Alex-Net:

- Go to Alexandria's web site, **<http://www.goalexandria.com>**
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Select **Alex-Net & Other ListSerts**.
- Check **Alex-Net** and fill in the form.
- Click **Submit**.

2. Tip of the Week

Tip of the Week is tips for running Alexandria more smoothly and these tricks of the trade are written by the Alexandria staff librarians. You may view them every week both via email or on our web site.

To receive the weekly Tip of the Week emails:

- Go to Alexandria's web site, **<http://www.goalexandria.com>**.
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Select **Alex-Net & Other ListSrvs**.
- Check **Tip of the Week** and fill in the form.
- Click **Submit**.

To view the current and past Tip of the Week documents:

- Go to Alexandria's web site, **<http://www.goalexandria.com>**.
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Click on **Tip of the Week**.
- The current **Tip of the Week** is in the main frame of the window.
- To view previous tips, click on **TOTW by Subject** in the **Tip Archive** box on the right side of the window.
- Click on the desired **Subject**.
- Click on the desired tip document in the list.

3. Tech Notes

Our Tech Support personnel have written many excellent Tech Support documents for your benefit. These can be found on our Alexandria web site.

To view Tech Notes:

- Go to **<http://www.goalexandria.com>**
- Click on **Tech Notes** under **User Favorites** on the left side of the window.
- Select the appropriate **Tech Notes** group.
- Select the desired **Tech Note** document from the list given.

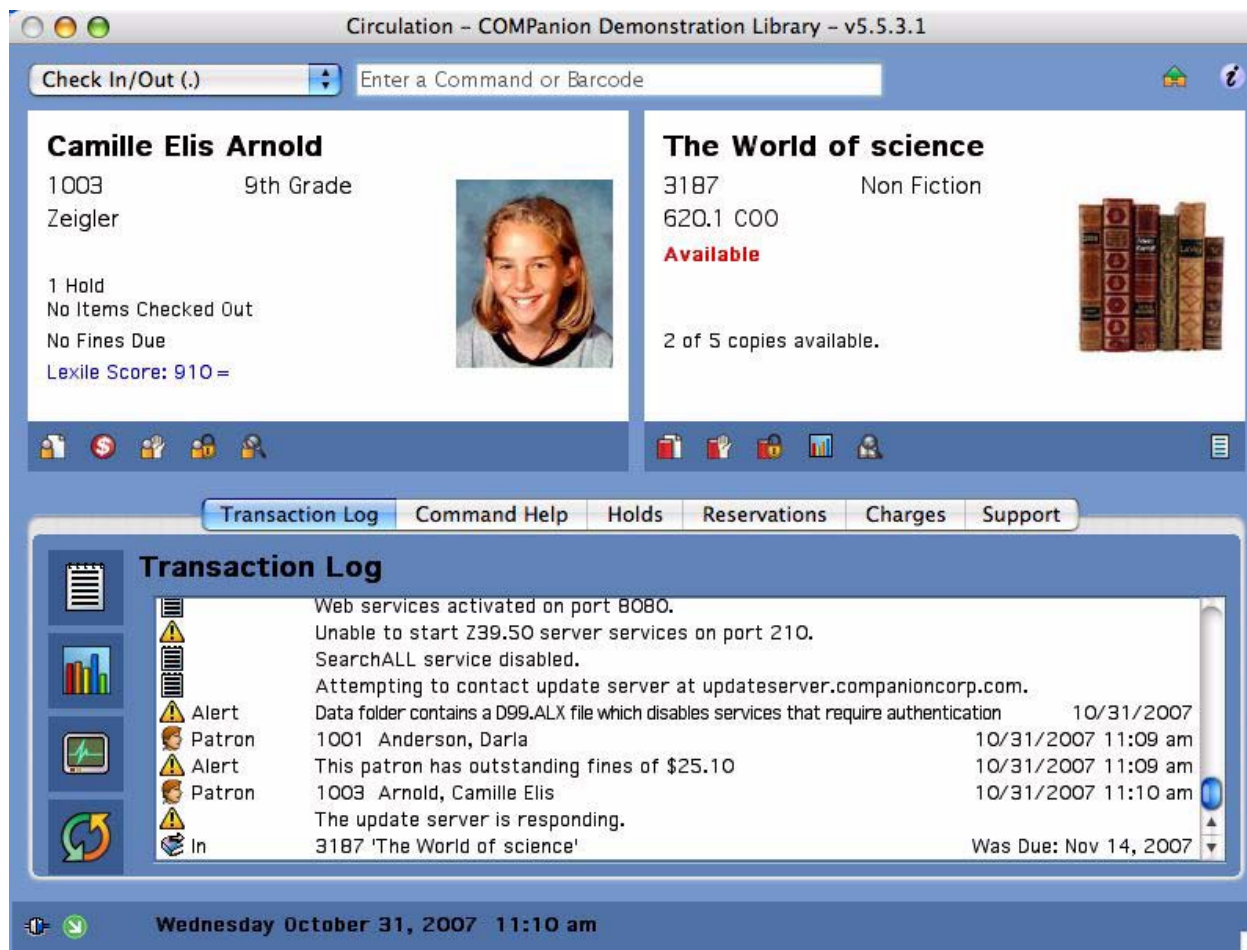
2 Circulation

If the **Circulation** window is not active, click on **Show** and select **Circulation**.

A. Menu Bar

B. Circulation Window

C. Check In / Out



1. Check out *World of Science* (3187) to Camille Arnold (1003).

Patron Details

Item Details

Copy Status Icon

2. Check out *Exploring the Sea* (3064) and *Mississippi* (3129) to Rebecca Eckhoff (1032).

To check out an item:

- Make sure the mode is set to **Check In /Out**.
- ALWAYS bring up the patron first.
- Set the **Override** date, if necessary.
- Type or scan the barcodes of the items to check out.
- Respond to any **Circulation Alert** messages.
- If using an override date, clear it by typing a period (.) and pressing **<enter>**.

D. Override Dates

3. Check out *The Iceman Cometh, a Play* (3430) and *A Week in the Lives of Best Friends* (3207) to Jami Stark (1009) until the end of the school year. (Remember to clear override date when no longer needed.)

To set an override date:

- First, enter the desired mode.
- Type the date in **MMDDYY** format and press **<enter>**.

To clear an override date:

- Type a period (.) and press **<enter>**.

E. Circulation Messages

4. Check out *The Faber book of Christmas Stories* (3191) and *Still More Knock-Knocks* (3027) to Marijane Lou Coots (1036). Choose **Yes to check out the item**. Note the Transaction Log.
5. Check out 3520, 3523, and 3072 to Joseph Todd Berol (1014). (Choose **Override** and then choose **Cancel**.)

F. Bookdrop Mode (B)

6. Check in 3129.
7. Check in 3637.
8. Check in 3085.

9. Check in 3193.

10. Check in 3430.

To check in a single item:

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

To check in multiple items:

- To enter **Bookdrop** mode, there are three methods:

In the **Command Line**, type **B** and press **<enter>**.

OR

Choose start **Bookdrop** from the **Circulation** menu on the menu bar.

OR

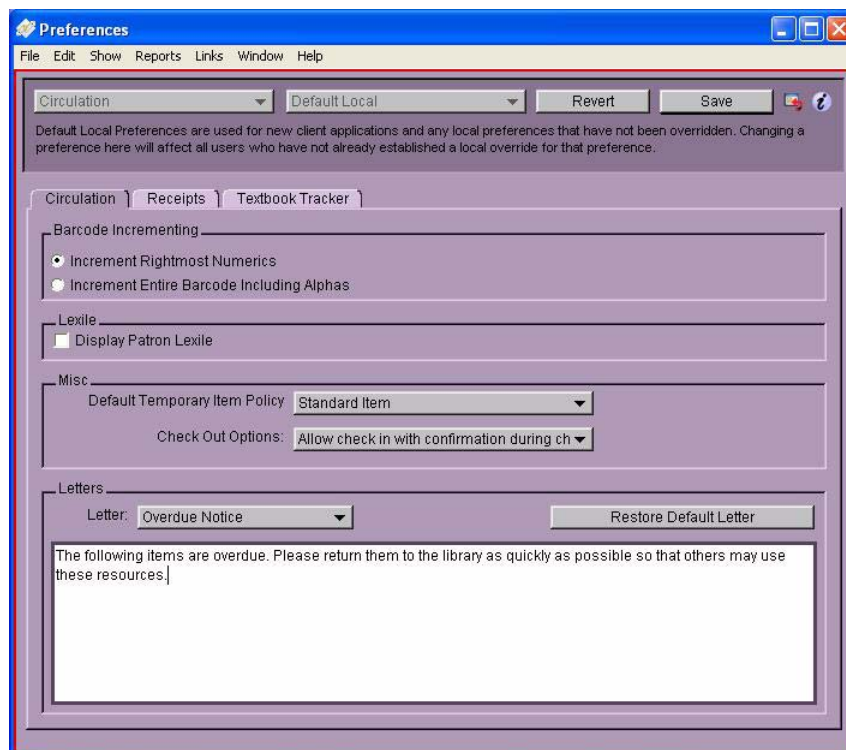
Click on the drop-down menu next to the **Command Line** field and select **Bookdrop**.

- Set the **Override** date for the date the copies were or should be listed as returned if different from today's date.
- Type or scan the barcodes of the copies to check in.
- Respond to any **Circulation Alert** messages that appear.
- When finished using the **Override** date, clear it by typing a period (.) and pressing **<enter>**.

NOTES:

- If patron barcodes are the same as item barcodes, you must always put a **P** in the **Command Line** before scanning the barcode. (It is recommended that you change one of the barcodes to remove the conflict.)
- When typing barcodes rather than scanning barcodes, always follow the barcode with an **<enter>**.

- It is suggested that you change a **Circulation** preference.
 - Go to **Edit** on the menu bar and select **Preferences**.
 - Set the two drop-down menus in the upper-left corner of the **Circulation** window to **Circulation** and **Default Local**.



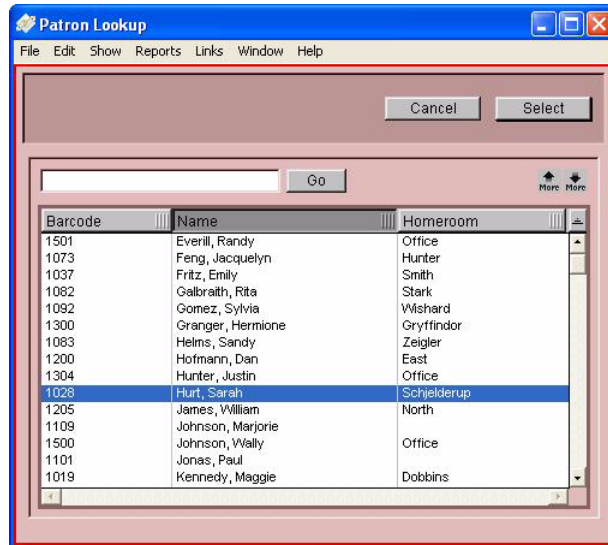
- On the **Circulation** tab under **Misc**, set the drop-down menu to **Allow Checkin with Confirmation During Checkout**. With this preference selected, when an item that is checked out to the **Current Patron** is scanned, you will be asked whether you want to check the item in or renew it. This is much safer than the default preference which assumes that you wanted to check the item in and will not ask you. If you were not watching the **Transaction Log**, you would not know that the item had been checked in and you could let the item walk out the door.
- Click on **Save** in the upper-right corner of the window, then, close the **Preferences** window.

Let's Practice

- Check out the item, *Test Your Wits* (3051) to Michelle Sciera (1026).
- Check out the item, *Medical Emergency* (3205) to Luann Larimer (1033).
- Check out the items, *Virginia* (3151), *Bears* (3087) and *The History of Impressionism* (3426), to Derrick Pichon (1006).

3 More Circulation

A. Locate a Patron by Last Name (L)



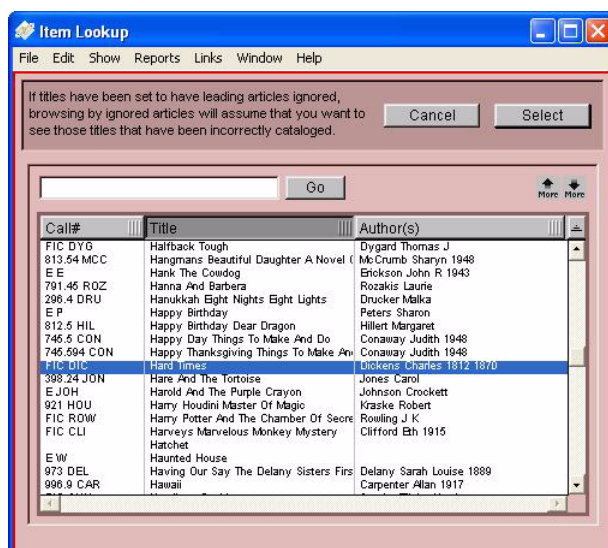
NOTE: Always put a space between the **L** and the text for your search. Although the space is not required, there are other commands such as **LM (Lost Mode)** and **LF (Locate by First Name)** which will cause confusion -- if you type LFRAN, are you searching for a first name beginning with RAN or a last name beginning with FRAN? Alexandria will consider it to be the **LF** command instead of a last name search.

1. Locate Darla Anderson and make her the Current Patron.

To look up a patron by name:

- Either click on the **Command Help** tab and choose **Locate Patron** or type **L**.
- Type as much of the patron's last name as needed and press **<enter>**.
- Click on the correct name to highlight it and then click **Select** or double click on the correct name.

B. Locate an Item by Title (T)



2. Locate the title, *World of Science*.

To look up an item by title:

- Click on the **Command Help** tab and choose **Find Title** or type **T**.
- Type the first part of the title and press **<enter>**.
- Click on the correct title to highlight it and then click on **Select** or double click on the correct title.

C. Place a Hold on a Title (H)

3. Place a hold on *World of Science* for Darla.

To place a hold:

- Scan or type in the patron's barcode to make that person the **Current Patron**.
- Type the command, **T**, and type enough of the title to take you to the correct part of the title list.
- Select the title from the list. Double click on the title or click on **Select** to make the selected title the **Current Item**.
- Type **H** (for **Hold**) and **=** (for the **Current Item**) (e.g. H=) and press **<enter>**. NOTE: You may also type **H** and the barcode of the item (e.g. H1234).

D. Place a Forward Reservation on a Specific Copy (G).

The screenshot shows the Mars software interface. At the top, there's a menu bar with 'File', 'Edit', 'Show', 'Reports', 'Links', 'Window', and 'Help'. Below the menu bar, there are input fields for 'Month:' (set to 'January') and 'Year:' (set to '2002'). To the right of these fields are 'Cancel' and 'Save' buttons. Below the month/year fields, there are three main input areas: 'Copy Barcode/Library' (containing '3040'), 'Call Number' (containing '523.4 ASI'), and 'Volume'. Below these, there are fields for 'Shelving', 'Location', and 'Library' (containing 'CDL'). The main part of the interface is a calendar grid for January 2002. The grid shows dates from 30 December to 9 February. Some dates are marked 'Closed' (e.g., 30 Dec, 5 Jan, 12 Jan, 19 Jan, 26 Jan, 2 Feb, 9 Feb) and others are marked 'Processing' (e.g., 11 Jan, 18 Jan, 25 Jan). The 'Save' button is visible at the top right.

4. Create a forward reservation for Keri Dobbins for the item, *Mars* (3040) for the second full week of next month.

To create a forward reservation:

- Scan or type the patron's barcode to make the person the **Current Patron**.
- Type **G** (think -- "Get it later") and type or scan the barcode of the item on which to place the reservation.
- Select the desired **Month** and **Year**.
- **Click, hold** and **drag** to highlight the dates for the patron's reservation for that item.
- Click **Save** when finished.

E. Renewing an Item (R, RA and Renewal Icon)

5. Renew *A Week in the Life of Best Friends* (3207) by typing R and the barcode.

6. In Renewal mode, renew items 3190 and 3167.

7. Mark Arias would like to renew three of his books, but did not bring them with him. Renew *Case of the Great Train Robbery*, *10-5 Alaska Skip*, and *Ed Emberley's Picture Pie* using the Renewal window.

8. Todd Malta (1013) would like to renew all of his books, but did not bring them with him. Renew them using the RA command.

To renew an item:

- If the item is present, simply type **R** for renew, then type or scan the item barcode number.

- For multiple renewals, type **R** and press **<enter>**. then, scan the barcodes of the items to be renewed. When you are finished renewing, type a period (.) and press **<enter>**.
- If the item is not present, enter the patron's barcode number. Then, click on the **Renewal** icon either below the **Patron Picture** or on the bottom icon on the **Transaction Log** tab. Select the titles to be renewed or click on the **Renew All** button. (NOTE: You may select individual titles by holding down the **<cmd>** key (Macintosh) or **<ctrl>** key (Windows) and clicking on the desired titles.)
- If the items are not present and the patron wished to renew all the titles, make the patron the **Current Patron** and type **RA** and press **<enter>**. This will automatically renew all items checked out to that patron.



NOTE: These same functions may be accomplished using the **Renewal** window. Simply click on the **Renewal** icon, then use the buttons at the bottom of the pane.

Title	Due Date	Renewed	Library	Fine
Polar bear	Jun 21, 2007	0	CDL	0.00
Stories for seven-year-olds and other young rea	Jun 21, 2007	0	CDL	0.00

F. Declaring a Copy Lost

9. Darla Anderson (1001) has lost the book, *Polar Bear*. Declare it lost.

To declare an item lost:

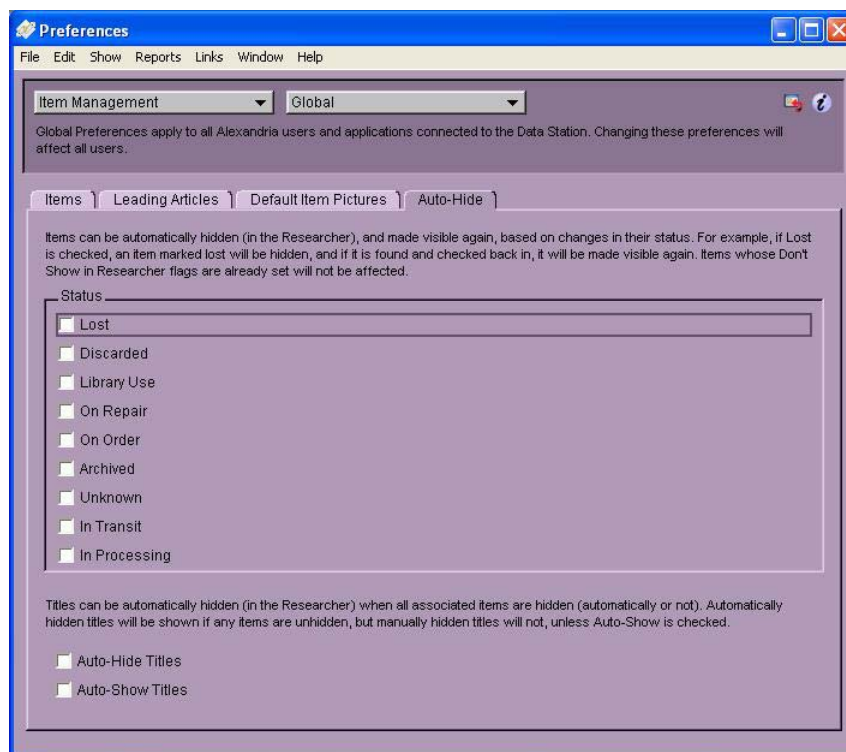
- In **Check In / Out** mode, scan or type the barcode of the patron with the lost item(s). If the barcode was typed, press **<enter>**.
- Click on the **Renewal** icon under the **Patron Picture** area or at the bottom-left of the **Transaction Log** tab to open the **Renewal** pane.

- Highlight the item(s) to be marked lost.
- Click on the **Declare Lost** button.
- If you are sure you want to make the selected item lost, click **Yes** on the dialog window that opens.
- Complete the process in the **Charges** window on which you may forgive a portion or all of the charge, add an additional charge, take a payment, and print a receipt as desired.
- This will automatically check the item out to **Patron** barcode **1**, the **Lost Copies** patron, and mark the item as lost.
- When you are ready to permanently remove lost copies, use the **Remove Lost Copies** utility found in **Item Utilities**.

NOTES:

- When searching for a patron or item, you only need to type as much of the title or name to get to the general area on the **Browse** window (e.g. And for Anderson). Use the two **More** arrow buttons to show you more selections in the list before or after your search entry.
- When using the **T** command, if you type in a leading article or leading punctuation, Alexandria will search using that article and will not find the title if the **# of Non-filing Characters** field is set to ignore those characters. To find the title, it might be necessary to try the search with *and* without the leading article or punctuation. Leading characters in title tags other than the 245 tag are ignored based upon MARC record standards. See **Alexandria Help -- Leading Articles** for more information.
- Holds are against a single title record. If one copy of that title is available, the hold becomes an in-stock hold waiting for the patron to pick up the item.
- In-stock holds are removed when the copy is checked out. Checking out a different copy of the same title does not remove the in-stock hold.
- For Central Union customers, the **HC** command allows you to place a hold on a particular copy. this ensures the hold is from your collection.
- Reservations are against specific copies for specific days. Only the patron who placed the reservation can check out that copy during the time of the reservation.
- When declaring a copy lost by a specific patron, DO NOT check in the item first. Use the **Declare Lost** button on the **Renewal** window.
- Use the **Lost Copies** patron to tag copies for removal later. This feature enables you to account at the year's end for how many copies were lost and the value of those items.

- You may set your preferences to automatically hide lost and discarded items.



Let's Practice

- Paul Rockwell forgot his library card. Locate his record and check out the item, *Egypt* (3199), to him.
- Mitchell Miller (1034) wants to know if you have the item, *The Plague*. Check to see if you have that item. and check it out to Mitchell.
- Bill Schjelderup (1004) called you and really wants the item, *Animal Farm* (3520). Place a hold on that item for Bill.
- Michelle Sciera's (1026) best friend just checked out the item, *The Faber Book of Christmas Stories*. Michelle wants it after her friend is finished. Place a hold on that item for Michelle.
- Keri Dobbins (1020) is teaching a unit on European countries next month. She always uses the item, *The Netherlands* (3252). She wants to reserve it so that she is sure it will be available for the first full week next month.
- Renew *Cheaper by the Dozen* (3462).

4 Special Circulation

A. Statistics Mode (Y)

1. **A class has just finished doing research in the library during which many books were used "in house." You want to record usage of these books not only to increase your circulation statistics, but to track usage of these items — *Mars* (3040), *Saturn, the Ringed Beauty* (3082), and *The Space Atlas* (3805).**

To use Statistics mode:

- Type **Y** and press **<enter>**.
- Scan the barcodes of the item(s).
- When finished, type a period (.) and press **<enter>**.

B. Charging a Fee (F)

2. **Maryjane Lou Coots returned *Still More Knock-Knocks* (3027) with slight water damage. Charge her \$3 for the damage.**

To charge a fee:

- First, make the patron current by typing or scanning the patron's barcode or using the **L** command to locate the patron by last name.
- Type the **F** command (for Fee), then the fee amount, and, lastly, the description of the fee. Press **<enter>** finished. (e.g. **F 3 Water damage on 3027**).

NOTE: Alexandria saves you key strokes because it recognizes a non-decimal number to represent a dollar amount (e.g. 3 for \$3.00) and single decimal figures are converted appropriately (e.g. 3.5 is recognized as \$3.50).

NOTE: You may also click on the **Charges** tab and use the **Charge Fee** button.

To pay or forgive a fee or fine:

- First, make the patron current by typing or scanning the patron's barcode or using the **L** command to find the patron locate the patron by last name.
- Click on the **Charges** tab and make certain that the **Charges** pane is the one being viewed.
- Highlight the fee or fine to pay or forgive.

- Click on the appropriate button — **Forgive Charge** or **Make Payment**.

Date	Type	Description	Total	Balance
May 17, 2007	Fee	Overdue Charge for Marie Curie	2.10	2.10

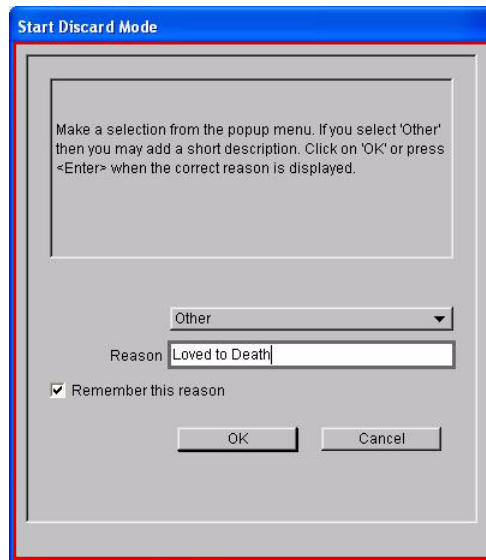
- If you click on **Make Payment**, enter the amount the patron is paying, select method of payment, etc.

- Click on **Process with Receipt** or **Process** (to process without printing a receipt).

To add a copy note to an item record:

- The item copy must be the **Current Item**.
- Type **++** and then the comment.
- Press **<enter>**.

C. Discard a Copy (2)



3. **You have spent a busy day weeding. The following books are out dated: *African Animals* (3944) and *Rubber Bands, Baseballs and Doughnuts : a Book about Topology* (3801). You also found several items that have been worn out through such heavy use that they must be discarded — *Yertle, the Turtle and Other Stories* (4877), *There's a Wocket in my Pocket* (4875), and *Southern Ghosts* (3604).**

To discard an item:

- In **Check In / Out** mode, type **2** and press **<enter>**.
- The **Discarded Copies** patron will be the **Current Patron**.
- Scan the first item and select the reason for discarding the item.

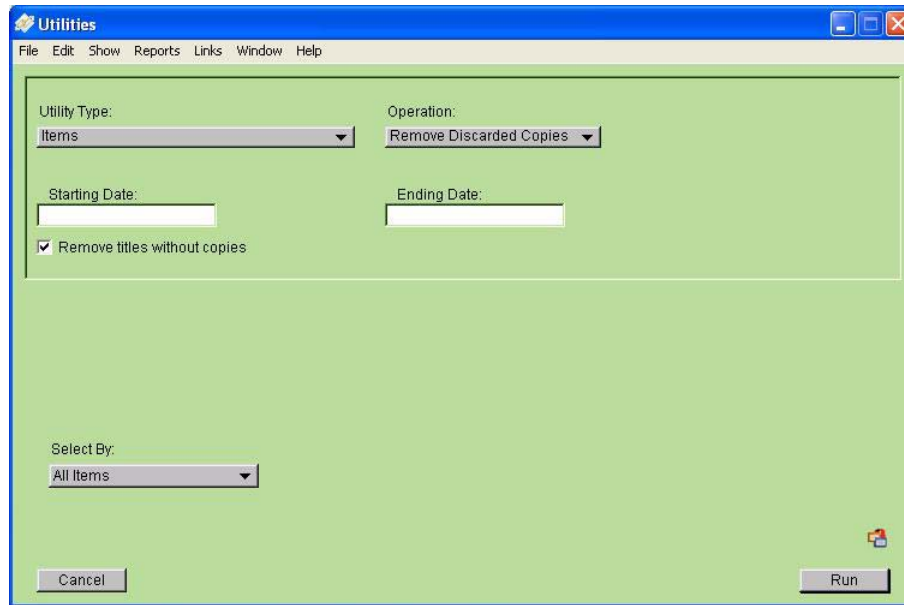
Use **Other** to be able to enter specific reasons for discard (e.g. No Use, Out Dated, Loved to Death, etc.) These reasons will be of great value if you need to reorder or replace certain titles.

NOTE: The reasons become very helpful when running reports such as the **Reordering Details** report. See **Reports** chapter for more on this report.

- Scan the rest of the items being discarded for the same reason.
- When finished with the items being discarded for that reason, type a period (.) and press **<enter>**.
- Scan first item with a different reason and enter the new reason for discarding the item.
- Scan the rest of the items being discarded for that reason.
- When finished discarding, type a period (.) and press **<enter>**.
- Type an **X** to clear the **Circulation** window.

To permanently remove lost or discarded items:

- Click on **File** on the menu bar and select **Utilities**.
- Select **Items** using the **Utility Type** drop-down menu.
- Select either **Remove Lost Copies** or **Remove Discarded Copies**.



- Limit the copies to be removed by using the **Starting Date**, **Ending Date** and **Select By** drop-down menus.
- If you want to remove titles for which there are no copies, check the **Remove Titles without Copies** box.
- Click on **Run**.

NOTES:

- Use the **Discarded Copies** patron to maintain a record of discarded items until the end of the school year if you must report the numbers of items discarded and the value of the items discarded.
- Using the **Discarded Copies** patron instead of just removing the discarded copies from each item record is faster and also provides information for reports that can be generated to assist in reordering items or in ordering more up-to-date items to replace discarded items. (See **Reports** chapter.)
- When discarding a copy that is checked out to a specific patron because of damage to the item, DO NOT check the item in first. Just check it out to the **Discarded Copies** patron and, when the **Discarded Copies Charges** window opens, charge the patron accordingly for the cost of the item.
- **Whenever running any utility, run an archive or make a backup prior to running the utility.**

5 Patrons

A. Patron Window

The screenshot shows the 'Patrons' window in a library management system. The window has a menu bar with 'File', 'Edit', 'Show', 'Reports', 'Links', 'Patrons', 'Window', and 'Help'. Below the menu bar is a toolbar with a search icon, a 'Browse By' dropdown set to 'Last Name', and a search button. The search results show 'Amstead, Lonnie Ann' with a count of 8. Below this is a 'Barcode' field with the value '1088'. There are three dropdown menus: '7th Grade', 'Active', and 'Female'. The main form area displays the patron's information: 'Lonnie Ann Amstead', '3003 Lake Shore Dr', 'Address 2', 'Salt Lake City', 'UT', and '84121'. There is a photo of the patron on the right. Below the main form are tabs for 'Personal Info', 'Notes', 'Statistics', 'Attachments', and 'Lexile'. The 'Personal Info' tab is active, showing fields for 'SSN' (520011088), 'Student #', 'School', 'Homeroom' (Wishard), '2nd Location', 'User ID' (1088), 'Password' (*****), 'Email', 'Lexile' (740), 'Graduation Date' (Jul 1, 2013), 'Grade' (7), 'Card Exp Date' (Jun 30, 2007), 'Birthdate' (Apr 7, 1987), 'Parent/Guardian', 'Phone' (555-1257), 'Fax', and 'Susp. End Date'.

B. Adding Patrons

1. Add yourself as a new staff member.

To add a patron record:

- From the **Show** drop-down menu, choose **Patrons**. (TRICK: You may also click on the **Current Patron's** name or on the words, **No Current Patron**.)
- From the **Patrons** drop-down menu, choose **New Patron**. A blank new patron record will open.
- Tab from field to field as you enter the information about this patron.
- Use the drop-down menus to indicate policy, status, and gender for the patron.
- Click on the **Notes** tab to add notes.
- If you wish to keep **Patron History** on the **Statistics** tab.

NOTE: You can use your preferences to set Alexandria to **Keep Patron History** on all patrons if that is what you want.

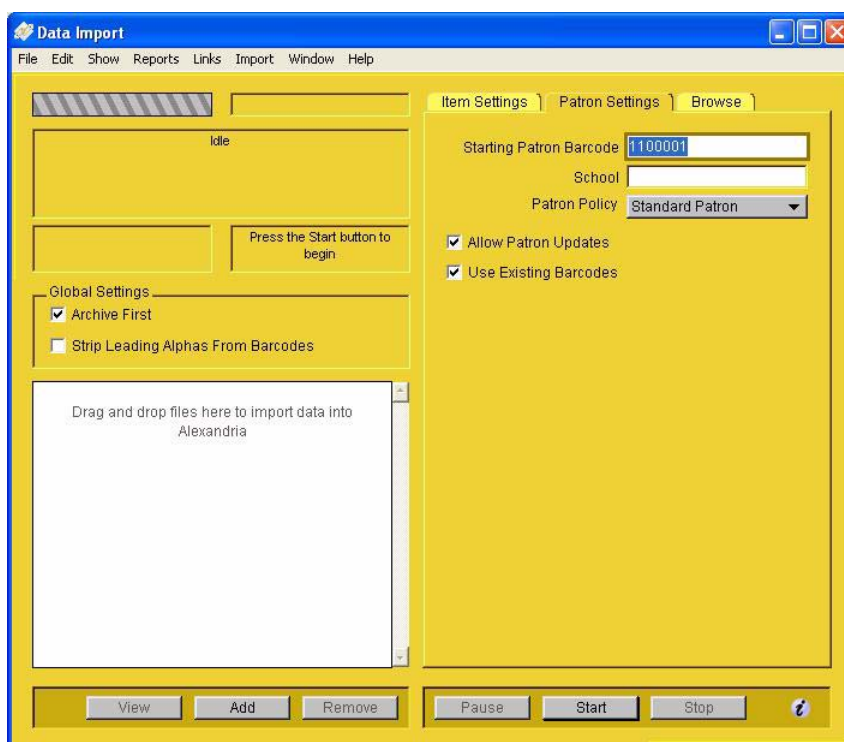
- When finished, click on the **Save** button.

C. Importing Patron Records

Patron records may be imported into Alexandria from a **tab-delimited file**. If you have a student information system that can export the data on the students in a tab-delimited format, please look the **Patron Management** window to determine what fields you wish to have included in the export.

To import patron records:

- Go to **File** on the menu bar and select **Import**.



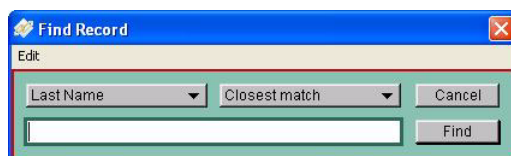
- Click on the **Patron** tab.
- Click on the **Add** button at the bottom-left of the window in order to add a file to the list.
- Use the window that opens to find and select the file to be added. Highlight the file, then click on **Open** to add it to the list.
- Set your selections for the options on the right side of the window.
- Click on **Start** at the bottom-right side of the window to begin the patron import.
- Match the fields with the information from the sample record from the file, then click on **OK**. This step tells Alexandria what fields in the import file should be enter in which fields in Alexandria.

D. Modifying Patrons

2. Change Mitchell Miller's phone number to 253-3534.

To modify a patron record:

- From the **Show** drop-down menu, choose **Patrons**.
- From the **Edit** drop-down menu choose **Find**. The window below will open.



- Make certain that the **Browse By** drop-down menu is set to **Last Name**. Type in the **Patron's** name and press **<enter>**.
- Unlock the patron's record by clicking on the **Lock** icon or by choosing **Unlock Record** from the **Patron** menu.
- Make changes to the patron's record and click on the **Save** button.

E. Deleting Patrons

3. Delete yourself from your patron list.

To remove a patron record:

- From the **Show** drop-down menu, choose **Patrons**.
- Locate and unlock the patron's record.
- From the **Patrons** drop-down menu, choose remove **Patron**.
- Click on **Remove** if the patron does not have items checked out.

NOTE: Patrons cannot be removed if they have items checked out or if they owe fines or charges. You must declare any items lost, forgive any charges or fines and, then, you will be able to remove the patron.

NOTES:

- The only required fields for a patron record are **Barcode**, **Last Name**, **Policy**, **Status**, and **Gender**.
- Alexandria will fill in the **User ID** and **Password** using the patron's last name as the **Password** and the barcode for the **User ID**.

Let's Practice:

- Add your favorite movie star as a patron.
- Assign him/her to the Staff policy.
- Include an **Alert Note** that indicates that the patron left a jacket in the library.
- Go back into the patron record and remove the **Alert Note**.
- Remove the patron.

6 Items

A. Item Window and Item Menu

Items

File Edit Show Reports Links Items Window Help

Browse By: Main Title

1730 10 5 Alaska skip

FIC CUN Fiction book

10-5 Alaska skip

Volume

Edition

LCCN 76051138

ISBN/ISSN 0913940585

of Non-Filing Characters 0

Cunningham, Bob.

Furan, Rod. / Furan, Barbara Howell.

1 Copy

Copy#	Volume	Barcode	Call#	Status	Hide	Location	Library ID Code
1		5047	FIC CUN	Checked out			CDL

Publication Subjects Categories Notes Summary Statistics Attachments SP Misc

Place Mankato, Minn.

Publisher Crestwood House

Year c1977

Extent 31 p. : col. ill. ; 24 cm.

Series

of Non-Filing Characters 0 The CB adventures of Neil Hawkins. / The CB adventures

Lexile Lexile Code From Title Match

Normal : Multiple Page

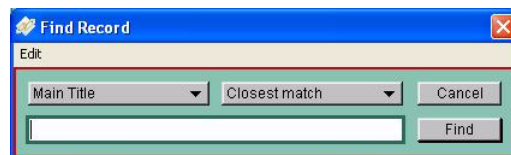
Switch to MARC View	Ctrl+M
MARC Search	Ctrl+Shift+M
Milinet Status	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Unlock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Modify Copy	
Add Copy	Ctrl+Y
Remove Copy	Ctrl+Shift+R
Move Copy To This Title	
Assign New Barcode	
Change Copy Status To	
Don't Show in Researcher	
Duplicate	Ctrl+D
Paste Item Picture	
Remove Item Picture	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A
Show Series Editor	Ctrl+Shift+S
Show ISBN Calculator	Ctrl+Shift+K
Show Standard Search Details	Ctrl+1
Show Simple Search Details	Ctrl+2

B. Finding Items

1. Find *Harry Potter and the Chamber of Secrets*.

To modify an item record:

- From the **Show** drop-down menu, choose **Items**.
- From the **Edit** drop-down menu choose **Find**. The window below will open.



- Set drop-down menu for the desired type of search.
- Enter search text and click on **Find**.

C. Adding Titles and Copies

There are two different ways to add items — manually or using MARC Search.

Manual Procedure

1. Add the book, *Across Five Aprils* by Irene Hunt with one copy.

To add an item record:

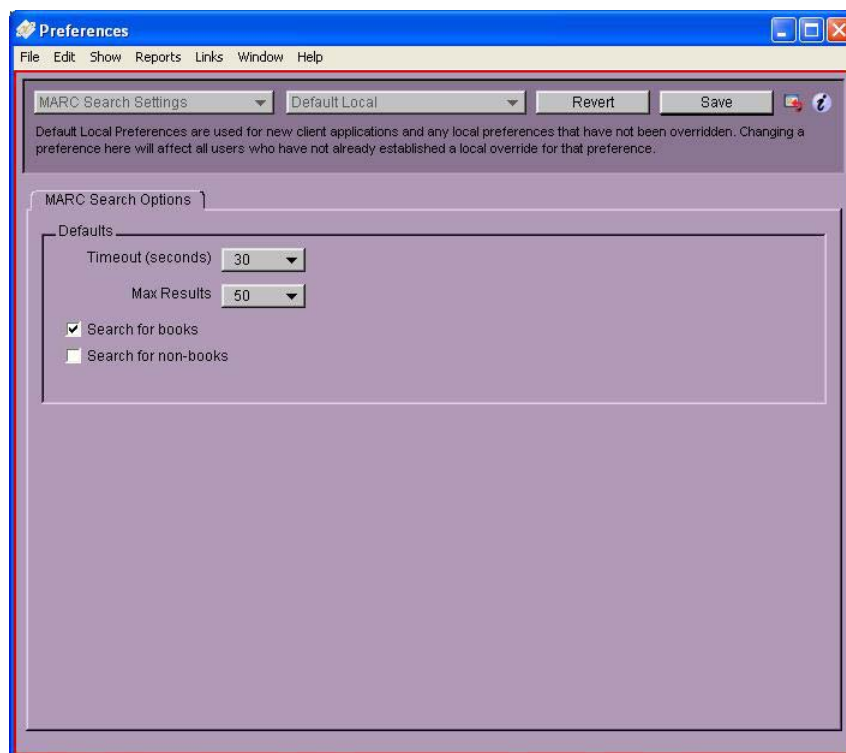
- Choose **Items** from the **Show** drop-down menu.

- Choose **New Title** from the **Items** drop-down menu.
- Tabbing from field to field, fill in the appropriate information in each field.
- Click on the tabs to move between **Publication**, **Subjects**, **Categories**, **Notes**, **SP (Study Programs)**, and **Attachments** tabs and fill in needed information on these tabs.
- When all the appropriate fields have been filled in, click on the **Save** button.
- You will be asked if you want to add a copy. If so, click **Yes** and fill in the fields on the **Copy** window. Click **Save** when finished on both the **Copy** window and the **Item** record window.

MARC Search Cataloging

First, you must use **Preferences** to set your **MARC Search** options and to select the z39.50 servers that you want to search.

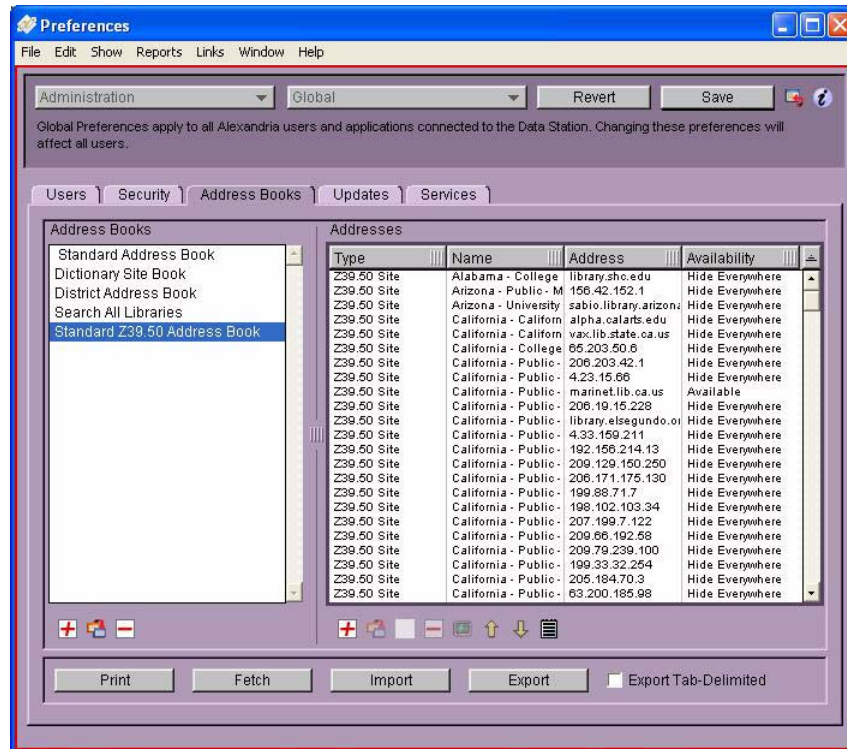
To set MARC Search preferences:



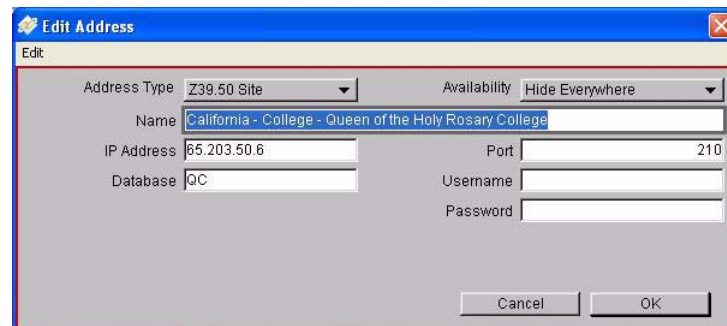
- Go to **Edit** on the menu bar and select **Preferences**.
- Change the two drop-down menus in the upper-left corner of the **Preferences** window to **MARC Search Settings** and **Global**.
- If you are not going to be searching for non-book items, take the check mark out of that box.
- Set the **Timeout** drop-down menu to the amount of time you want. (5 seconds really is sufficient!)
- Click on **Save** in the upper-right corner of the window.

To select z3950 addresses to search:

- Go to **Edit** on the menu bar and select **Preferences**.
- Select **Administration** from the first drop-down menu and **Global** from the second drop-down menu in the upper-left corner of the window.
- Click on the **Address Books** tab and select **Standard z39.50 Address Book** in the left pane of the window.



- Double click on the server you want to activate and the following window will open for that z39.50 address.



- Change the **Availability** to Available (will be seen also in **Researcher**) or Hide in Researcher (only available for **MARC Search**) using the drop-down menu and click on **OK**.
- Repeat the previous step until you have selected all the servers that you want. NOTE: There is a limit of 20!!!
- Save your **Preferences** settings and close the **Preferences** window.

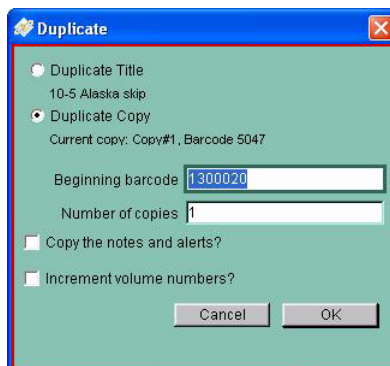
To catalog an item using MARCSearch:

- Go to the **Items Management** module by clicking on **Show** on the menu bar and selecting **Items**.
- In **Item Management**, go to **Items** on the menu bar and select **New Title**.
- Enter the **ISBN**, **LCCN**, or **Title** in the appropriate field(s).
- Go **Items** on the menu bar and select **MARC Search**.
- When the **Results** window opens, select the one you want and click on **Save**. If more than one copy of the item's MARC record is found, use the scroll bar after the title on the **Results** window to view the additional MARC records.
- Fix **Call Number** field and change the **Policy** and **Medium** drop-down menus to fit your item.
- Go to **Items** on the menu bar and select **Add Copy**.
- Fill in any information on the **Copy** window that you wish to add, then click on **Save** on the **Copy** window.
- If you have more than one copy of a title, repeat the two previous steps for each additional copy or use the **Duplicate** function.
- When all copies have been added, click on **Save** in the upper-right corner of the **Item** window.

D. Duplicating Copies or Titles.

To duplicate copies:

- Open the item record in the **Item Management** window.
- Unlock the **Item** record.
- Highlight the copy record you wish to duplicate.
- Click on **Items** on the menu bar and select **Duplicate**.



- On the **Duplicate** window, select either **Duplicate Title** or **Duplicate Copy**.
- Fill in the **Beginning Barcode** field and / or **Number of Volumes** field.

- If duplicating copies, then check any of the boxes that apply.
- Click **OK**.

E. Assigning Keywords from Circulation (V)

The **V** command enables you to quickly and easily add an entry for the same subject, bibliography, curriculum to multiple items.

To assign keywords using the V Command:

- In the **Command Line**, type **V <space>** the letter code for the desired field (such a **B** for Bibliography, **C** for Curriculum, etc.)**<space>**and the text you want entered in that field (e.g. **V B Utah Children's Book Awards 2007**) and press <enter>.
- Scan the barcodes of the items to have this keyword(s) assigned.
- When finished, type a period (.) and press **<enter>**.

NOTE: Possible areas for which this command are:

- B** — Bibliography
- C** — Curriculum
- I** — Interest/Reading Code
- S** — Subject
- R** — Study Program
- P** — Point Count
- T** — Test Number
- H** — Holding Code

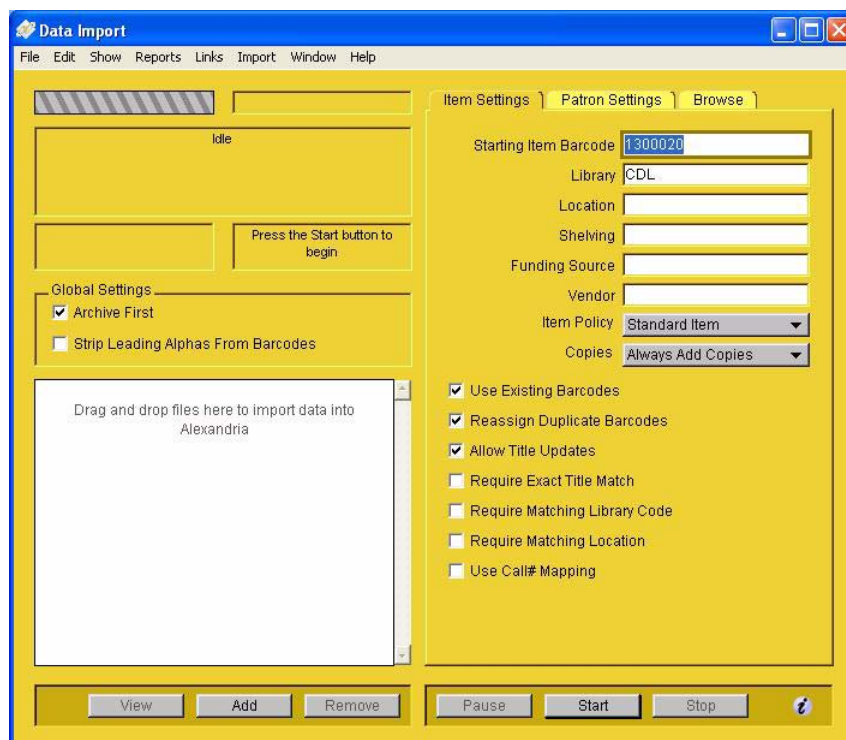
F. Importing Items from a Vendor File

To import item records from a vendor file:

Item records may be imported into Alexandria in MARC, MicroLIF, or tab-delimited formats.

- Go to **File** on the menu bar and select **Import**.

- Click on the **Item** tab.



- Click on the **Add** button at the bottom-left of the window in order to add a file to the list.
- Use the window that opens to find and select the file to be added. Highlight the file, then click on **Open** to add it to the list.
- Set your selections for the options on the right side of the window.
- Click on **Start** at the bottom-right side of the window to begin the item import.

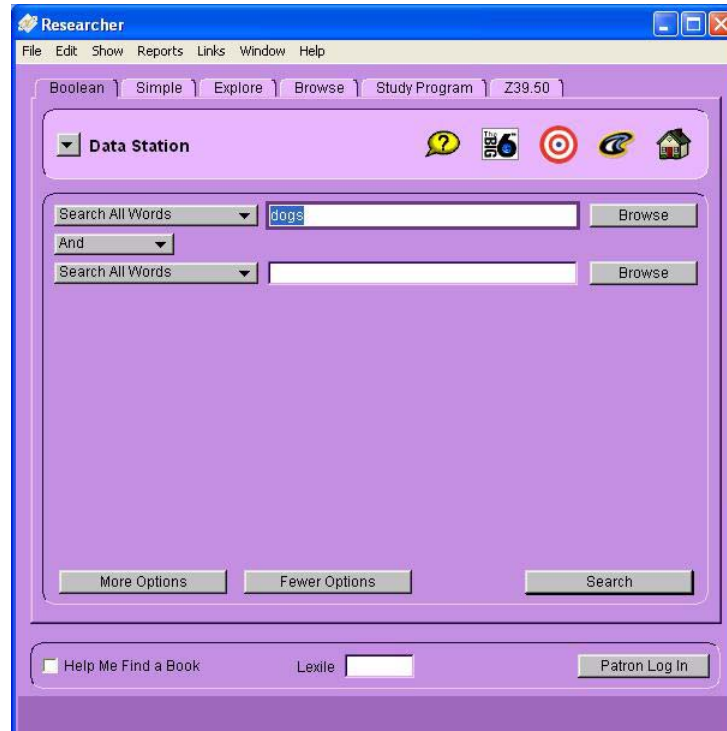
NOTES:

- Minimum fields for titles are **Title**, **Number of Non-filing Characters**, **Policy** and **Medium**. All fields except **Title** will have defaults supplied by the program. The only required field for a copy added to a title is **Barcode**.
- The **Title**, **Author** and **Series Editor** icons are to the left of the respective entry fields. Using the editors, you can easily enter multiple detailed sub fields and add new tags to any item.
- Clicking the **+** icon brings up a selection of additional types of title tags that can be added to the item record.
- Clicking the **a** icon brings up sub fields that can be added to the selected tag. A sub field can be changed to another sub field designation by clicking on the letter of the sub field and typing the desired sub field indicator.

- The - icon removes a tag completely. Leaving a sub field blank removes that sub field when the record is saved. The **Q** icon allows for quick entry of secondary authors and subject headings.
- The **Up** and **Down Arrow** icons allow you to move from sub field to sub field in each tag.
- You cannot remove items that have copies checked out until they are declared lost or discarded.

7 Researcher (OPAC)

A. Types of Search Interfaces



B. Rules of Searching

The four rules of searching Alexandria are:

- Put a period at the end of the search term. Remember that the “period/dot” command says “I’m done, this is all I want, get me out of here.” Alexandria is a “begins with search.” Using the period makes it an exact match search.

1. Search for “cat.”

- If you can’t spell, use **Browse**.

2. A student can’t spell civilization. Using Browse, enter civ.

3. Using Browse, search for “brown” -- All Words, Title, Author, etc.

- Two words typed in the same search field is the equivalent of a Boolean AND search with both words being exact match searches.

4. You want items about the Civil War.

- If you are combining Boolean AND and OR searches, the term that has to go with all (the AND search) goes last.

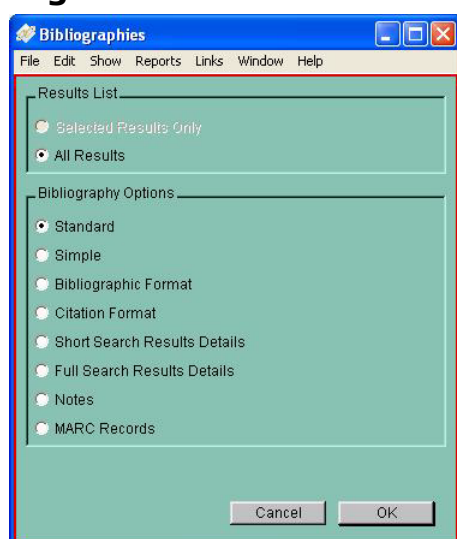
5. Search for items about Greek or Roman mythology.

C. Results Screen

a. Types of Results

b. Ordering Results

c. Printing Results



d. Save List



6. Search for dogs. Using the Search Results List, select the first 5 titles, then select every other title from the remaining titles on the list and make shorter Save List.

To pick multiple items for a Save list:

- If you want to save a block of titles, click on the first title in the group, then, holding the **<shift>** key down, click on the last title in the group.
- To select individual titles that are not in a block / group, hold the **<cmd>** key (Macintosh) or the **<ctrl>** key (Windows) and click on each of the titles you want to add to the list.
- When you have selected all the titles you want on your shorter Save List, click on the **Save List** icon.

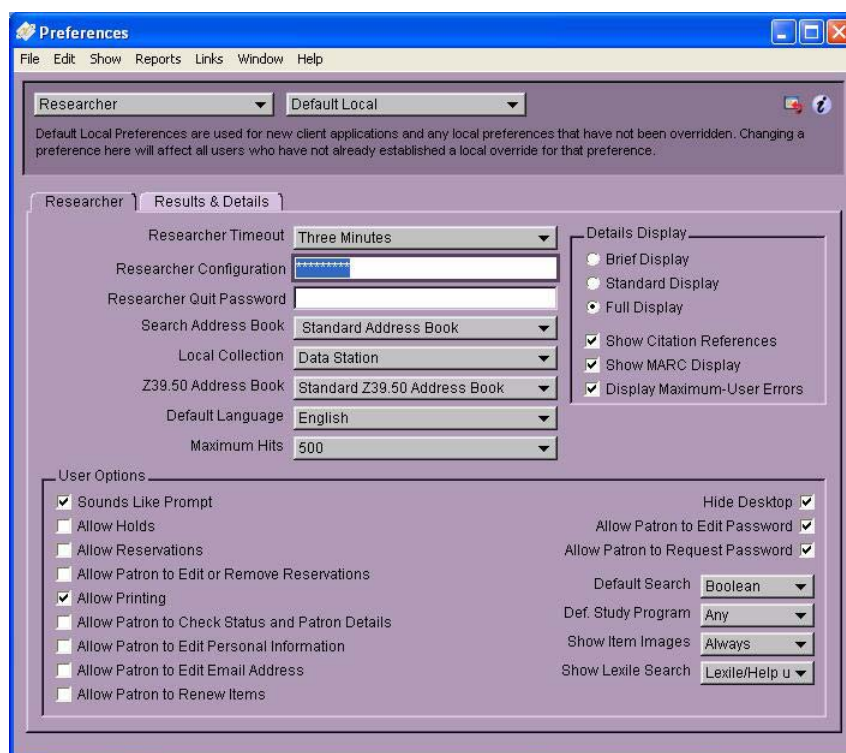
7. Return to the Researcher window and search for Cats. Select 6 items and add them to the list.

To add additional items to a Save list:

- Do your second search using Researcher.
- Highlight the desired titles in the new list that you want to add to your other list. Press **<ctrl+C>** (Windows) or **<cmd +C>** (Macintosh) to copy the titles.
- Click on the list to which you want to add the new group of titles, then press **<ctrl+V>** (Windows) or **<cmd +V>** (Macintosh) to paste the titles into this list.

D. Item Record

E. Researcher and WEB Researcher Preferences



NOTES:

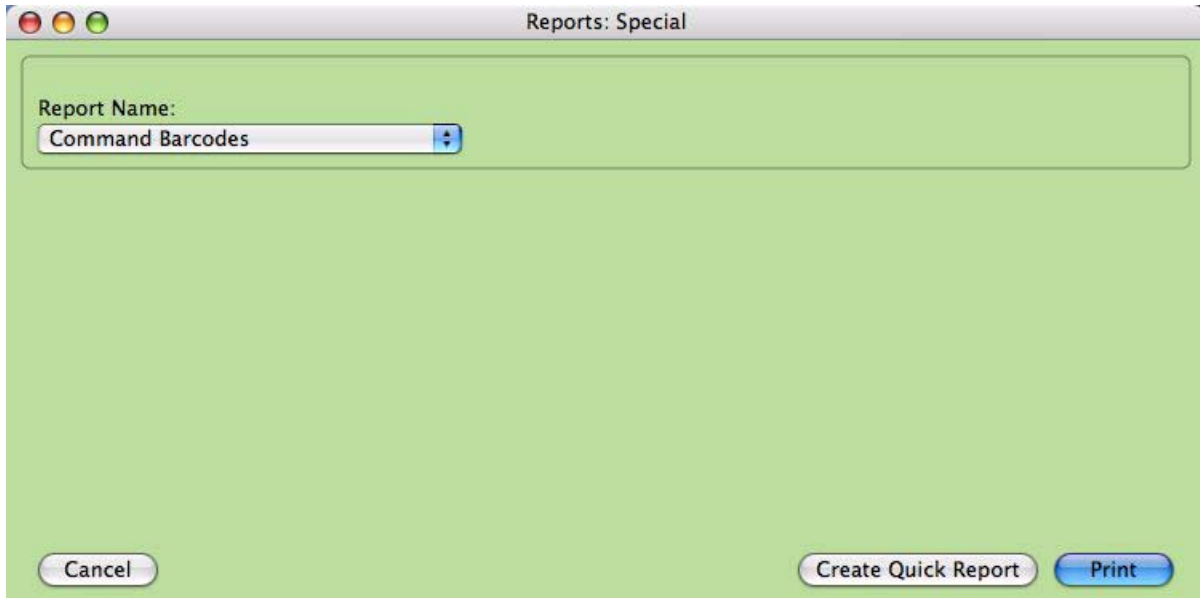
- There are free Researcher lesson plans available complete with transparency masters and worksheets. Go to our web site, <http://www.goalexandria.com> and click on **Support**, then **Librarian's Corner** and the lesson plan link is at the bottom of the center frame. Just click on the link to download the lesson plan pdf.
- You can move between fields on a **Boolean** search using the **<tab>** key.
- You can change the **Boolean** operator for an **And** to an **Or**, **Not**, or **Through** by clicking on the arrow in the field with the **And** operator and highlighting the operator of your choice.

- Use the **Through** operator to select a range of search terms such as authors starting with A - AD or call numbers 500 - 525.
- The **Simple Results List** is a series of buttons each representing a title. The **Standard Results List** is a list that displays more titles than the **Simple Results List**. The **Standard Results List** can be sorted by author, title, medium, or status.
- Holds and reservations may be made from the list in the **Standards Results List**. When a simple list is generated, holds and reservations must be done from the **Item Details** window.
- Clone your **Save List** by clicking on the **Save List** icon when you want to perform another search without losing your previous results. Clone a **Save List** when you want to modify the current list without losing your old list.

8 Reports

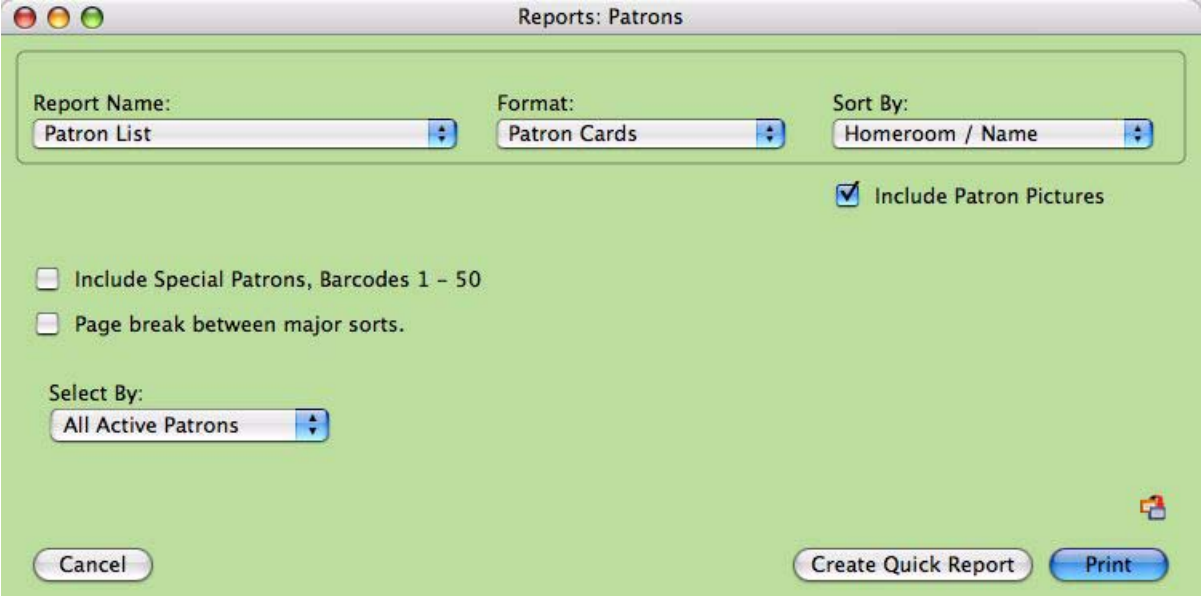
Reports are divided into groups and are accessed by clicking on **Reports** on the menu bar and selecting the appropriate reports group.

A. Special Reports



B. Patron Reports

Patron Cards



The screenshot shows a window titled "Reports: Patrons" with a light green background. At the top, there are three colored window control buttons (red, yellow, green). Below the title bar, there are three dropdown menus: "Report Name:" with "Patron List" selected, "Format:" with "Patron Cards" selected, and "Sort By:" with "Homeroom / Name" selected. To the right of these is a checked checkbox labeled "Include Patron Pictures". Below these are two unchecked checkboxes: "Include Special Patrons, Barcodes 1 - 50" and "Page break between major sorts.". Further down is a "Select By:" label followed by a dropdown menu showing "All Active Patrons". At the bottom left is a "Cancel" button. At the bottom right are two buttons: "Create Quick Report" and "Print", with a small printer icon above the "Print" button.

Reports: Patrons

Report Name: Patron List

Format: Patron Cards

Sort By: Homeroom / Name

☒ Include Patron Pictures

☐ Include Special Patrons, Barcodes 1 - 50

☐ Page break between major sorts.

Select By: All Active Patrons

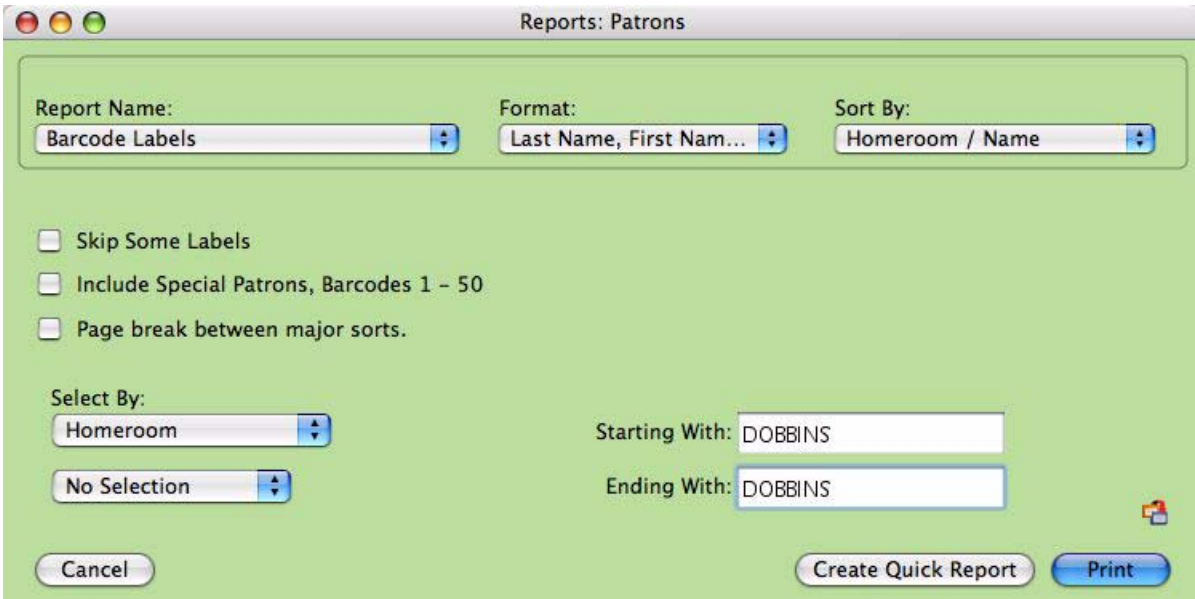
Cancel

Create Quick Report

Print

Patron Barcodes by Homeroom

For elementary schools, this report will be particularly helpful since the students generally come to the library by homeroom.



The screenshot shows a window titled "Reports: Patrons" with a light green background. At the top, there are three dropdown menus: "Report Name:" set to "Barcode Labels", "Format:" set to "Last Name, First Nam...", and "Sort By:" set to "Homeroom / Name". Below these are three checkboxes: "Skip Some Labels" (unchecked), "Include Special Patrons, Barcodes 1 - 50" (unchecked), and "Page break between major sorts." (unchecked). Further down, there are two "Select By:" dropdown menus, both set to "Homeroom", and two text input fields labeled "Starting With:" and "Ending With:", both containing the text "DOBBINS". At the bottom, there are three buttons: "Cancel", "Create Quick Report", and "Print".

- Enter the homeroom designator for a homeroom in both the **Starting With** and **Ending With** fields.
- Click on **Print**.
- After you click on **Print**, the following window opens. Type the **Homeroom** in all capital letters and press **<enter>**.



The screenshot shows a window titled "Enter custom text for the top of the labels" with a gray background. It features a text input field containing "DOBBINS". Below the input field is a barcode with the number "1000" printed underneath it. At the bottom of the window are two buttons: "Cancel" and "Print".

C. Item Reports

Weeding List

The screenshot shows a window titled "Reports: Items" with a light green background. At the top, there are three dropdown menus: "Report Name:" set to "Copy List", "Format:" set to "Weeding List", and "Sort By:" set to "Copy Call Number". Below these, there are two columns of options. The left column has a "Select By:" label followed by three dropdowns: "Copy Call Number", "And", and "Publication Year", with a "No Selection" option at the bottom. The right column has two text input fields: "Starting With:" containing "FIC A" and "Ending With:" containing "FIC GZ", followed by another pair: "Starting With:" containing "1900" and "Ending With:" containing "1985". At the bottom left is a "Cancel" button. At the bottom right are "Create Quick Report" and "Print" buttons. A small printer icon is visible to the right of the date fields.

Barcode Labels for Cataloging

The screenshot shows a window titled "Reports: Items" with a light green background. At the top, there are three dropdown menus: "Report Name:" set to "Barcode Labels", "Format:" set to "Laser Labels 3x10", and "Sort By:" set to "Copy Call Number". Below these, there is a "Number of Duplicates" field set to "1". On the left, there is a checkbox labeled "Skip Some Labels" which is currently unchecked. Below this, there are two columns of options. The left column has a "Select By:" label followed by two dropdowns: "Copy Accession Date" and "No Selection". The right column has two text input fields: "Starting Date:" containing "09012007" and "Ending Date:" containing "09042007". At the bottom left is a "Cancel" button. At the bottom right are "Create Quick Report" and "Print" buttons. A small printer icon is visible to the right of the date fields.

- Fill in the starting and ending dates for the period during which you added items for which you want to print barcodes.

Spine Labels for Cataloging

The screenshot shows the 'Reports: Items' window with the 'Spine Labels' report selected. The 'Report Name' dropdown is set to 'Spine Labels'. The 'Format' dropdown is set to 'Spine Only, Left (Larg...'. The 'Sort By' dropdown is set to 'Copy Call Number'. There are three columns of checkboxes: 'New line at \', 'Skip Some Labels', 'Include Library', and 'Include Lexile' on the left; 'Include Barcodes', 'Landscape', and 'Mitinet Import' in the middle; and 'Number of Duplicates' (set to 1) and 'Vertically Center Label' (checked) on the right. Below these are 'Select By' dropdowns set to 'Copy Accession Date' and 'No Selection', and date fields for 'Starting Date' (09122007) and 'Ending Date' (09152007). At the bottom are 'Cancel', 'Create Quick Report', and 'Print' buttons.

Report Name: Spine Labels

Format: Spine Only, Left (Larg...

Sort By: Copy Call Number

☐ New line at \'

☐ Skip Some Labels

☐ Include Library

☐ Include Lexile

☐ Include Barcodes

☐ Landscape

☐ Mitinet Import

Number of Duplicates: 1

☒ Vertically Center Label

Select By: Copy Accession Date

No Selection

Starting Date: 09122007

Ending Date: 09152007

Cancel Create Quick Report Print

- Fill in the starting and ending dates for the period during which you added items for which you want to print spine labels.

Reordering Details

The screenshot shows the 'Reports: Items' window with the 'Reordering Details' report selected. The 'Report Name' dropdown is set to 'Reordering Details'. Below this are 'Select By' dropdowns set to 'Discarded Note' and 'No Selection'. To the right are text fields for 'Starting With:' and 'Ending With:', both containing the text 'loved to death'. At the bottom are 'Cancel', 'Create Quick Report', and 'Print' buttons.

Report Name: Reordering Details

Select By: Discarded Note

No Selection

Starting With: loved to death

Ending With: loved to death

Cancel Create Quick Report Print

Top Circulating Items

Reports: Items

Report Name: Sort By:

Number of Titles: Starting Month:

Ending Month:

Select By:

Super Summary

Reports: Items

Report Name: Format: Sort By:

Inventory Start Date:

Select By:

D. Circulation Reports

Special Item Lists — Discarded Items

Reports: Circulation

Report Name: Special Item Lists Format: Discarded Copies Sort By: Call Number

☒ From Patron
☒ From Inventory

Select By: All Transactions

Cancel Create Quick Report Print

Loaned Items

Reports: Circulation

Report Name: Loaned Items Format: 1 Line Sort By: Patron Homeroom / Name

☒ Page break between major sorts.

Select By: All Transactions

Cancel Create Quick Report Print

Posting List – Detailed

Reports: Circulation

Report Name: Format: Sort By:

☒ Include Charges

☒ Page break between major sorts.

Select By:

Letters to Parents

Reports: Circulation

Report Name: Format: Sort By:

☒ Include Charges ☐ Show Patron's Barcode
☐ Calculate Overdue Fines ☐ Show Patron's Locations
☒ Show Replacement Cost ☐ Show Patron's Phone Number

☒ Page break between major sorts.

Select By:

E. Statistics Records

Usage by Period

The screenshot shows a window titled "Reports: Statistics Records" with a light green background. At the top, there are three dropdown menus: "Report Name:" set to "Usage by Period", "Format:" set to "By Day of the Month", and "Sort By:" set to "Entire Range". Below these, there is a "Select By:" dropdown menu set to "All Statistics". At the bottom, there are three buttons: "Cancel", "Create Quick Report", and "Print". A small icon of a document with a red 'X' is visible in the bottom right corner.

Usage by Item/Patron Policies

The screenshot shows a window titled "Reports: Statistics Records" with a light green background. At the top, there are three dropdown menus: "Report Name:" set to "Usage by Item-Patron Policy", "Format:" set to "By Month", and "Sort By:" set to "Entire Range". Below these, there is a "Select By:" dropdown menu set to "All Statistics". At the bottom, there are three buttons: "Cancel", "Create Quick Report", and "Print". A small icon of a document with a red 'X' is visible in the bottom right corner.

NOTES:

- Reports print to the screen first. You must go to **File** on the menu bar and select **Print** to actually print the report.
- In a Central Union system, you must also **Select By Library** (**Item** and **Circulation** reports) or by **School** (**Patron** reports).

9 Policies and Preferences

To access **Policies** and **Preferences**, choose **Preferences** from the **Edit** drop-down menu.

A. Administration, Users & Security, Address Books, Updates and Services

B. Authority Control

C. Calendars

1. **On the Standard Calendar, for next year, close all of July and August and set a Period Due Date for the third Friday in May.**

D. Circulation, Letters, Miscellaneous, Barcodes

E. Display Settings, Miscellaneous

F. Item Management, Catalog, Leading Articles, Default Item Pictures

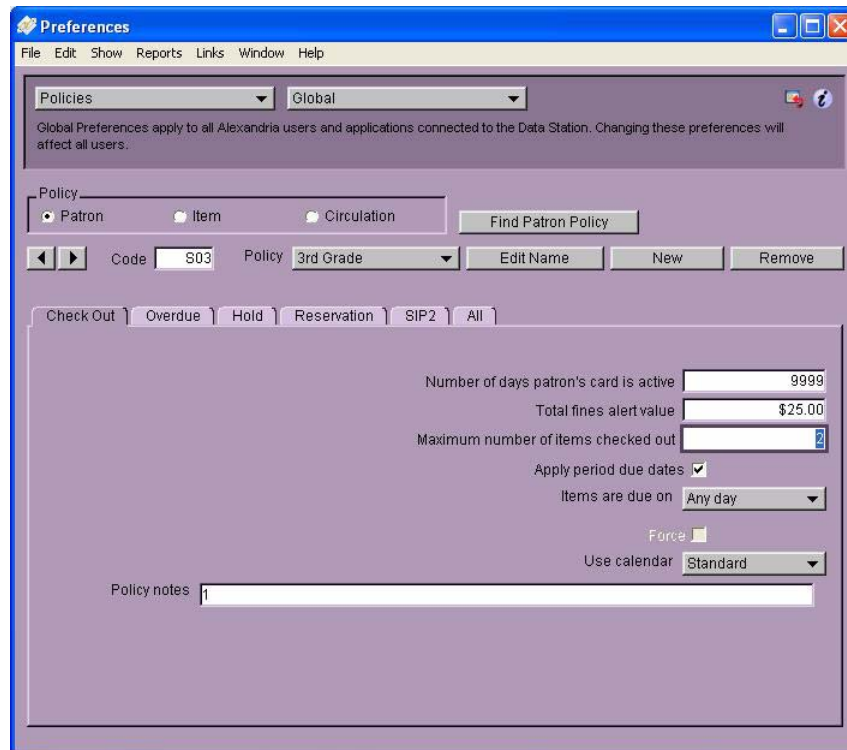
G. Library Information, Email, School, Search Add-Ons

H. MARC Search Settings

I. Orders, Claim Letter

J. Patron Management, Default Patron Pictures, Grade Table

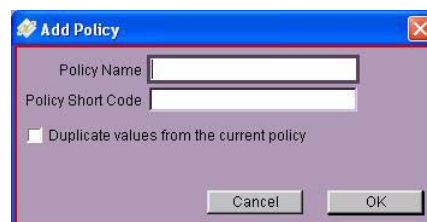
K. Policies - Patron, Item, Circulation



2. Set up a Patron Policy for 6th grade students with a Policy Code of S06.

To create a new policy:

- Click on **Edit** on the menu bar and select **Preferences**.
- Set the two drop-down menus in the upper-left corner of the **Preferences** window to **Policies** and **Global**.
- Click the appropriate button for **Patron**, **Item**, or **Circulation** policy.
- Click the **New** button.
- Give the policy a name and a short code in the **Policy Name** field and the **Policy Short Code** field and click on **OK**.



- Work your way through each tab and the **Policy** options on each tab making the selections you want.
- When finished, click on the **Save** button.

L. Researcher, Results & Details

M.Routes

N.Scheduled Events

O.Sounds

P. Web

Q. Word Processor

NOTES:

To change a patron or item to a new policy, use the Utilities mode.

10 Alexandria Quick Start Checklist

For those who have not set up Alexandria, the following is an ordered checklist of what to do in the order you should do those things:

K. Install Alexandria

L. Import Patrons and Items

M. Set Preferences and Policies

- a. Scheduled Events — Global**
- b. Library Information — Global and Default Local**
- c. Calendars — Global**
- d. Policies — Global**
- e. Circulation — Global and Default Local**
- f. Item Management — Global and Default Local**
- g. Patron Management — Global and Default Local**
- h. Researcher — Default Local**
- i. WEB — Global**

N. Run Utilities

- a. Patron Utilities to put patrons on correct policies and in correct homerooms.**
- a. Item Utilities to put items on correct policies.**

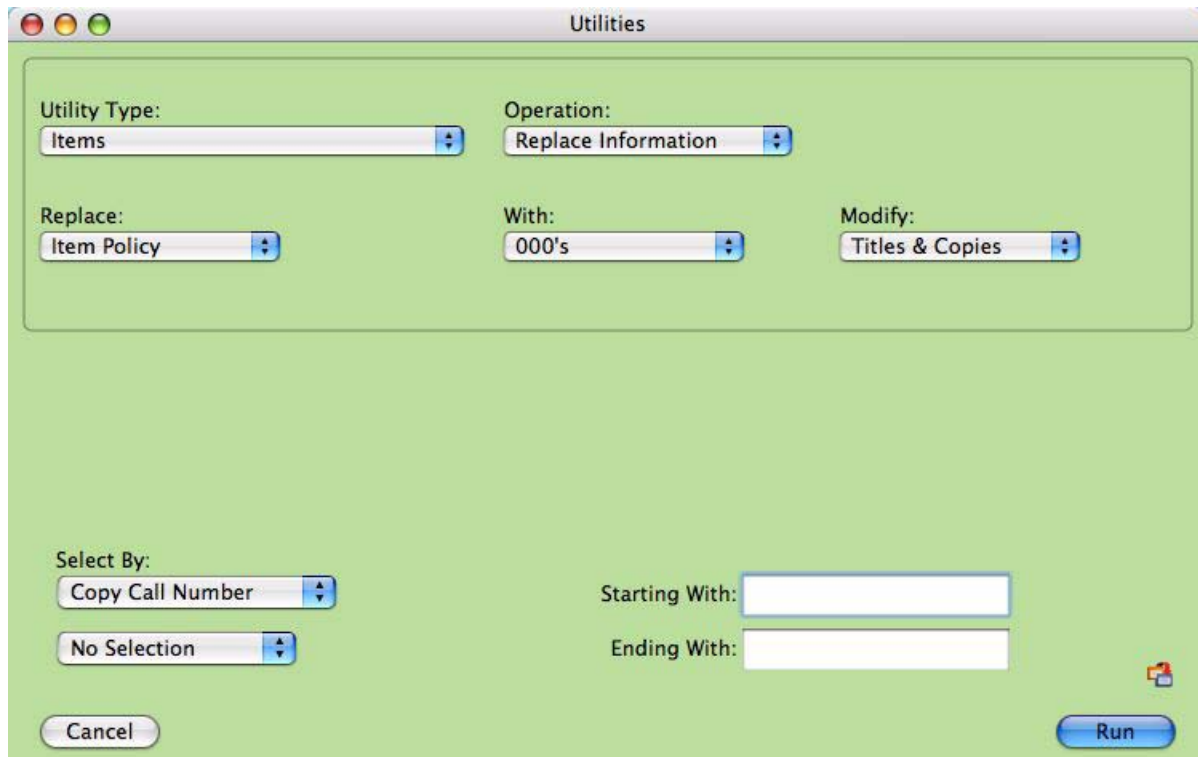
O. Questions or Problems? — Call Tech Support

NOTES:

Remember, you must have your policies established before you can run the utility to change items or patrons to a different policy.

Remember, if you are asked whether or not you want to archive, the answer is always **Yes**.

To change items to a new policy:

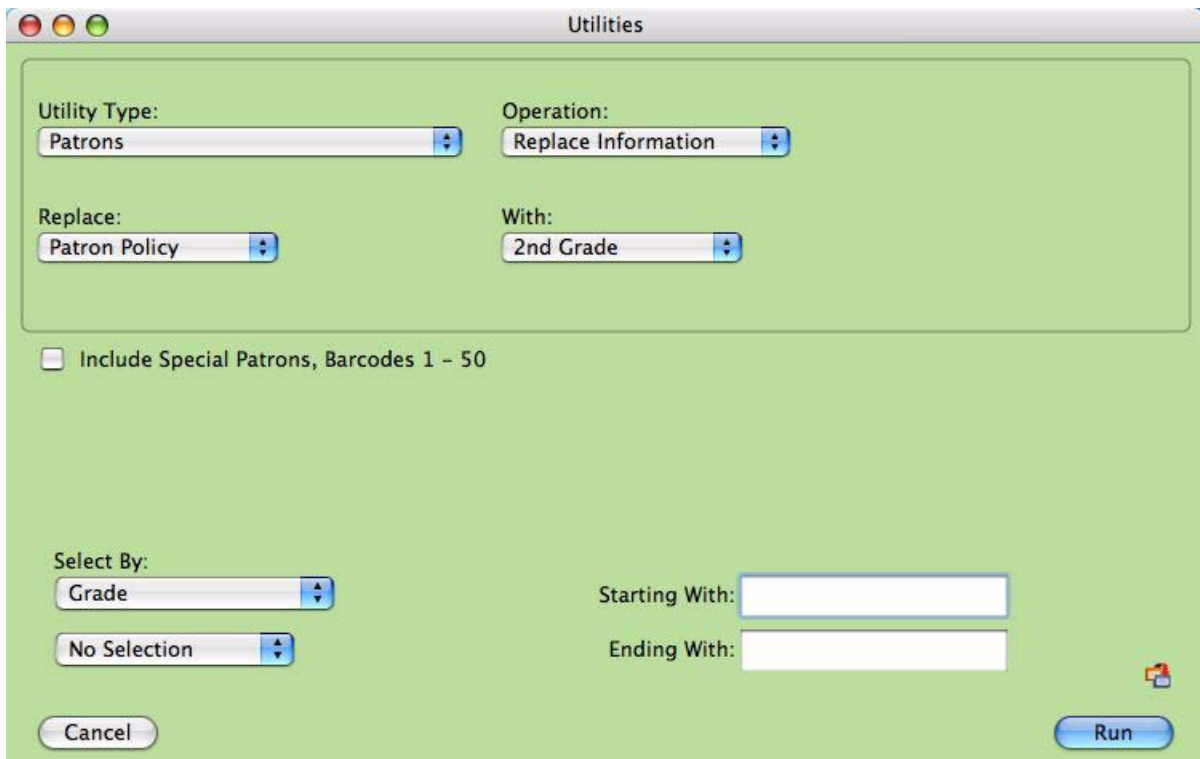


The screenshot shows a window titled "Utilities" with a green background. It contains the following fields and controls:

- Utility Type:** A dropdown menu set to "Items".
- Operation:** A dropdown menu set to "Replace Information".
- Replace:** A dropdown menu set to "Item Policy".
- With:** A dropdown menu set to "000's".
- Modify:** A dropdown menu set to "Titles & Copies".
- Select By:** A dropdown menu set to "Copy Call Number".
- No Selection:** A dropdown menu option.
- Starting With:** An empty text input field.
- Ending With:** An empty text input field.
- Buttons:** "Cancel" at the bottom left and "Run" at the bottom right.

- Go to **File** on the menu bar and select **Utilities**.
- Set the drop-down menu for **Utility** type to Items.
- Set the **Operation** to Replace Information.
- Set the **Replace** to the type of information you want to replace and the **With** to what you want to have the current information in that area replaced with.
- Set the **Select By** to the desired criteria and fill in the **Starting With** and **Ending With** fields with the appropriate information.
- Click on **Run**.

To change patrons to a new policy:



- Go to **File** on the menu bar and select **Utilities**.
- Set the drop-down menu for **Utility** type to Patrons.
- Set the **Operation** to Replace Information.
- Set the **Replace** to the type of information you want to replace and the **With** to what you want to have the current information in that area replaced with.
- Set the **Select By** to the desired criteria and fill in the **Starting With** and **Ending With** fields with the appropriate information.
- Click on **Run**.

NOTE: Remember, if you are asked whether or not you want to archive, the answer is always **Yes**.

Alexandria v5 Circulation Commands

AS	Start Self Service Check Out Mode	Q {barcode}	Patron or Item Status
B {Item Barcode}	Set Bookdrop Mode	QE	Show Renew Window May select which items to renew
C {Call Number}	Locate a Title by Call Number	R {Item Barcode}	Start Renewal Mode R3000 — Renew item 3000 Renew All
E {Subscription Code}	Receive Subscription	RA	Locate Item by Title T Bambi — Locate Bambi
F {Amount} {Comment}	Record a Fine or Fee F 3 Water Damage on #3000	T {Title}	Change Item Policy Change Patron Policy
G {Item Barcode}	Place a Forward Reservation G3000 — Reservation on item 3000 Set to Reservation Checkout Mode	UI {Item Policy Code} UP {Patron Policy Code}	Restore Previous Policy
GG		UR	
H {Item Barcode}	Place a Hold Request for a Title H3000 — Place a Hold on Item with barcode 3000	V Category Keyword	Catalog Items — Assign Keywords)
HC {Item Barcode}	Place a Hold Request for a particular copy	X {Barcode}	Make Patron or Item Current or Clear
I {Date}	Set Inventory Mode	Y	Start Statistics Mode Computes statistics as a 1-day checkout, use for “in-house” usage
IB {Date}	Set Inventory/Bookdrop Mode		Clear Transaction Log
J {Item Barcode}	Reserve Request	Z	Set Override Date
K {Item Barcode}	Recall Item K3000 —Mark item 3000 for recall	.mmddy	
L {Last Name} or LF {First Name}	Locate Patron by Last (or First) Name	/Old Barcode =New Barcode .	Change Barcode Number Clear Override Date
M {Route Code} {= Item Barcode}	Issue Routing Slip	.	Set Check In/Out Mode
NC Item Location	Set Location for Item Copies	=	Perform Current Mode for Current Item
NP Patron Location	Change Patron Location (Homeroom)	+	Show Patron Notes
O Barcode	Automatic Overnight Checkout of Item	++	Show Item Notes
P {Patron Barcode}	Set Patron	+++	Print Transaction Log

