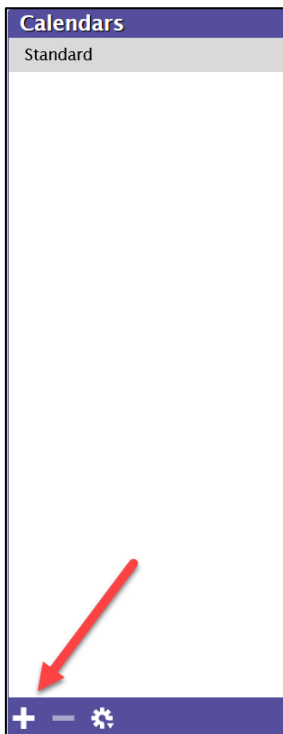


Alexandria Start the School Year

Updating the Calendar

Your Alexandria Calendar, along with your Policies, controls when items will be due. When starting the year, you can mark days in your Calendar when your library will be closed.



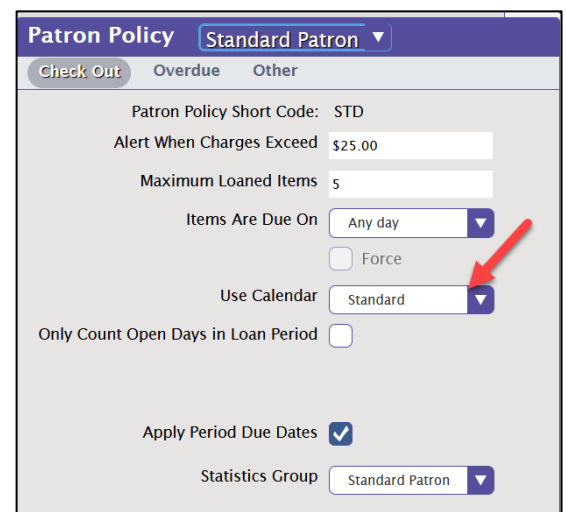
To view and edit your Calendars, click on Tools, then Calendar. If you are using an older version of Alexandria, you will find Calendars in Preferences.

You will see a Standard Calendar, which you can edit. You can also create new calendars by clicking the plus icon.



Clicking on a day in the calendar changes it from Open to Closed. If you click on a date again, it will be set to the Period Due date, the date on which all items will be due back to the library, regardless of checkout period. Clicking the date a third time will set it back to Open. To close a certain day of the week for the entire month, you can click on the column header for that day.

After creating and editing your calendars, you will need to assign them to patron types in Policies. Go to Tools, then Policies, or Preferences, then Policies, depending on your Alexandria version. For each type of patron, you will want to assign them a calendar. You can create different calendars for different patron types, or use the same calendar for all of your patron types, depending on your needs.



Updating Policies

The beginning of the year is a good time to review your patron and item policies in Alexandria and make any needed changes. Your policies control your checkout periods, overdues, fines, and holds. Go to Tools, then Policies, or Preferences, then Policies.

The screenshot displays two side-by-side configuration panels under the 'Exceptions' tab. The left panel is titled 'Patron Policy' and is set to 'Standard Patron'. It features tabs for 'Check Out', 'Overdue', and 'Other'. The 'Check Out' tab is active, showing fields for 'Patron Policy Short Code' (STD), 'Alert When Charges Exceed' (\$25.00), 'Maximum Loaned Items' (5), 'Items Are Due On' (Any day), a 'Force' checkbox, 'Use Calendar' (Standard), 'Only Count Open Days in Loan Period' (checked), 'Apply Period Due Dates' (checked), and 'Statistics Group' (Standard Patron). The right panel is titled 'Item Policy' and is set to 'Standard Item'. It also has 'Check Out', 'Overdue', and 'Other' tabs, with 'Check Out' active. Fields include 'Item Policy Short Code' (STD), 'Loan Fee' (\$0.00), 'Default Replacement / Purchase Cost' (\$20.00), 'Maximum Renewals for Item' (1), 'Hard Due Date' (mm/dd/yyyy), 'Statistics Group' (Standard Item), and a 'Transaction Period' of 14 Days. Both panels have a 'Notes' section at the bottom and a footer with 'Add', 'Remove', 'Duplicate', and 'Rename' actions.

You can view the policies for different patron types and item types by clicking on the dropdown menu next the standard patron and standard item. If you make any changes, don't forget to Save.

Importing Student Records

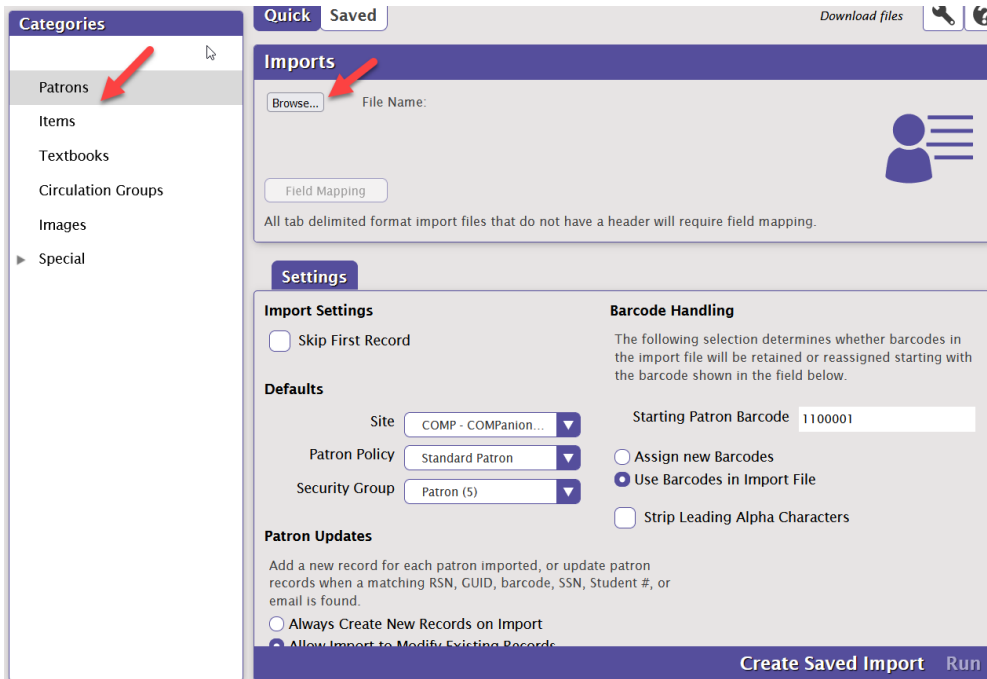
If you are able to get a tab delimited file from your student information system, you can import it into Alexandria to create accounts for new students, and update accounts for existing students.

You will find the Import button on the Dashboard page.

Select Patrons, then click Browse to find your saved tab delimited file. Make your selections, and then click Run to import your file.



Import



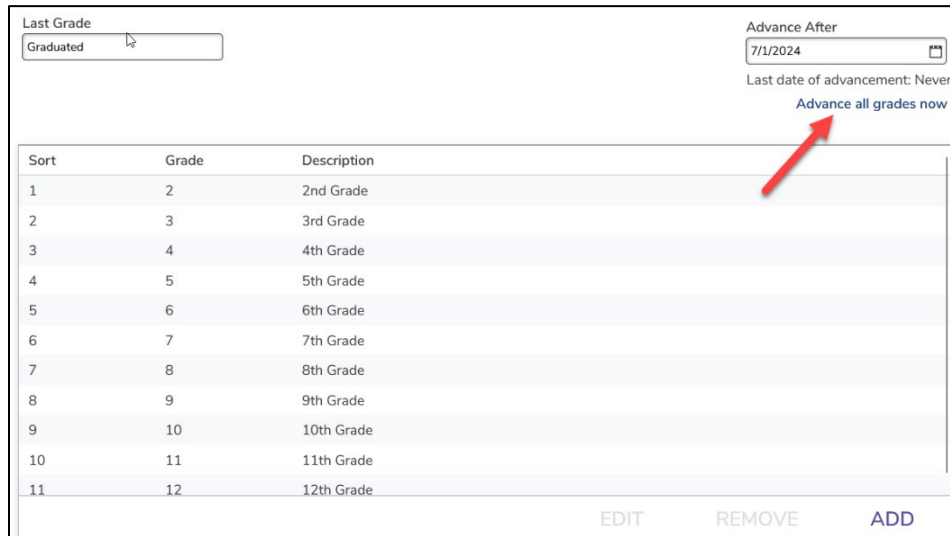
More information about importing patron records can be found here:

<http://support.companioncorp.com/display/ALEX/Patron+Imports+Best+Practices>.

Updating the Grade Table

If you do not import your patron records but instead enter and update them manually in Alexandria, updating the grade table can advance all students to the next grade.

To update the grade table, go to Preferences, the Patrons, then Grade Table.



The screenshot shows a web interface for updating the grade table. At the top left, there is a dropdown menu for 'Last Grade' with 'Graduated' selected. To the right, there is an 'Advance After' date field set to '7/1/2024' and a note 'Last date of advancement: Never'. Below this is a blue link 'Advance all grades now' with a red arrow pointing to it. The main part of the interface is a table with the following data:

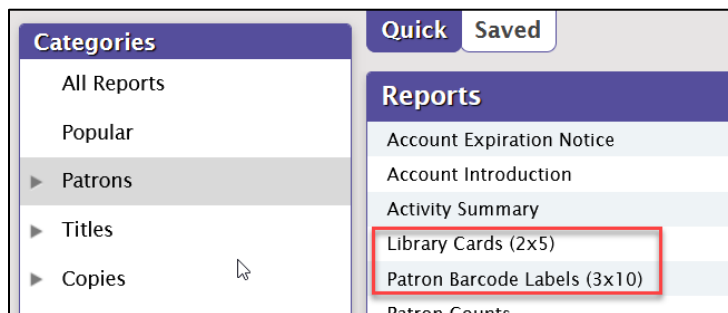
Sort	Grade	Description
1	2	2nd Grade
2	3	3rd Grade
3	4	4th Grade
4	5	5th Grade
5	6	6th Grade
6	7	7th Grade
7	8	8th Grade
8	9	9th Grade
9	10	10th Grade
10	11	11th Grade
11	12	12th Grade

At the bottom right of the table, there are three buttons: 'EDIT', 'REMOVE', and 'ADD'.

Click Advance all grades now to advance all students to the next grade. This cannot be undone, and should only be done once per year. Students in the last grade level will be advanced to Graduated.

Creating Library Cards or Student Barcodes

You can use the Library Cards or Patron Barcode Labels reports to create library cards or barcode sheets for easy checkout. You will find both of these in the Reports section, under Patrons.

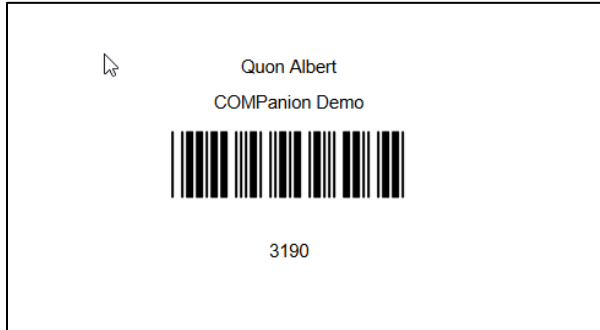


The screenshot shows a navigation menu on the left with 'Categories' and 'Patrons' selected. On the right, there is a 'Reports' section with a list of reports. The 'Library Cards (2x5)' and 'Patron Barcode Labels (3x10)' reports are highlighted with a red box.

Categories
All Reports
Popular
Patrons
Titles
Copies

Quick	Saved
Reports	
Account Expiration Notice	
Account Introduction	
Activity Summary	
Library Cards (2x5)	
Patron Barcode Labels (3x10)	
Patron Counts	

The Library Cards report will generate 2 x 3.5 inch library cards that you can print on cardstock or labels, or regular paper.



The Patron Barcode Labels report will generate smaller labels with the student name and barcode. It has a similar setup process to the Library Cards Report.

To set up the Library Cards Report, make your selections in the Selections tab to determine how to select the student accounts that will display on the report.

Selections Options

Create customizable library cards for patrons. This report is formatted for common business card stock or shipping labels that are 2 x 3.5 with 10 per sheet (Avery 5371).

Patrons with a Status of

Accounts Expiring From MM/DD/YYYY Through MM/DD/YYYY

Patrons in Security Group

Patrons with a Policy of

Patrons from From Through

Patrons in Grade From Through

Patrons added From MM/DD/YYYY Through MM/DD/YYYY

Coming soon, this report will be accessed via 'Labels' instead of 'Reports.'

Show Additional Selections

The Options tab allows you to choose what will print on each library card. You have up to six spaces to print information from the Data dropdown menu.

The screenshot shows the 'Options' tab of a report configuration window. At the top, there are two tabs: 'Selections' and 'Options'. Below the tabs, there are several settings: 'Sort by' is set to 'Last Name', 'Format' is set to 'No Picture', and there is a checkbox for 'Add 'P' to Barcode'. The main area is divided into two sections. On the left is a preview of a library card with four rows: 'First Last Name', 'Site (Name)', 'Barcode Image', and 'Barcode Number'. On the right are configuration options for each row: 'Data' (set to 'First Last Name'), 'Size' (set to 'Small (1 Row)'), 'Justification' (set to 'Center'), 'Color' (set to black), and 'Bold' (checkbox). A red arrow points to the 'Data' dropdown menu. At the bottom, there are two buttons: 'Create Saved Report' and 'Run'.

When you have your report set up the way that you'd like, click Run. You can also click Create Saved Report to save your setup options to run again in the future. After running the report you will find a PDF in Operations that you can download and open for printing.

Alexandria Help

<http://support.companioncorp.com/display/ALEX/Beginning-of-Year+Procedures>

SCKLS Help

lisa@sckls.info