

v6 Preferences Webinar

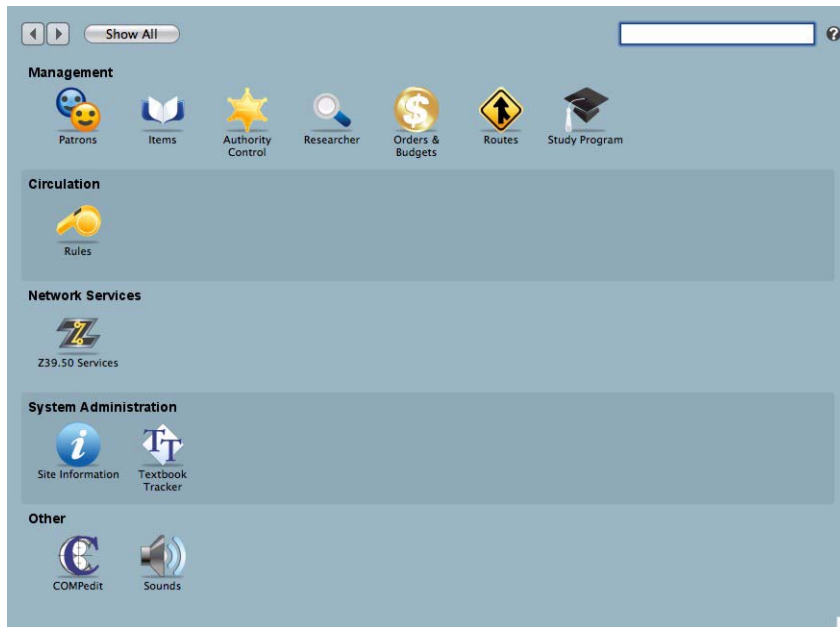
A. Kinds of Preferences

Edit	Show	Tools	Links
Can't Undo			⌘Z
Can't Redo			⇧⌘Z
Cut			⌘X
Copy			⌘C
Paste			⌘V
Clear			
Select All			⌘A
Spelling			
Find			⌘F
Find Again			⌘G
Filter			
Paste From File			
System Preferences			⌘;
User Preferences			⌘⌘;
Machine Preferences			

System Preferences



User Preferences



Machine Preferences

Currently, the only preference group available as a **Machine Preference** is **Slip Printer**.

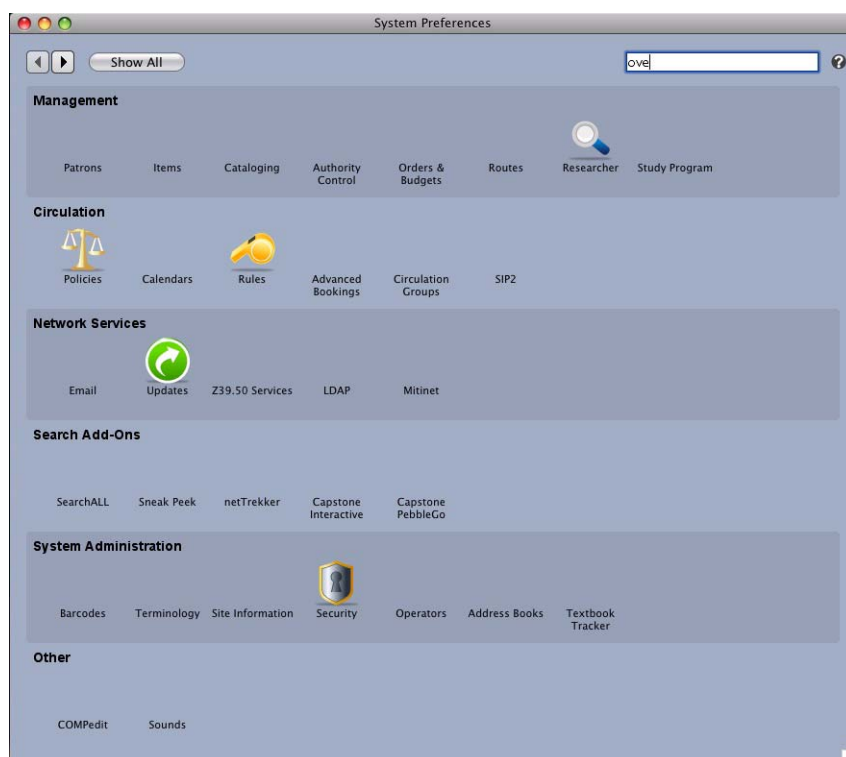
B. Navigating

Categories

Preferences are divided into various groups in order to make locating the desired preference group much easier.

Search Feature

Start typing a search term representing the preference you want to find in the field in the upper-right corner. Notice that some of the icons are greyed out. Those remaining have that term within the preference group. This facilitates finding the preference you want to set.



C. Changes

Terminology

Library has been changed to **Site**.

MARC Search has been enhanced and is referred to / reached through **Add Title Assistant**. This is available to customers having A licenses.

User has been changed to **Operator**.

Security Levels has been changed to **Security Groups**.

Policy Mapping

Call Number Mapping has been changed to **Policy Mapping** and has been moved from a **Policies** preference setting to **Management — Cataloging — Policy Mapping** tab.

Enable Automatic Email Notifications

This preference setting has moved from the **Library Information** preferences to the **Rules** tab of the **Rules System Preferences** in the **Circulation** category.

Auto-Hide

Auto-Hide tab has been moved from **Item Management** to **Researcher System Preferences**.

Study Programs

Lexile tab has been moved from **Patron Management** preferences to **Study Programs**.

Barcodes

All barcode-related preferences are grouped under the **Barcodes** preferences group.

Search Add-Ons Category

The add-ons such as netTrekker all have their own preference groups in this category.

Terminology

All terminology preferences are now grouped together in the **Terminology** preferences setting. In addition, the **Localization** preferences (date order and monetary format and symbols) are also listed in this **System Preferences** group.

Web Setting Tab

The old first tab of the **Web** preferences is now a tab in **Site Information** preferences.

Rebuilds and Archives Now in Utilities

We will discuss setting up and scheduling these two utilities. You will still set the **Archives to keep** in **System Preferences (System Administration category--Site Information group -- Scheduled Events tab)**

D. New Features

Items

Enable **Add Title Assistant**. Check this box to take advantage of the **Add Title Assistant** feature.

Local Call Number Tag []
Examples: 852 h ; 852 k h ; 099 ab

- Preserve Existing Call Numbers
- Require Matching Copy Site Code on Import
- Prefer LC Call Numbers
- Uppercase call numbers
- Show Statement of Responsibility in the Title Field of the Items Window
- Enable Add Title Assistant

(Must match Library ID Code set in the Library Information tab)

Researcher

Display Copyright in Results — This is now an option on the **Interface** tab

Allow iPhone Support — This preference setting is on the **Rules** tab.

Policies

Check Out Tab — Stat Groups

Notice that there is now a drop-down menu for setting the **Stat Group**. Be very careful that when you are trying to change to a different policy that you are changing the **Policy** drop-down menu up in the gray area of the window and not the **Stat Group** drop-down menu by mistake. When items are checked out by patrons on this policy, the statistics will be recorded under the **Stat Group** that has been selected.

Overdues Tab — Declare Lost when Overdue ____ Days.

This setting allows you to have Alexandria automatically change the status of an item to **Lost** after the specified number of days. This can be quite a “shock” message to patrons that will help motivate them to return those long-overdue items. If you do not want Alexandria to do this, then enter **9999** in the field.

Other Tab -- Electronic Resources Check Box

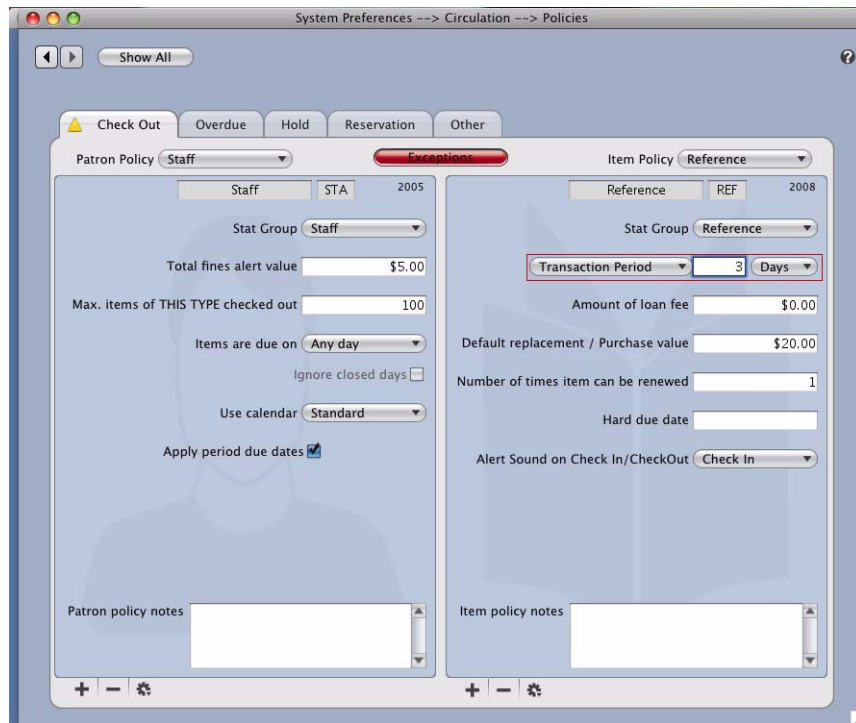
Use this option to indicate that the item is an electronic resource.

Making Exceptions to Policies

Think of the setup on the **Policies** window like that of the old **Circulation Policies** tab.

- Click on the **Patron Policy** drop-down menu and select the policy to be modified.
- Click on the **Item Policy** drop-down menu and select the policy to be modified.
- Click on the **Exceptions** button on the middle of the gray area. Clicking on this button will change its color to red.
- Change all values for the policy that you wish to have changed for the patron-item policy combination (i.e. **Transaction Period**).

- Click on **Save** to save changes. A red box will now appear around the field where the exception has been entered.



- Click on the **Exceptions** button again and it will change to yellow. A yellow triangle **Alert** icon will appear on any tab with an exception for the patron-item policy combination currently in view.



Calendars

Note that the calendars that you have established show in the list in the left pane. Navigating in this preference group is done by highlighting the desired calendar in the left pane so you can edit it in the right pane or use the **Delete** (-) icon at the bottom of the left pane to delete the highlighted calendar.

Add a new calendar by using the **Add** (+) icon at the bottom of the left pane.

Use the **Actions** menu icon  to rename a calendar.

Rules

User Interaction Tab

Clear Patron and Items Panes on Time Out — This option allows you to set a length of time after which the **Patron** and **Item** panes and the **Transaction Log** will be cleared automatically.

Display Copy Condition —You will probably not want to check this option.

Current Patron Alerts — Check this option and any of the options listed to have an alert when that patron is made the **Current Patron**.

Rules Tab

Don't show overdue notice when in Bookdrop mode

Email Librarian on In-stock Hold — Checking this option will cause an email to be sent to the librarian when an in-stock hold is placed.

Email Librarian on Reservation — If this option is checked, the librarian will be emailed when a reservation is placed.

Days to Look Ahead for Reservation Notice — Fill in the number of days before a reservation to tell Alexandria when to send a reminder notice about the reservation.

Enable Deferred Refunds — This allows the librarian to have a credit created instead of generating a refund of payment for a lost item.

Receipts Tab

Number of Receipt to print (checkout, in-stock, monetary transactions) — You may now enter the number of receipts to print for these types of transactions.

Print receipt number on monetary receipts — If this option is checked, then monetary receipts will be numbered when printed.

Hide patron's barcode on receipts

Letters Tab

Note that there are many more letters than in the past for which you can determine the text.

Condition Codes

Condition Codes may not be something that you will want to use in the library situation, but the option is there to create and use condition codes.

Damage Codes

You may establish damage codes with set fees for the damage type which you may charge when an item is damaged by using the **DL** code in **Circulation**.

Circulation Groups

You may establish **Circulation Groups** to be used in **Circulation** when items are checked out. One of the advantages of using **Circulation Groups** is that you can produce a list of items checked out by a group of patrons who may come from many different homerooms (Example: an English teacher in the high school brings in a group to check out books for book reports and wants a list of the kids and the books they have checked out).

LDAP

Lightweight Access Directory Protocol

Site Information

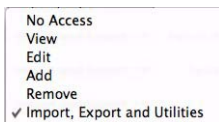
Site Tab

Notice that there is a field for giving information about days open, hours, etc.

Security

Highlight a **Security Group** in the left pane. Notice that there are three tabs in the right pane on which the different areas for which you may choose security settings are shown.

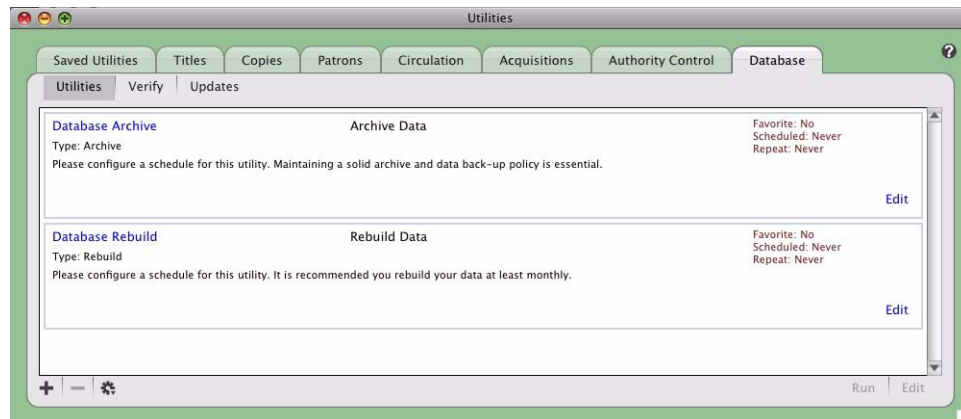
When selecting a security setting from each of the drop-down menus, realize that all the choices above that selection are enabled for that security group.



E. Setting Archives and Rebuild

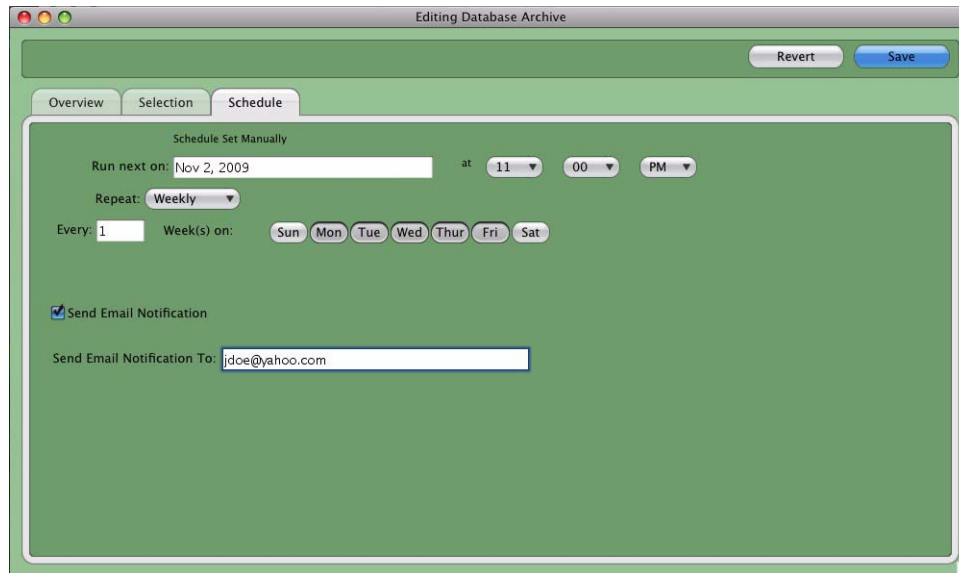
Setting an Archive Schedule

- Go to **Tools** on the menu bar and select **Utilities**.
- In the **Utilities** window, click on the **Database** tab and, then, click on the **Utilities** subtab.



- Click on **Database Archive**.

- Click on the **Schedule** tab.



- Enter the date for the next **Archive** to run in the **Run next on** field.
- Use the **Hour**, **Minute**, and **AM/PM** drop-down menus to set the time of day when you want the **Archive** to run. Set a time when Alexandria should not be in use (i.e. 11:00 PM).
- Use the **Repeat** drop-down menu to set the schedule frequency. We recommend running an **Archive** on each day you use Alexandria.
- In the **Repeat** drop-down menu, select **Weekly** and set the **Every** field to **1**.
- Click on the **Day** buttons for the appropriate days (i.e. Monday through Friday).
- If you would like to be notified by email when an **Archive** has been run, check the **Send Email Notification** box and enter your email address in the **Send Email Notification To** field. If multiple email addresses are entered, a comma and a space must separate them.
- Click **Save** to save the changes.

Setting a Rebuild Schedule

- Go to **Tools** on the menu bar and select **Utilities**.
- In the **Utilities** window, click on the **Database** tab and, then, on the **Utilities** subtab.
- Click on **Database Rebuild**.

- Click on the **Schedule** tab.

The screenshot shows a window titled "Editing Database Rebuild" with a "Schedule" tab selected. The "Schedule Set Manually" section includes the following fields and options:

- Run next on:** Nov 6, 2009
- at:** 11:10 PM
- Repeat:** Weekly
- Every:** 2
- Week(s) on:** Sun, Mon, Tue, Wed, Thur, Fri, Sat
- Send Email Notification**
- Perform Archive Before Running Operation**
- Restart after Rebuild**
- Send Email Notification To:** jdoe@yahoo.com

Buttons for "Revert" and "Save" are located at the top right of the window.

- Enter the date for the next **Rebuild** to run in the **Run next on** field.
- Use the **Hour**, **Minute**, and **AM/PM** drop-down menus to set the time of day when you want the **Rebuild** to run. Set a time when Alexandria should not be in use and after the scheduled **Archive** (i.e. 11:10 PM).
- Use the **Repeat** drop-down menu to set the schedule frequency. We recommend running an **Rebuild** on twice a month for stand-alone systems and weekly for Central Union and Alexandria Controller systems.
- In the **Repeat** drop-down menu, select **Weekly**, then, click on a **Day** of the week (Since a **Rebuild** can take several minutes to many hours depending upon the number of patrons, items, and transactions, this should be run at a time of day and day of the week when Alexandria is not being used (i.e. 11:10 PM on Friday if the library is closed on Saturday.)
- Set the **Every** field appropriately to 1 or 2.
- If you would like to be notified by email when a **Rebuild** has been run, check the **Send Email Notification** box and enter your email address in the **Send Email Notification To** field. If multiple email addresses are entered, a comma and a space must separate them.
- Click **Save** to save the changes.