

# The Alexandria Newsletter

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MONTHLY

DECEMBER 2007 • Issue #6

## FROM THE PRESIDENT'S DESK

Season's Greetings! At this time of year, it seems that our thoughts turn to family and friends and are filled with good wishes for them — health, wealth, happiness, etc. You are not just our customers, you are friends and part of the COM-Panion family. All of us at COM-Panion hope that your holiday season will be joyous and that the coming year be even better than this year.

See you in January!

—Bill Schjelderup  
President ∞



- Enter your discarded note reason (e.g. out-dated) in the **Starting With** and **Ending With** fields.
- Click on **Run**.

Vendors, Budgets, and Orders are interrelated and vendors and budgets must exist before an order can be created.

## BUDGETS MODULE

The **Budgets** module will track numerous budgets and the amounts committed from that budget, the funds spent, and keep a running balance for you. For instance, if ESEA funding may not be used for paperback items and only a certain percentage of the total amount allocated may be used for Audio Visual items, the **Notes** tab is perfect for recording that information. The **Budget List** report under **Orders Reports** summarizes your budget activity into one report.

## VENDORS MODULE

The **Vendors** module tracks your vendor information. Enter the company name, address and contact information for each of your vendors. You may enter notes on the **Notes** tab pertaining to the vendor to document instructions, claims, etc. One of the nicest features is the **Barcodes** tab because it provides a means of tracking barcode ranges assigned to vendors and the next barcode that you should expect to see from the vendor.

## ORDERS MODULE

Using Alexandria's **Orders** module, you may quickly order items and, if desired, automatically add received items into Alexandria. Simply go to the **Orders** module and start a new order. The vendor information will be entered for you when you select the vendor from the drop-down menu. Then, as you add items to the order, use the **Budget** drop-down menu to indicate the budget to be used for the purchase. Remember those items that you withdrew because they had been overly "loved" but that you want to reorder? Alexandria has made this so easy — just click on the **Order Existing Title** button, select the title and click **OK**. The information will be filled in for you. Print your order, claim letters to vendors — even letters notifying patrons who have requested items to let them know that the items have arrived and are ready to be checked out! ∞

## KAAREN'S CORNER

BY KAAREN LINTON  
LIBRARIAN/ALEXANDRIA TRAINER

### ORDERING AND ALEXANDRIA

The last issue focused on collection assessment and weeding. The next logical step in the process is ordering, and Alexandria provides excellent tools that simplify the ordering process. In addition to reports, Alexandria has modules for tracking budget expenditures, vendor information and generating orders.

### ORDERING REPLACEMENT ITEMS FOR OUTDATED MATERIALS

The **Discard Notes** entered when you discarded items will now play an integral part in the ordering process. A new report, **Reordering Details**, will provide author, title, ISBN, LCCN, publisher, publication year, call number, and price for items meeting the **Select By** criteria. This list contains the author, title and publication information as well as the call number. Generating a report for items that have the **Discard Note**, **Outdated**, makes it easier to know what subject areas for which to order more current replacement materials.

- Go to **Reports** on the menu bar and select **Item Reports**.
- Set **Report Name** to **Reordering Details** and **Select By** to **Discarded Note**.

## ALEXANDRIA ANSWERS

**CAN YOU SET ALEXANDRIA SO THAT THE PATRON AND/OR ITEM STAYS UNLOCKED WHEN YOU ARE EDITING NUMEROUS RECORDS, SO YOU WON'T HAVE TO UNLOCK EACH ONE INDIVIDUALLY?**

Yes, this is easily done using the **Miscellaneous** tab of **Default Local Display Settings** preferences. Simply remove the check from the **Database Management Windows Locked by Default** option.

A word of caution, remember to go back and recheck this option after you have finished making your changes. Having the management windows locked by default will prevent unintentional changes from being made.

**IS IT POSSIBLE TO PRINT A REPORT OF NEW ITEMS ADDED TO ALEXANDRIA?**

Yes. Select **Item Reports** from the **Reports** drop-down menu. Set the **Report Name** drop-down menu to **Copy List**, select the desired **Format** and **Sort By** options, then set the **Select By** drop-down menu to **Copy Accession Date** and indicate the date range using the **Starting With** and **Ending With** fields. Click on **Run**.

## COLLECTION CLEANUP CHALLENGES FOR DECEMBER

Last month, we gave you a few simple challenges to use **Authority Control** to clean up your Alexandria database. The challenge continues! We are starting with the “little” areas and will slowly move toward major areas such as **People** and **Subjects**. This month, we are going to look at your **Mediums** and **Grades**. You may discover that some weird mediums are present — perhaps a cataloger typed an **-h** instead of **\_b** and a subtitle has ended up in the **Medium** field. Maybe someone previously had entered 6th in **Grade** and you want to change it to 6. This is the fast and easy place to make that change.

**Challenge One:**

- Go to **Show** on the menu bar and select **Authority Control**.
- Change the drop-down menu in the upper-left corner of the window to **Medium**.

- Look at the mediums that are listed. Are there any strange ones?
- If there is an incorrect medium, double click on that medium and a window will open.
- Change it to what it should be, then, click on **OK**.
- Repeat this for every incorrect Medium.
- Click on **Save** in the upper-right corner of the **Authority Control** window. Alexandria will go through your item records and replace the incorrect mediums with the corrected ones.

**Challenge Two:**

- Go to **Show** on the menu bar and select **Authority Control**.
- Change the drop-down menu in the upper-left corner of the window to **Grade**.
- Look at the grades that are listed. (Central Union folks, just look at those associated with your school, and your district person should check to see if there are any in the list that are not valid for other schools). If your grades are there and correct, you are finished with this challenge. If not, continue.
- If there is an incorrect grade, double click on that code and a window will open.
- Change the grade to what it should be, then click on **OK**.
- Repeat this for every incorrect grade.
- Click on **Save** in the upper-right corner of the **Authority Control** window. Alexandria will go through your patron records and replace the incorrect grades with the corrected ones. ∞

