

# The Alexandria Newsletter

GROWTH • TIPS • PROMOS • ANNOUNCEMENTS • MORE

QUARTERLY

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## FROM THE PRESIDENT'S DESK

New faces and a new school year . . . We can certainly empathize with you this year. Alexandria has experienced a phenomenal increase in the number of users in the past few months.

Like you, we have many who are old friends we've known and served for years and we have numerous new users with whom we are getting acquainted.

COMPAnion employees, from Tech Support to Sales to Operations, are committed to providing you the best possible service. While most departments are open weekdays from 8 a.m. to 5 p.m. Mountain Time, remember that Tech Support is always there — 24 hours a day, 7 days a week, 365 days a year.

Sales.....1-800-347-6439

Tech Support.....1-800-347-4942

Thanks

Bill Schjelderup ∞



## Item Notes

The **Notes** tab of an item record gives you an opportunity to have both **Content Notes** and **General Notes**. If you have had vendors providing your MARC records, you may never have used these fields.

I remember two incidents from my days as a school librarian where using the **Content Notes** would have made a big difference for my patrons. The first incident happened when students said, "You don't have ANYTHING on Fremont Indians!" Well, I did, but they had to think to look in a book dealing with Utah history, and then use the index to find the pages on Fremont Indians. If I had had Alexandria, I could have added a note "Fremont Indians pp. 242-245" to the **Content Notes** for the item record and, when the students did a keyword search, the book title would have been listed. The second example was when I would try to locate a favorite short story, but could not remember the title of the book. If only the item record had had the short story titles listed in the **Content Notes** field, it would have been so much faster to find that illusive story! Just list the various short stories or titles in the **Content Notes** field with a <space> - - <space> between them and they will be searchable.

While the **Content Notes** field on the item record is an excellent place for listing the various pieces of a kit, you might find that the **Copy Notes** tab provides an even better place for this information. Yes, it could be entered in **Copy Notes**, but the **Alert Notes** field can be even more helpful. Information listed in the **Alert Notes** field is shown in a window in Alexandria **Circulation** that opens every time the item is checked out or checked in. Just think about the times a teacher has returned an item with a missing piece or pieces and has said, "it wasn't there when I checked it out." If you had an **Alert Note** listing the contents of the kit, you would be reminded to confirm that all the pieces were present upon check out. You would also be reminded to check for all the pieces when it was returned.

## KAAREN'S CORNER

BY KAAREN LINTON  
LIBRARIAN/ALEXANDRIA TRAINER


TAKE NOTE... ALL SORTS OF NOTES!

I'd like to extend a warm welcome to new Alexandria users and also a welcome back to those of you who are long-time Alexandria users. We understand that the start of each new school year is always a busy time for you, and suggest that you take a few minutes and visit our website and review last year's August 2007 newsletter ([http://www.goalexandria.com/newsletter\\_archive.html](http://www.goalexandria.com/newsletter_archive.html)) for the article on beginning of the year procedures. This is a helpful list of the things you will want to do at this time of year.


When I look at my computer, I realize how much I depend on notes (Post-it® notes & "stickies" on my desktop, etc.) to help me remember things. Alexandria has various notes features that can be very helpful in a similar manner, but are probably not used as effectively as they could be, so . . . take note!

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## KAAREN'S CORNER CONT'D.

**Copy Notes** are also a great place for damage notes — no more writing notes under the barcode to remind yourself of damages done to the item! Just type the **Append Copy Notes** command (++) and the note (i.e. ++ Water damage 3/08). The copy notes are easily accessed by clicking on the **Notes** icon  in the icon bar under the **Current Item** pane of the **Circulation** window. This will let you see if you have previously recorded damage to an item.

**Patron Notes**

The **Patron** record contains a **Notes** tab with room for several kinds of notes — **Contact Notes**, **Alert Notes**, **Categories** and **General Notes**. If notes have been added to a patron's record, the **Notes** icon  will be present in the icon bar right under the spot for the patron's picture. Just click on the icon and the **Notes** tab will open in a window on the Alexandria **Circulation** window.

**Contact Notes** are great for work or cell phone numbers for parents of your students or for messages like “Talk to Dad, not Mom” if talking to one or the other parent is more effective.

**Categories Notes** will enable you to identify special groups of patrons to help you better serve them. An example of this is the kindergartner who is reading on a third grade level when they start school. Having a note that says “Gifted and Talented” would provide information for you, your assistants or a substitute that this student does not need to be limited to Easy books.

**General Notes** may be used for a variety of things. Perhaps you have had an excellent student aide for one semester, and they want to be an aide for another semester in another year, but you will not be there. By putting the note “great library aide — highly recommended” on that student's record you will provide helpful information for your replacement.

**Alert Notes** help you to remember vital information since they open in a window on the Alexandria **Circulation** window every time the patron is the **Current Patron**. Perhaps a parent requests that their child only be allowed one book at a time or not be allowed to check out scary books. Whatever the reason or message, you'll see it and be given an auditory alert to remind you to look at the screen every time.

**Transaction Log Notes**

One of my favorite note features of Alexandria is the **Transaction Log Notes** command. I remember having to leave the library unattended because of a call to the office, then wondering whether anyone had been using my circulation system while I was gone. With Alexandria, I could have put a note in the log “Out to office” by typing the command ‘#’, the note, and then pressing the <enter> key (i.e. # Out to office). Then, if anything had been done, I would have seen it appear after the note in the Transaction Log. One librarian uses this feature to have her student aides check in since Alexandria will date and time stamp the note entry into the **Transaction Log**. When they “log in” this way it is easy to tell if the student aide arrived on time even when the librarian is busy elsewhere. Another use is to show who is at the desk during a particular time by having each person enter a note (# ‘name’ at Desk) when they switch duties.

I am sure there are many Alexandria users who have discovered the various notes features and have found special uses for them. If so, please share them with us, and we will pass them along as Tip of the Week hints and give you the credit! ∞

## COLLECTION CLEANUP CHALLENGE FOR THIS QUARTER

For anyone new to the newsletter, we have been cleaning up the Authority Control area for publishers using the **Authority Control** feature of Alexandria.

If you are a new Alexandria user, your indexes were built when your data was imported. Just follow the steps given below to set your **Authority Control preferences**, then start with the A's in Publisher Authority Control and do a little each day until you finish this Authority Control area. The Challenge Steps portion of this article will help you begin your clean-up. It may take several months, but that's okay since Authority Control is a never-ending work-in-progress.

CHALLENGE CONT'D ON NEXT PAGE

## CHALLENGE CONT'D.

- Go to **Edit** on the menu bar and select **Preferences**.
- Set the two drop-down menus in the upper-left corner of the preferences window to **Authority Control** and **Default Local**.
- For now, enable **School** and **Library** by checking those boxes.
- Click on the **Automatically Update Authority Controlled Information** and then click on **Save**.

For those who have been doing the Collection Cleanup challenges, this quarter, we continue to clean up publishers working with those from R through Z. Do what you can, even a few each day will make a difference!

This should finish cleaning up the publishers, but, if you can't resist working ahead, find another area to work in and go for it.

Challenge Steps:

- 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 **Publisher**.
- Look at the publishers that are listed. Do you see variations of the same publisher (e.g. A.A. Knopf, A. A. Knopf, Alfred A. Knopf, Inc., Alfred Knopf)?
- If so, decide on the one that you want to use, and then double click on one that you wish to change, and a window will open.
- Change it to what it should be, then click on **OK**.
- Repeat this for every incorrect **Publisher**. Remember, deleting the entry here only deletes it from the index and not from the records. Changing it will change it on the records when you click on **Save**.

Click on **Save** in the upper-right corner of the Authority Control window. Alexandria will go through your item records and replace the incorrect publishers with the corrected ones.∞

## PRODUCT ANNOUNCEMENTS

We appreciate your continued support of COMPanion Corporation and of Alexandria. This year COMPanion Corporation is celebrating 22 years of service and we look forward to serving you well in the many years to come.

As an added benefit to our customers, we will be sending out monthly e-mail announcements to ensure you are notified of the exciting options available with Alexandria, which will help increase the value of your libraries. This month, we have chosen to highlight the wonderful capabilities included in the "A" License bundle.

Why move from the "M" License to an "A" License?

The "A" License includes:

- **Enhanced Web Capabilities** for librarians and patrons: with Web Librarian, accomplish key librarian tasks such as circulation, cataloging, and reporting by using a normal web browser. Patrons can easily search your library collection from any computer with internet access, including their home computer during non-library hours.
- **MARC Search** allows you to find, choose, and easily download MARC records seamlessly into Alexandria without ever leaving your program!
- **WAN (Wide Area Network)** allows libraries within a district to search each other's collections while maintaining autonomy.
- **Cross Platform** functionality allows Alexandria to work natively in a PC, Macintosh, or mixed computer environment.
- **Explore** is a fully customizable, icon-based search interface for more visual learners to use when searching your catalog. This option also allows you to create reading lists, highlight awards lists, launch applications, and even open websites and documents with the click of a button.
- **Z39.50** helps your patrons easily search other library collections, such as public and college libraries, using the familiar Alexandria interface.

For additional information regarding the "A" License or questions regarding enhancements to your Alexandria program, please do not hesitate to contact our sales team at (800) 347-6439 or [sales@companioncorp.com](mailto:sales@companioncorp.com). ∞

## ALEXANDRIA ANSWERS

ADVANCING PATRON GRADES

With the use of Alexandria's **Patron Grade Table**, advancing your patrons is an easy process! You can locate the Patron Grade Table by going to the following:

Edit > Preferences > Patron Management > Global > Grade tab

Here you can change, add, or remove grade codes and their descriptions. To advance all patrons grade levels, change the **Last Day of School** setting from the last day of school this year to the last day of school next year. For example, if the 2008 school year were ending, you would update the date to the last day of school in 2009.

If this does not automatically upgrade your patron grades, you have the option of clicking the **Advance Grades** button which will promote all patrons one grade level. Please note that after clicking this button, you can not reverse the advancement, so be sure to only click this once. It is a good idea to have a backup or archive of your database before advancing patron grades in case you wish to revert back to previous data.

IMPORTING PATRON RECORDS

**Importing** is the process of moving information into Alexandria from outside sources. Typically, this is a quick and easy method to getting information into Alexandria, rather than entering it manually.

Using Alexandria's import function, you can move patron information from other computer applications directly into Alexandria. For example, you might be able to get patron information from the administrative office student database and import it into Alexandria. Alexandria can import patron information files in tab-delimited format. Most word-processing and spreadsheet applications support files in tab-delimited format.

**Tab-Delimited Records:**

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
Bill <tab> Jones <return>
My First Name <tab> My Last Name <return>
```

Using tab-delimited patron import files, you can transfer information about patrons stored in other computer systems. For example, a school can use this capability to transfer student information from the school administration computer system into Alexandria (or transfer library information back to the administration system).

**Matching Imported Patron Information:**

During import, Alexandria attempts to locate an existing record that matches the newly imported record. If an existing Alexandria record is located (and **Allow Patron Updates** is selected), the existing record is updated with the imported information. If **Allow Patron Updates** is unchecked, the matching import records are ignored. If no records in the system match, a new record is added.

In looking for matching records, Alexandria first checks the patron barcode, then the community ID (Student #), and government ID (SSN #). If no matches exist, the import record is considered a new record. New records are assigned barcodes and policies based on the preferences you've entered in the **Import** window. ∞

## COMPANION TRADESHOW SCHEDULE

TRADESHOW	CONFERENCE NAME	START DATE	END DATE	LOCATION
OCIC	OCIC Encyclo-Media	09/17/08	09/19/08	Oklahoma City, OK
FAME	Florida Association for Media in Education	09/24/08	09/26/08	Kissimmee, FL
WyLA	Wyoming Library Association	10/01/08	10/03/08	Casper, WY
MoLA	Missouri Library Association	10/01/08	10/03/08	St. Louis, MO
MEMO	Minnesota Educational Media Organization	10/02/08	10/02/08	Minneapolis, MN
WLMA/OEMA	Washington Library and Media Association	10/09/08	10/11/08	Portland, OR
IaLA	Iowa Library Association	10/15/08	10/16/08	Dubuque, IA
NLA/NEMA	Nebraska Library Association	10/15/08	10/17/08	Lincoln, NE
NELA	New England Library Association	10/19/08	10/21/08	Manchester, NH
T+L	Technology + Learning	10/28/08	10/30/08	Seattle, WA
NCSLMA	North Carolina School Library Media Assoc.	10/29/08	10/31/08	Winston-Salem, NC
WiLA	Wisconsin Library Association	11/04/08	11/07/08	Middleton, WI
MAME	Michigan Association for Media in Education	11/05/08	11/07/08	Dearborn, MI
SC Tech Ed	South Carolina TechEd	11/05/08	11/07/08	Myrtle Beach, SC
Vt. Fest	Vermont Fest or VITA Learn	11/05/08	11/07/08	Killington, VT
Ga ETC	Georgia Educational Technology Conf.	11/05/08	11/07/08	College Park, GA
VEMA	Virginia Association for Media in Education	11/05/08	11/08/08	Richmond, VA
ISLMA	Illinois School Library Media Association	11/06/08	11/08/08	Arlington Heights, IL
CoAL/CAL	Colorado Association of Libraries	11/06/08	11/08/08	Denver, CO
NJASL	New Jersey Assoc. of School Librarians	11/13/08	11/15/08	East Brunswick, NJ
MassCUE	Massachusetts Computer Using Educators	11/19/08	11/20/08	Sturbridge, MA
TASL	Tennessee Association of School Librarians	11/20/08	11/22/08	Franklin, TN
CSLA	California School Library Association	11/20/08	11/22/08	Sacramento, CA
NYSCATE	New York State Assoc. for Computers	11/23/08	11/25/08	Rochester, NY
C. McAuliffe	Christa McAuliffe	12/02/08	12/04/08	Nashua, NH
TIES	TIES Education Technology Conference	12/06/08	12/09/08	Minneapolis, MN
AzLA	Arizona Library Association	12/08/08	12/10/08	Glendale, AZ
TETC	Tennessee Educational Technology Conference	12/10/08	12/12/08	Nashville, TN

