

Alexandria[®]

VERSION 7

SELF-HOSTED GUIDE FOR ADMINS



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Please carefully read this Getting Started Guide before setup or use of the Alexandria system. If you still have questions after reading these instructions, please contact Customer Support at support@companioncorp.com or call (800)-347-4942.

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This guide contains information on installing Alexandria and maintaining the software with backups and updates if you self-host. Usually only Admins and IT staff will need to know how to do this. For information on customizing and using Alexandria for both self-hosting and cloud-hosting, check out our [Getting Started Guide for Librarians](#).

WELCOME TO ALEXANDRIA

Alexandria has been automating public, school, and church libraries around the world for nearly 30 years. Welcome to our family of happy users!

Alexandria is a comprehensive library automation software system designed to efficiently manage your assets, textbooks, electronic resources, and patron information—freeing librarians and technology specialists to deal with more important tasks.

Alexandria interfaces are cross-platform and accessible on both Macintosh and Windows operating systems via HTML-5 compliant web browsers—or mobile devices, laptops, and tablets such as Apple's iPad, Google's Chromebook, and others.



The **Alexandria Librarian** interface is where you check items in and out, run reports, perform utilities, access administrative tools, and change your preferences and policies.



Textbook Tracker allows you to easily manage textbook circulation and can be used independently or in conjunction with Alexandria Librarian.



Alexandria Researcher empowers your patrons with a suite of visually engaging search interfaces used to discover and access your resources.



Throughout this guide, you'll see keycodes like this **RH**. They're handy shortcuts you can search in the Support Center to find more information on various topics. See the [Keycode Directory](#) for a full list.

Cloud Hosting Benefits

When Alexandria is cloud-hosted, you save time and resources. From our advanced data centers, we perform daily archives and backups of your data as well as handle all updates and upgrades.

Database Administration and Support

- Setup is included. There's no software installation or necessary maintenance.
- Our specialized staff have the tools to monitor performance, connection, and stability 24/7.

Dedicated Connection

- An internet connection gives you access to Alexandria anywhere in the world.
- We provide the DNS name for your library (e.g. yourlibrary.goalexandria.com).
- Communications between you and our servers are safe and secure.
- There are no special ports or firewall configurations. Third-party connections are hassle-free.
- We provide battery-backup and generator-protected power.

No Need to Purchase Hardware

- We install your data station and host your library database in our data center.
- Hosted servers use state-of-the-art hardware for optimal performance and reliability.

INSTALLING ALEXANDRIA

You will be installing Alexandria on the machine you've designated as your data station (i.e. server). Ideally, this is a dedicated machine isolated from the public and only accessible for infrequent operator maintenance.

Please read through our most current Alexandria [hardware and operating system recommendations](#). These can also be found by searching keycode  in the [Support Center](#).

COMPanion will email you with instructions and a link to download the **Alexandria app** and **Alexandria Support** files. If you can't locate this email, check your spam, junk, or deleted items folders as your confirmation email may have been accidentally placed there.



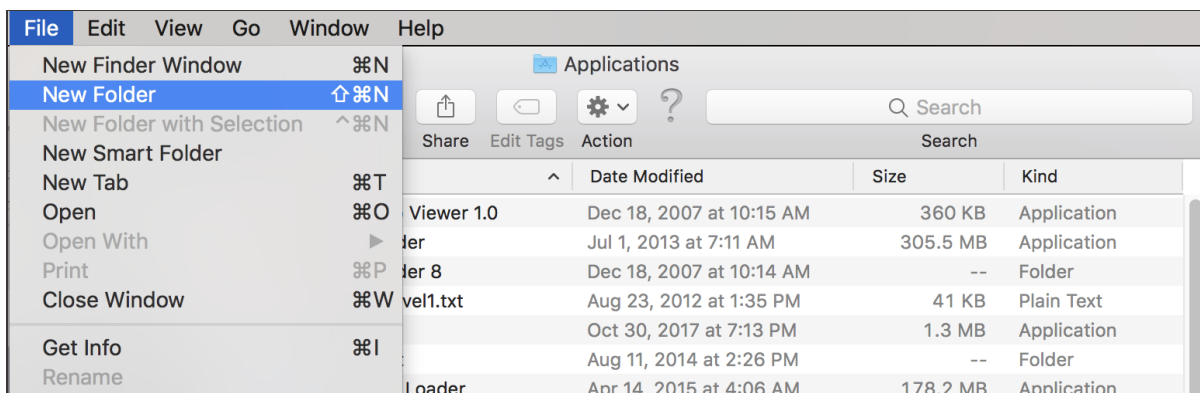
The **Alexandria Support** folder contains a Data folder where your core data (database, operation files, and logs) will be stored. In an Alexandria Controller, the Data folder will contain a separate folder for each data station serial number. The configuration file, which is required for Alexandria to operate, is also located in the Alexandria Support folder. In an Alexandria Controller, a separate configuration file is stored in each data station folder.

Installing on macOS

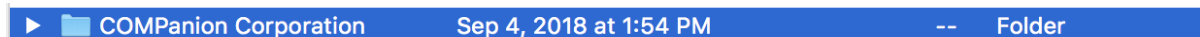


Do NOT run Alexandria on macOS Catalina 10.15+ or on a virtual machine.

1. Download **Alexandria.app** and **Alexandria Support** from the provided FTP site.
2. Go to **Applications**.
3. Create a new folder by going to **File > New Folder**.



4. Name the new folder **COMPanion Corporation**.

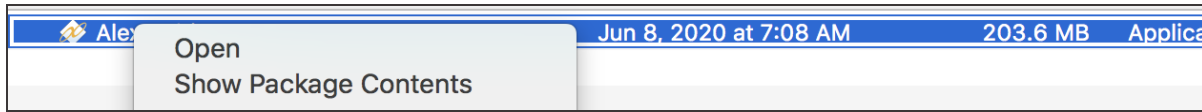


5. Place **Alexandria.app** into the **COMPanion Corporation** folder.

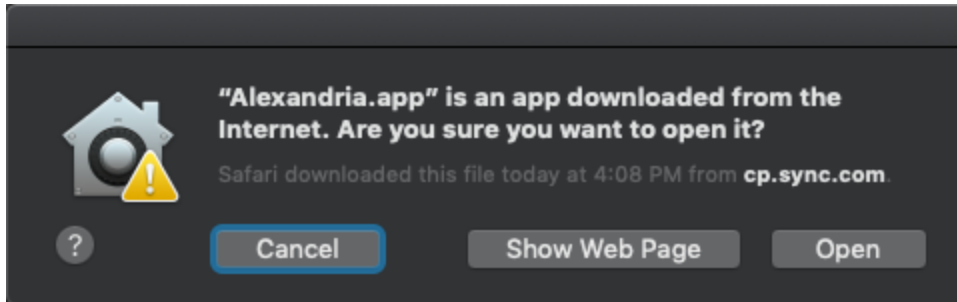
COMPanion Corporation	Today at 10:49 AM	--	Folder
Alexandria	Jun 8, 2020 at 7:08 AM	203.6 MB	Application

6. Right click or Ctrl + click on **Alexandria**.

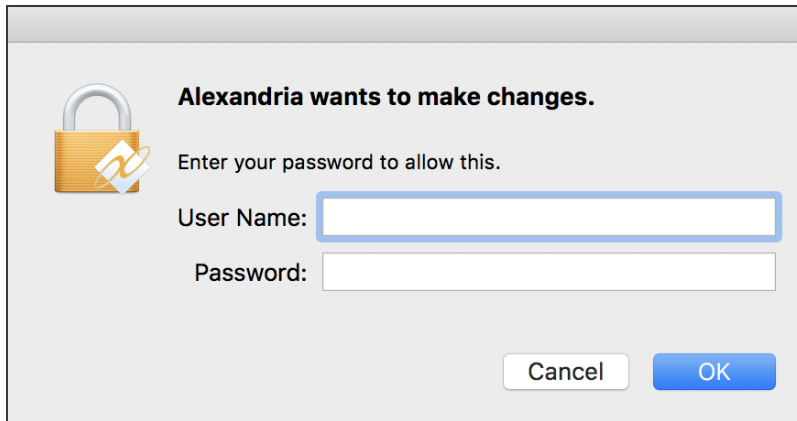
7. Click on **Open**.



8. If you downloaded Alexandria from the internet by an HTTP or FTP site, you may be asked if you're sure you want to open it. Click **Open**.



9. You may also be prompted to enter an administrator username and password.



10. Go to the hard drive (**MacHD**) > **Users** > **Shared** > **Application Support**.

11. Within **Application Support**, replace the **Alexandria Support** that's already there with the **Alexandria Support** from the FTP site.

12. Once replaced, go back to **Applications**.

13. Click on **COMPanion Corporation**. Double click on **Alexandria**.

14. When the program starts, it will automatically open a web browser page to your Alexandria web services. It is important to wait for this to happen and to not try starting the program again. You can verify Alexandria is running in your Task Manager. Once the program starts web services, an

Alexandria login page will open. If you're brand new, you'll want to create a District Administrator account to start. However, if you're coming from a previous version of Alexandria, you can log in with your old account.

And that's it! You've installed Alexandria! If you're a single-site license, you are finished installing. If you're part of a Centralized Catalog, be sure to set up your additional sites **ST** now.



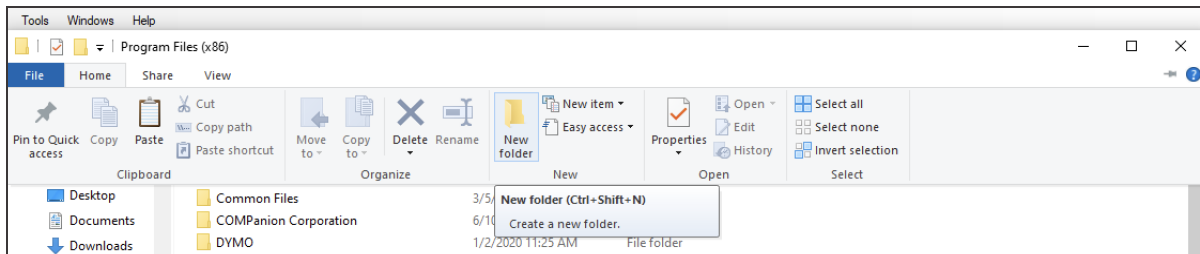
If you are running an Alexandria Controller, you need to be aware of some additional details. Read about them in our [Support Center](#) using keycode **CT**.

Installing on Windows

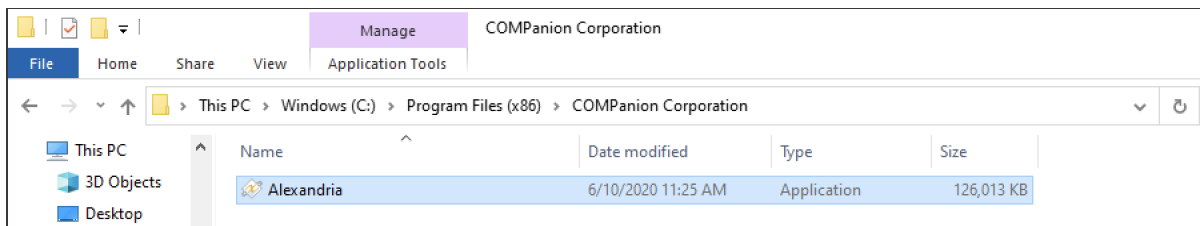


Virtual machine (VM) environments are not recommended or supported. We recommend Alexandria run on its own server machine with an assigned static IP address for best performance.

1. Download Alexandria and Alexandria Support from the provided FTP site.
2. Go to your **C: drive**.
3. Create a new folder and name it **COMPanion Corporation**.

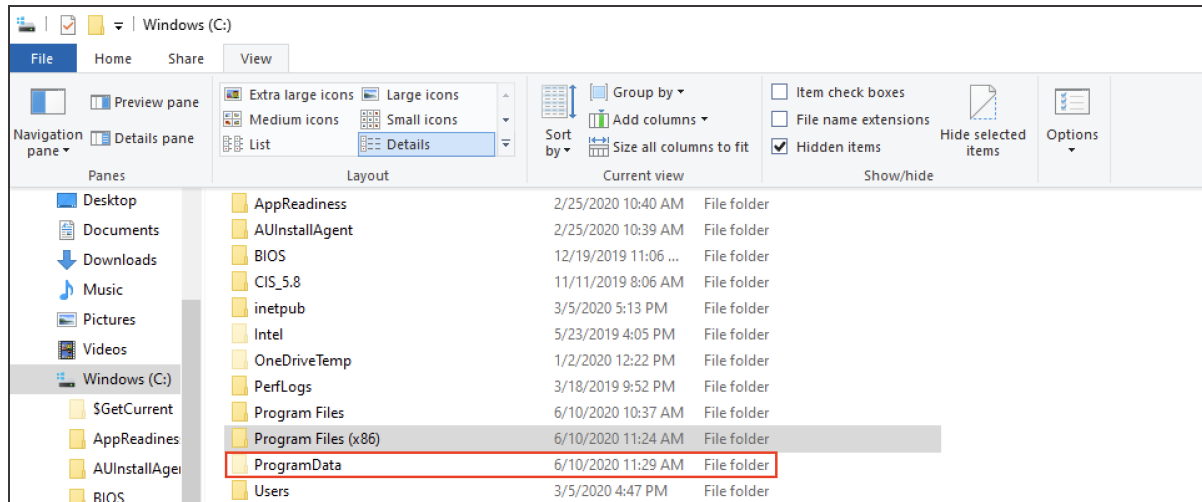


4. Place **Alexandria** into the **COMPanion Corporation** folder.



5. Right click and select to **Run as Administrator**.
6. Go to **C: drive**.

7. Go to **ProgramData**. If **ProgramData** is NOT displayed then you will need to click on **View** and show the **Hidden Items**.



8. Within **Program Data**, replace the existing **Alexandria Support** with the one from the FTP site.
9. Double click on **Alexandria** in the **COMPanion Corporation** folder.
10. When the program starts, it will automatically open a web browser page to your Alexandria web services. It is important to wait for this to happen and to not try starting the program again. You can verify Alexandria is running in your Task Manager. Once the program starts web services, an Alexandria login page will open. If you're brand new, you'll want to create a District Administrator account to start. However, if you're coming from a previous version of Alexandria, you can log in with your old account.

And that's it! You've installed Alexandria! If you're a single-site license, you are finished installing. If you're part of a Centralized Catalog, be sure to set up your additional sites **ST** now.




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Client/Server Communications—Addresses, Ports, Protocols

Accessing Alexandria's standard and expanded services requires that you configure your firewall to allow certain ports and addresses. Alexandria web clients communicate with the data station using TCP/IP protocols, typically over web port 80. Therefore, the Alexandria data station needs to have a fixed TCP/IP address.

Title Assistant and **Z39.50** queries (i.e. MARC record queries) typically use Port 210, Port 2200, and Port 7090 (Library of Congress). Your data station(s) will need these ports open.

The Alexandria data station is updated via the cloud. If you filter or limit your network traffic, please allow access to s3.amazonaws.com and s3.amazonaws.com for outbound communications in order for registration and other services to function properly.

A comprehensive list of addresses you should allow in your firewall's access control list can be found by searching keycode  in the [Support Center](#).

Information and Technology Services Quick Reference Guide

Here are the IPs you need to whitelist on your firewall.

NAME	PRIMARY	SECONDARY
IP Ranges	209.210.70.0/24	65.127.73.24/29

Below is a comprehensive list of addresses you should allow in your firewall's access control list.

NAME	PORTS	IP ADDRESS	URL/WEB ADDRESS
Alexandria Web Services	80 (Non-Secure) 443 (Secure)		
COMPanion Core Services	80		s3.amazonaws.com, s3amazonaws.com
COMPanion FTP Support	21	209.210.70.4	ftp.companioncorp.com
COMPanion Cover Art			aws.amazon.com, images.amazon.com
Google Analytics	80		google-analytics.com
Title Assistant & Z39.50	210/2200/7090		
Alexandria Support Center	80	209.210.70.4	www.goalexandria.com/v7Docs/index.php
COMPanion Support Email	25		mail.companioncorp.com
COMPanion Update Server			s3.amazonaws.com, s3amazonaws.com

Administration Settings ^{AD}

Use the **Administration** interface to automate archives and configure web and email settings. This is also where you update Alexandria to the latest version. These settings should be configured before any preferences are set or circulation services performed.

Please note that these are advanced, high-level settings used to configure the data station (i.e. server). They are intended for network administrators, information technology support departments, or operators who have been assigned the task of overseeing your system.

To access the **Administration** settings, append “/admin” to the end of your data station or IT Controller’s domain name.



An operator’s access to these settings is governed by the **Data Station Management** dropdown menu found in **Preferences > Security > Management**. By default, only operators with Administrator-level security are allowed to make changes to these settings.

See page 11 to learn how to update Alexandria from the **Administration** interface.

Search the [Support Center](#) for more information on Controller technology ^{CT}.

DATA STATION ADMINISTRATION SETTINGS CHECKLIST



EMAIL ^{EM}

The **Email** settings are used to configure how Alexandria communicates with your library’s email server. These need to be set up if you want to send letters and notices from within Alexandria.



DATABASE ^{DB}

The **Database** settings allow you to specify how many archives to keep and where they will be stored. Alexandria performs Database Maintenance automatically to keep your data in tip-top shape.



WEB ^{WB}

The **Web** settings relate to general library connectivity and allow you to configure the SSL (Secure Sockets Layer) certificates, ports, and server domain name that Alexandria uses to communicate with **Librarian** and **Researcher** web clients.

BACKUPS AND UPDATES

1 Backups ^{BU}

Files in your database change every time you use Alexandria, whether you update an item or patron record, perform a transaction, or run a utility. For that reason, we highly recommend performing daily, secure backups of your Alexandria data in case something goes wrong.

With an adequate backup procedure in place, only small amounts of information will ever be lost, even after the worst conceivable failure.

We consider a backup to be a duplicate copy of your entire Alexandria database saved to an external source, at an external location, on regular intervals.

Develop a Secure Cloud Backup Strategy

If you don't already have a backup strategy in place, start one today. Your choice of backup strategy depends on your budget, the amount of data you need to backup, and your library or district's policies and procedures.

Cloud storage backup is simply the most reliable, cost-effective, and efficient solution—especially if you have large amounts of data. With cloud storage, you can set backup procedures to run at predetermined dates and times without operator interaction. Currently most cloud storage services allow you to upload several gigabytes of data for free when you create an account and offer other paid alternatives at reasonable prices. Whatever you put into your cloud folder is automatically saved to remote servers and can be recovered quickly in case of disaster. Additionally, most cloud storage systems (such as CrashPlan) offer professional, on-premises backup solutions.

Regardless of what you use, test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this before you have a problem so you'll know that you can recover data in an emergency.

What and When to Backup

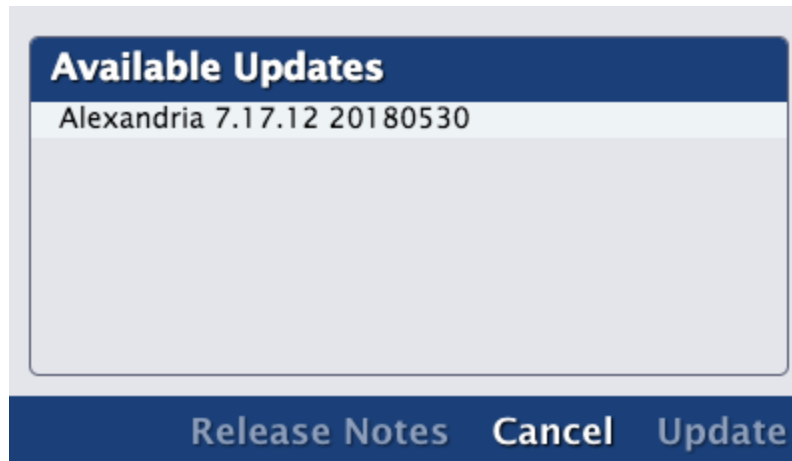
All pertinent Alexandria information—patron, item, report, and system preference information—is copied to your data station's Archive folder. This makes it easy to backup your data regularly.

Your backup procedure should include copying the Archive folder entirely at the end of each day. This way, you'll be able to quickly recover data on a daily basis if needed.


Archive and make additional backups of your Data folder before and after any major changes to your system. For example, you should archive and backup your data before and after you perform inventory and use utilities to update your records at the end of the year.

2 Updating Alexandria

With a valid software subscription, updates and next-generation versions are provided at no additional cost. You stay current with the latest technologies and never have to repurchase Alexandria—ever!



Here's how to perform an Alexandria software update:

1. Go to **/admin > Actions  > Check for Updates**. If an Alexandria update is available, the information is shown in the Release Notes section.
2. From there, you can choose to download and update your data station or postpone until a future date.



Remember to always perform a backup  before updating to a newer version of Alexandria!

ADDITIONAL SUPPORT

Contact COMPanion's Sales or Customer Support departments via phone or email to learn more about Alexandria features. Our skilled and knowledgeable staff will be able to answer any technical or software-related questions you may have.

Contact Sales

Phone

Toll free: (800) 347-6439

Worldwide: 1 (801) 943-7277

Email

sales@companioncorp.com

Contact Customer Support

Phone

Toll free: (800) 347-4942

Worldwide: 1 (801) 943-7277

Email

support@companioncorp.com

Online Resources

Support Center

[Explore Alexandria](#)

[Tip of the Week](#)

[Keycode Directory](#)

[Textbook Tracker Support Center](#)

Training and Videos

[Getting Started Resources](#)

[Alexandria Training Videos](#)

[Welcome to Alexandria](#)

Add-ons and Extras

[Partner Files](#)

[Add-on Support](#)



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