

Patrons Workshop



This page has been moved over to <https://support.goalexandria.com/patrons/patrons-workshop/>

20 February 2019

Frequently Asked Questions

Yes, if a barcode is not included within the import file, Alexandria will automatically assign a barcode to those patrons.

You can! First, navigate to **Tools > Preferences > Patrons > Patron Defaults** tab. In the **Barcode Settings** section, specify the beginning number for auto-assigned barcodes – choose a number that doesn't conflict with your item barcodes and has enough room to continue sequentially for all future patrons. Learn more in [Patron Defaults](#).

An admin account is simply a patron account with a different security group set (like District Administrator). New librarians should set their [security group](#) accordingly, usually as high as they are allowed to select.

Usually, this means the file is larger than 50mb. You need to separate the file into smaller sizes in order to import them.

This is generally used when importing patrons with SIF. Entering a date will not automatically advance the Patron Grades. Learn more about [Grade Table preferences](#).

To forgive a charge for an individual patron, use Circulation.

1. Make the patron current and go to the Charges tab.
2. Select the charge (or by holding <shift> or <command> you can select more than one).
3. Click Make Payment. (Or Forgive Charge.)
4. Click the box to *Forgive remaining balance*, and click Process.

To forgive charges in batches, use the Forgive Charges utility.

1. Go to Operations > Utilities > Patrons > Forgive Charges.
2. Use the Selections tab to choose who you are forgiving the charges for.
3. Use the Options tab for what type of charges to forgive, or in a specific date range.
4. Click Run.

How do you want notice to be sent? If you'd like the program to do most of the work for you, try Automatic Email Notifications. Go to **Preferences > Circulation**. In the **Circulation Settings** tab, click the *Enable automatic email notifications* checkbox. This feature automatically sends email notices to the patron's email address for in-stock holds, overdue fees, and a number of other things. Read more about it in [Circulation Settings](#).

For those of you who want greater control over your notices – such as when they go out and to whom – use scheduled notice reports. For example, you could set up an [Overdue Items and Unpaid Charges Notice](#) report for each grade or homeroom and schedule it to email the teacher every month so they can help remind students.

1. Go to **Operations > Reports**, and choose the **Circulation** category and **Notices** subcategory.
2. Test out a few of the reports to see which ones work best for your situation. When you've found one, click **Create Saved Report** at the bottom right.
3. Next, go to the Saved tab, select the report, and unlock it for editing.
4. Build your report in the Selections and Options tabs.
4. In the Schedule tab, schedule the report to run at a specific frequency and time.
5. In the Notification tab, enable email notifications and specify to whom the notices will be sent. Separate email addresses with a comma.

And if you find it meets your needs, you can even use both methods at the same time!

To find your license and system information, go to your Circulation page, then select **Special**. In its sub-tabs you will find information like the Status Info, System Info, and License Info, which includes your Patron Count and details about your license.

In the Makeover, go to the **help** menu in the topnav and click **About Alexandria**. This will show you your patron/item count and how many you have left in your license.

1. First, make sure the file is tab-delimited (not a csv file).
2. Make sure you have a way to match the patron information with the info in the file, such as barcode, RSN (Record Sequence Number), GUID (Globally Unique Identifier), Government ID (SSN), Community ID (Student #), or Primary Email, First Name, and Last Name (all 3).
3. See [Patron Imports Best Practices](#) for more information.

Each level has the access of all the groups below them, but does not have access to any security groups on the same level or above them. See [Security Preferences](#) for additional information.

Once there are no patrons listed in a homeroom anymore, the homeroom is removed. So, updating the homerooms manually, via import, or through [authority control](#) will remove any homerooms with no patrons. Contact Support for additional assistance.

Go to Imports and select Images > Choose File. Choose a ZIP file containing the images to be imported. If the file is larger than 50 MB, schedule an FTP import in the Saved tab. For best results, images should be approximately 186 x 240 pixels in size and either .jpg or .png format.