Patrons General Utilities

Operations

Utilities

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Unknown macro: 'rate'

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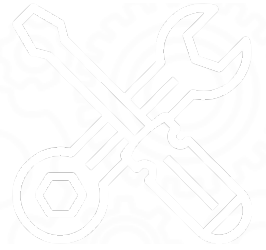
- Add Patron Notes
- Advance Patron Grade
- Change Patron Grade
- Change Patron 2nd Location
- Change Patron Location
- Change Patron Policy

- Change Patron Security Group
- Change Patron Status
- Forgive Charges
- Move Patrons to Site (CC only)
- Reassign Union Site Patrons
- Remove Patron History

- Remove Patron Notes
- Remove Patron Pictures
- Remove Patrons
- Renew Patron Accounts
- Reset Patron Accounts

Add Patron Notes

Adds or appends a Contact, General, Alert, or Category note to selected patrons

Use(s)

- If a group of specific patrons need to meet with the librarian, select **Alert Note** and type "Needs to meet with librarian" on the Options tab before running this utility. Alert Notes pop up in Circulation whenever those patrons' barcodes are scanned.

- If a group of specific patrons are in special reading programs, considered at-risk, or belong to other groups that need to be recorded, select **Category Note** and type the desired note on the Options tab.

Patrons General Utilities

Selections

Selections	Options

Add the note specified under the Options tab for:

Patrons at Site	AMS – Adams Middle School
Patrons with a Status of	Active
Patrons in Security Group	Patron (5)
Patrons with a Policy of	Any Policy
Patrons from	Location, From, Through
Patrons in Grade	From, Through
Patrons added	From MM/DD/YYYY, Through MM/DD/YYYY
Patrons with Last Name	
Patrons in Barcode Range	From, Through
Patrons with Barcodes	

☑ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections	Options

Add Note: [ ]

Note Type:
○ Contact Note
◉ General Note
○ Alert Note
○ Category Note

☐ Replace Existing Notes

Add Note: Type the note you would like to add. 500 charac...

Note Type: Choose the type of note to add.

Replace Existing Notes: When checked, this option remov... chosen type and completely replaces them with what's in th...

Advance Patron Grade

Moves specified patrons to the next grade (i.e. level)

⚠️ "Grade" is a localization term that can be altered in Terminology Preferences.

You can customize your grades (i.e. levels) in the **Grade Table** in **Patron Preferences**.

If you name your policies after grades, then you'll need to update those policies after running this utility. This has to be changed on a policy-by-policy basis using the *Change Patron Policy* utility.

Use(s)

Run this utility if you need to be specific about what types of patrons need to be moved to the next grade level. If you would like to advance *all* patron grades at the same time, use the *Advance All Grades* utility on the **Grade Table** tab of **Patron Preferences**.

✅ Read the Manual Entry section of our Patron Imports Best Practices for more information.

Selections

Selections

Advance patrons to the next Grade defined in the site grade table preference. Advance:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility   Run**

Change Patron Grade

Change Patron Grade

Textbook Tracker

Changes the grade (i.e. level) of selected patrons to the specified grade

⚠ "Grade" is a localization term that can be altered in Terminology Preferences.

Use(s)

Run this utility if patrons were accidentally imported or added with the wrong grade and the correct grade needs to be added.

Selections

	Selections	**Options**

Change the Grade to the value specified under the Options tab for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections	**Options**

Change Grade to _____

Change Grade to: Specify the new grade you would like se

<div align="center">Back to Top</div>

Change Patron 2nd Location
Change Patron 2nd Location

Textbook Tracker

Changes or adds a specified 2nd location for selected patrons

⚠ "2nd Location" is a localization term that can be altered in Terminology Preferences.

✅ You can also use Authority Control to edit, combine, or remove individual 2nd locations.

Selections

Change the 2nd Location to the value specified under the Options tab for:

Patrons at Site	AMS – Adams Middle School
Patrons with a Status of	Active
Patrons in Security Group	Patron (5)
Patrons with a Policy of	Any Policy
Patrons from	Location From Through
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY Through MM/DD/YYYY
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility   Run**

Options

Selections | **Options**

Change 2nd Location to   [   ]

Change 2nd Location to: Specify the new 2nd location yo...
to have. If this field is left blank, the utility will remove the c...

Change Patron Location

Change Patron Location

 Textbook Tracker

Changes the location of selected patrons to the specified location

⚠ "Location" is a localization term that can be altered in **Terminology Preferences**.

✔ You can also use Authority Control to edit, combine, or remove individual locations.

Use(s)

- Run this utility to set patron homerooms based on grade. In the **Patrons in Grade** selection, enter the grade(s) you want to assign a specific homeroom.

- Use this utility to merge patron homerooms at the end of the school year. This may make it easier to assign new homerooms at the beginning of the year.

Selections **Options**

This utility will change the Location to the value specified under the options tab.

Change Location for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Selections **Options**

Change Location to

Change Location to: Specify the new location you would li

Back to Top

Change Patron Policy

Change Patron Policy

🟦 **Textbook Tracker**

Changes the policy of selected patrons to the specified policy

⚠️ Newly changed patron policies will not affect the loan periods or fines for currently checked out items. To adjust these based on the newly changed policies, run the *Recompute Due Dates* utility after this utility.

Use(s)

If you base policies off of grades, run this utility at the end or beginning of a school year to update patron policies after advancing patron grades. Use the **Patrons in Grade** selection to specify the grade(s) to which you want to assign a particular policy.

✅ Check out our Beginning-of-Year Procedures and End-of-Year Procedures for more tips on preparing your library for summer or the new school year.

Change Patron Security Group

Change Patron Security Group

Textbook Tracker

Changes the security group of selected patrons to the specified security group

> ✅ Security Level controls which security groups a user can modify. For example, patrons assigned a security group with Security Level 2 can only modify groups with a Security Level of 3 or lower (3, 4, 5). However, this rule does not apply to District Administrators (Level 0).

Use(s)

Run this utility if you assign security group by grade. In the **Patrons in Grade** selection, enter the grade(s) you want to assign a specific homeroom.

Selections

Selections | Options

Change the security group to the value specified under the Options tab for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections | Options

New Security Group   Patron (5) ▼

New Security Group: Specify the new security group you will be in.

Change Patron Status

Change Patron Status

Textbook Tracker

Changes the status of selected patrons to the specified status

How does each status affect patron permissions?

Unknown macro: 'multiexcerpt-include-macro'

Use(s)

- Run this utility if you need to give a group of patrons who previously had an **Inactive** or **Suspended** status an **Active** status again.

- Run this utility at the end of the school year to give all patrons an **Inactive** status, which will prevent them from placing holds, making reservations, and more over the summer. Then at the beginning of the school year, use this utility to restore everyone's **Active** status.

Selections

Selections | **Options**

Change the patron status to the value specified under the Options tab for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ [From 🔍] [Through 🔍]
Patrons in Grade	[From] [Through]
Patrons added	[From MM/DD/YYYY 📅] [Through MM/DD/YYYY 📅] ▼
Patrons with Last Name	[ ]
Patrons in Barcode Range	[From] [Through]
Patrons with Barcodes	[ ]

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections | **Options**

Change Status to   Active ▼

Change Status to: Specify the new status you would like s

Forgive Charges

Forgive Charges

Textbook Tracker

Forgives selected charges, fees, or fines created during the specified transaction date range

What's included in each charge category?

1. **All Charges, Fees, and Fines:** Everything
2. **Lost Fees Only:** Charge record with a transaction note or description of "Lost"
3. **Overdue Fines Only:** Charge record with a transaction note or description of "Overdue Fine" or a currently accumulating fine
4. **Other Charges/Fees:** Everything *except* items in 2 and 3

Use(s)

- Run this utility to remove accidental charges, fees, and/or fines. This may occur when there are snow days or school breaks.

- If you declare all overdue items at the end of the school year as lost but only want to charge the lost item fee (not overdue fines), run this utility with the **Overdue Fines Only** option selected.

- If you only want to forgive minimal charges—such as those under $1—use the **Patron Balance** selection to indicate that range.

Selections

Selections	**Options**

This utility will forgive fines or charges as set under the options tab. Forgive charges for:

Patrons at Site   AMS – Adams Middle School ▼

Patrons with a Status of   Active ▼

Patrons in Security Group   Patron (5) ▼

Patrons with a Policy of   Any Policy ▼

Patrons from   Location ▼   From 🔍   Through 🔍

Patrons in Grade   From   Through

Patrons added   From MM/DD/YYYY   Through MM/DD/YYYY ▼

Patron Balance   .01   99999.00

Patrons with Last Name

Patrons in Barcode Range   From   Through

Patrons with Barcodes

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Patron Balance: Enter a balance range to forgive.

Options

Selections	**Options**

◉ All Charges, Fees, and Fines
○ Lost Fees Only
○ Overdue Fines Only
○ Other Charges/Fees

Transaction Date Starting   MM/DD/YYYY 📅

And Ending   MM/DD/YYYY 📅

Choose which charge category to forgive.

Transaction Date Starting: Specify a starting date in MM/I
// selected past charges will be forgiven.

And Ending: Specify an ending date in MM/DD/YYYY form

Move Patrons to Site

⚠️ This utility is only available to those with a Centralized Catalog.

Move Patrons to Site

🔳 **Textbook Tracker**

Moves selected patrons from their current site to the specified site

Use(s)

Run this utility if you accidentally imported patron records to the wrong site and need to move them.

Selections

| Selections | Options |

Move patrons to the site specified under the Options tab for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

| Selections | Options |

New Site   AMS – Adams Middle School ▼

New Site: Specify the new site you would like selected patr

Reassign Union Site Patrons
Reassign Union Site Patrons

Changes the assigned site of selected patrons from the Union Site to the specified site

Use(s)

Patrons are assigned to the Union Site when imports are run with an invalid or non-existent site code. If you made a mistake while importing patron records and they are now assigned to the Union Site, run this utility to assign them to the correct site.

Selections

Selections | Options

Reassign Union Site patrons to the site specified under the Options tab. Reassign:

Patrons added   From MM/DD/YYYY   Through MM/DD/YYYY   ▼

Create Saved Utility   Run

Options

Selections | Options

New Site   AMS – Adams Middle School   ▼

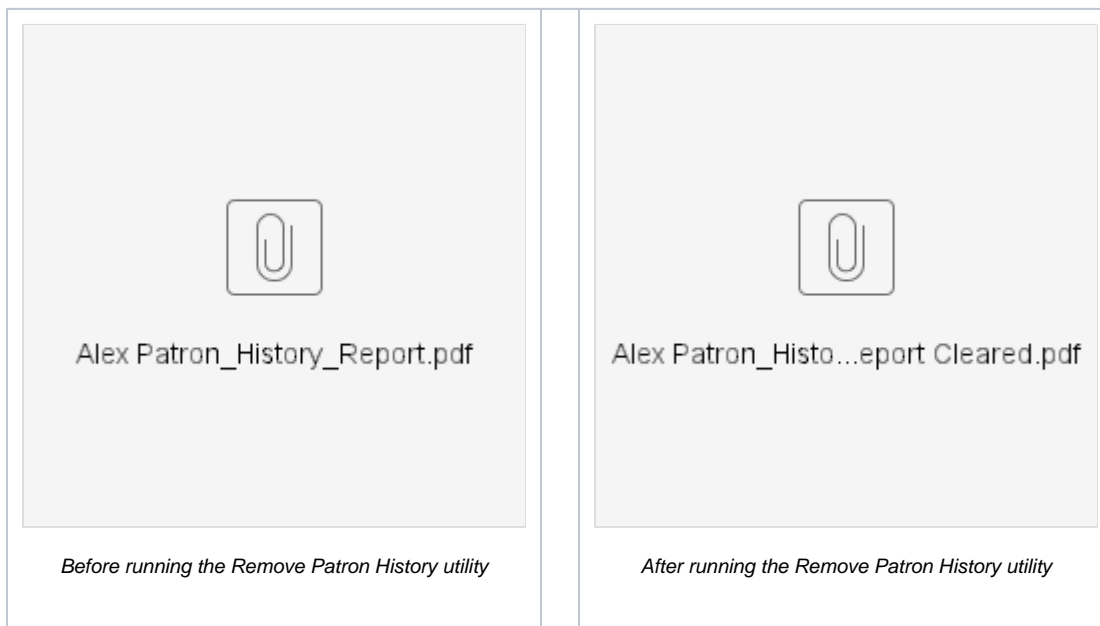**New Site:** Specify the new site you would like selected patr...

Remove Patron History

Remove Patron History

Removes everything but Lexile history from selected patrons' histories

The *Patron History* report shows recent payments (including credits), renewals, lost items, refunds, Lexile history, and returned items for individual patrons. After running this utility, everything but Lexile history is removed:

Alex Patron_History_Report.pdf

Before running the Remove Patron History utility

Alex Patron_Histo...eport Cleared.pdf

After running the Remove Patron History utility

There are two places to automatically download the *Patron History* report for an individual patron:

- **Circulation** > **Actions** menu [Broken image] in the Current Patron > **History**

- **Patrons Management** > **Actions** menu > **Show History**

Use(s)

Run this utility when you need to clear up space in your database, start with a clean slate on statistics, or remove information because of privacy concerns.

Selections

Back to Top

Remove Patron Notes

Remove Patron Notes

Removes all Contact, General, Alert, or Category notes from selected patrons

Use(s)

Run this utility to remove old and temporary notes past librarians may have left.

Note Type: Choose the type of note to remove. *All* notes of ... removed.

Remove Patron Pictures

Remove Patron Pictures

Removes the pictures of selected patrons

Use(s)

If you need to remove patron pictures because they need to be replaced or removed because of privacy concerns, run this utility.

Selections

Remove Patrons

Remove Patrons

Textbook Tracker

Removes selected patron records from your database

Use(s)

- Run this utility at the end of the school year if you re-import your patrons each year and need a clean slate.

- There are two ways to use this utility to remove graduated patrons at the end of the school year:
    - If you keep track of graduation dates in patron records, enter the appropriate date range or relative date in the **Graduation Date** selection.
    - If you use Last Grade in the Grade Table Preferences, enter the user-defined value for Last Grade (most commonly "Graduated") in the **Patrons in Grade** selection.

- If you manage patrons with GG4L or Clever, patrons who have an active record in Alexandria but are no longer included in the synced data will be marked as *Transferred* (this may include graduated and transferred students). Those patron records will need to be removed manually. Run this utility to remove patrons with a status of *Transferred*. You can also run this utility if you update patrons with manual imports, FTP, or SIF; however, you'll select for patrons with a Homeroom (i.e. location) of *Gone*.

> ✓ Check out our Beginning-of-Year Procedures and End-of-Year Procedures for tips and instructions on preparing your library for summer and the new school year.

Selections

Under the Options tab, choose whether or not to include patrons with checked out items or outstanding financial obligations. Remove records for:

Patrons at Site   AMS – Adams Middle School ▼

Patrons with a Status of   Active ▼

Patrons in Security Group   Patron (5) ▼

Patrons with a Policy of   Any Policy ▼

Patrons from   Location ▼   From 🔍   Through 🔍

Patrons in Grade   From   Through

Patrons with Accounts Expiring On   From MM/DD/YYYY 📅   Through MM/DD/YYYY 📅   ▼

Patrons added   From MM/DD/YYYY 📅   Through MM/DD/YYYY 📅   ▼

Optional Date   From MM/DD/YYYY 📅   Through MM/DD/YYYY 📅   ▼

Patrons with Last Name

Patrons in Barcode Range   From   Through

Patrons with Barcodes

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections | **Options**

☐ Remove even with Checked Out or Outstanding Financial Items,

Remove even with Checked Out or Outstanding Financ

When *unchecked*, all selected patrons without checked out
removed. Some things, like reviews, are transferred to the
deleted.

When *checked*, all selected patrons will be removed no mat
will be declared lost, and holds, reservations, charges, and

Renew Patron Cards

Renew Patron Accounts

≡ **Textbook Tracker**

Renews the accounts of all selected patrons

⚠   This utility will only work when **Preferences > Patrons > Patron Rules > Disable account expiration dates** is unchecked.

The number of days a patron's account is active after renewal is determined by patron policies.

Selections

Renew accounts for the time specified in patron policies. Renew accounts for:

Patrons at Site	WHS – Washington High School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons with Accounts Expiring on	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility   Run**

Reset Patron Accounts

Reset Patron Accounts

Textbook Tracker

Resets patron usernames and/or passwords to the chosen formats

Operators *must* have these specific security permissions to run this utility:

- **Management > Patrons > Import, Export and Utilities**
- **Management > Patron Passwords > Edit**

Note that operators can only change the passwords of those with a lower security level than themselves.

Use(s)

- Run this utility at the beginning of the school year to let patrons who have forgotten their usernames and passwords over the summer successfully log into their accounts.

- If students aren't familiar with their barcodes, run this utility to change usernames to something easier to remember, such as their first initial and last name.

Selections

Selections | Options

Set your Options to reset usernames and/or passwords for:

Patrons at Site	AMS – Adams Middle School ▼
Patrons with a Status of	Active ▼
Patrons in Security Group	Patron (5) ▼
Patrons with a Policy of	Any Policy ▼
Patrons from	Location ▼ From 🔍 Through 🔍
Patrons in Grade	From Through
Patrons added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Patrons with Last Name	
Patrons in Barcode Range	From Through
Patrons with Barcodes	

☑ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections | Options

Reset Password By
- ⦿ No Change
- ◯ Last Name (non-secure)
- ◯ Patron (email link)

Reset Username By
- ⦿ No Change
- ◯ Barcode
- ◯ First Initial + Last Name
- ◯ First Name + Last Name
- ◯ Email Address

☐ Use Nickname when available

NOTE: If changing a patron's username would result in a duplicate, tha

Reset Password by

No Change: Choose this option if you *only* want to reset us

Last Name (non-secure): Changes each patron's passwor with special characters or accents in their last name will be password when logging in, as diacritical letters are not supp For security purposes, we strongly recommend that each pa after initially accessing their account.

Patron (email link): Emails patrons a password reset link. their new password.

Reset Username by

No Change: Choose this option if you *only* want to reset pa

Barcode: Changes usernames to each patron's barcode. U default to barcode.

First Initial + Last Name: Changes usernames to each pa last name (e.g. Darla Anderson's username would be "dand

First Name + Last Name: Changes usernames to each pa and last name (e.g. Darla Anderson's username would be "

Email Address: Changes usernames to each patron's ema multiple emails, the utility will use the first one listed in their

Use Nickname when available: When checked, the patron instead of their first name.

⚠ Patrons will be skipped if changing their username They will also be skipped if you're changing userna and they have none listed. After running the utility,

Information 🛈 file to see if any patrons were ski