### **Patrons General Utilities**

### **Operations**

### **Utilities**

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Operations > Utilities > Patrons > General

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

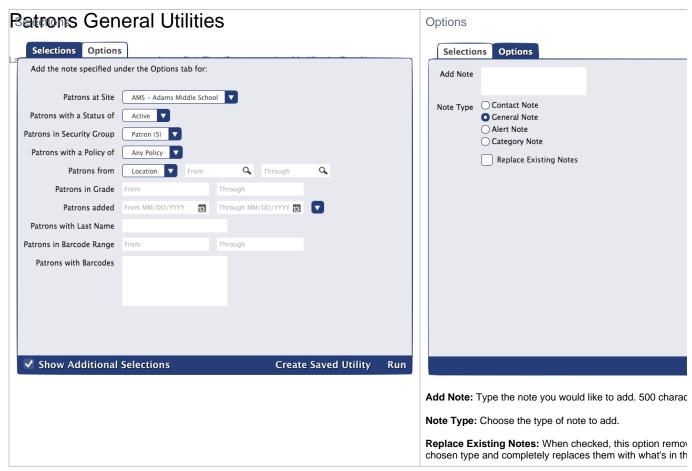
- Change Patron Security Group
- Change Patron Status
- Forgive Charges
  Move Patrons to Site (CC only)
- Reassign Union Site Patrons
- Remove Patron History

- 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

- 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 C ategory Note and type the desired note on the Options tab.



### **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.

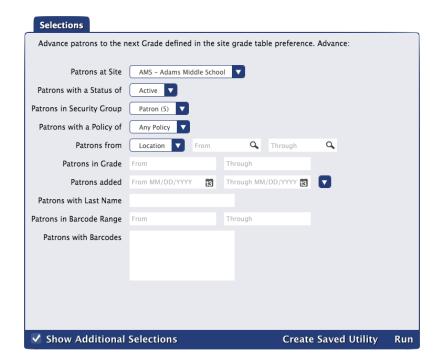
Use(s)

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



# Change Patron Grade Change Patron Grade



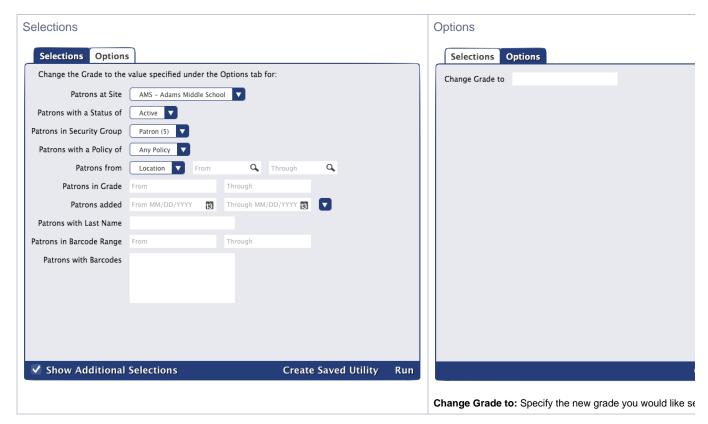
Changes the grade (i.e. level) of selected patrons to the specified grade



"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.



Textbook Tracker

### Change Patron 2nd Location Change Patron 2nd Location

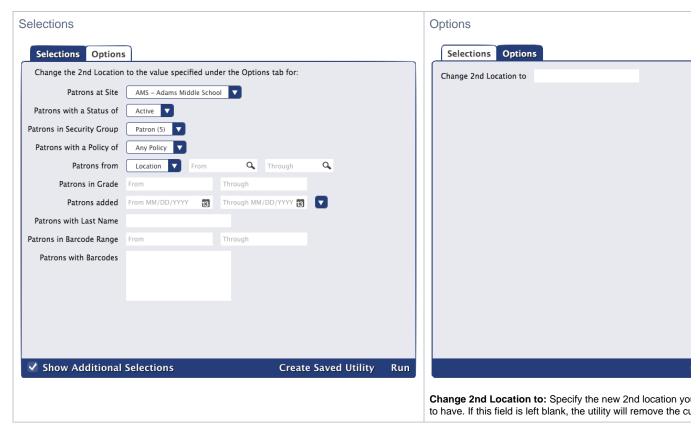
Changes or adds a specified 2nd location for selected patrons



"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.



Textbook Tracker

## Change Patron Location Change Patron Location

Changes the location of selected patrons to the specified location

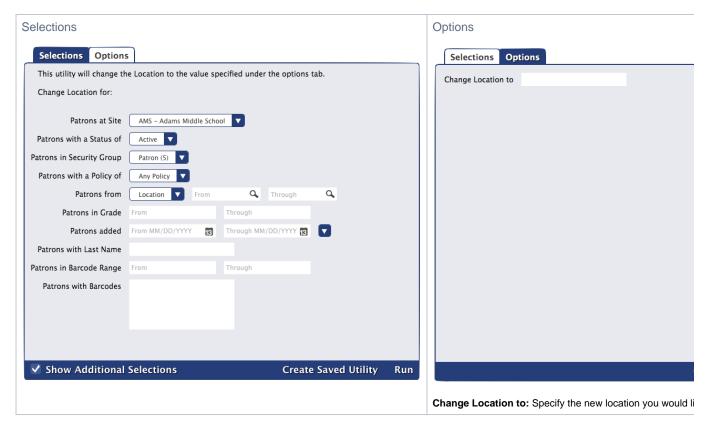




You can also use Authority Control to edit, combine, or remove individual locations.

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

- 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.



### Change Patron Policy Change Patron Policy



Changes the policy of selected patrons to the specified policy



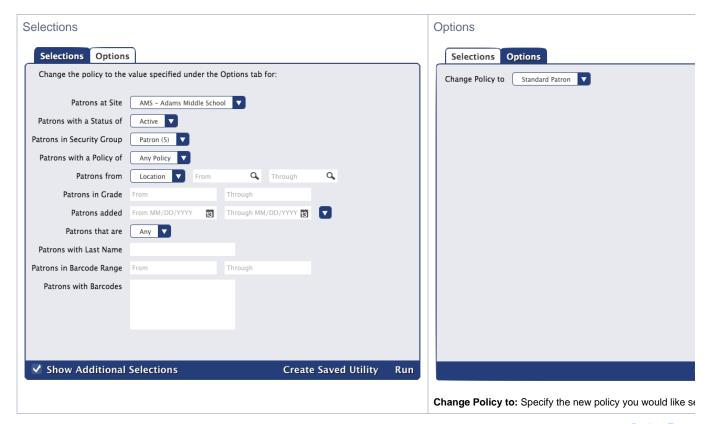
Newly changed patron policies will not affect the loan periods or fines for currently checked out items. To adjust these based on the newly changed policies, run the *Recompute Due Dates* utility after this utility.

### 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



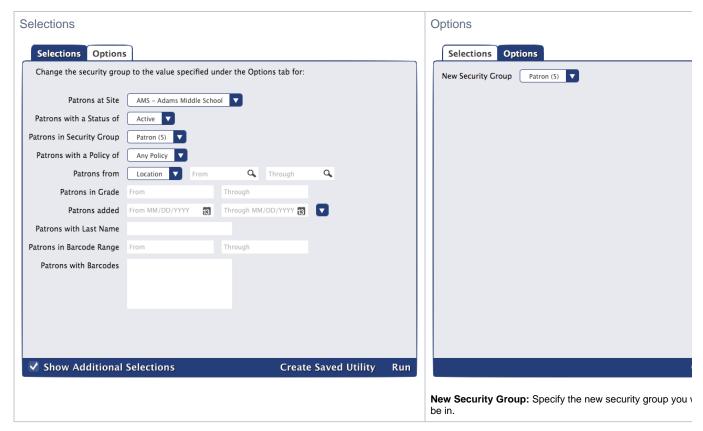
Changes the security group of selected patrons to the specified security group



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.



### **Change Patron Status Change Patron Status**

Changes the status of selected patrons to the specified status

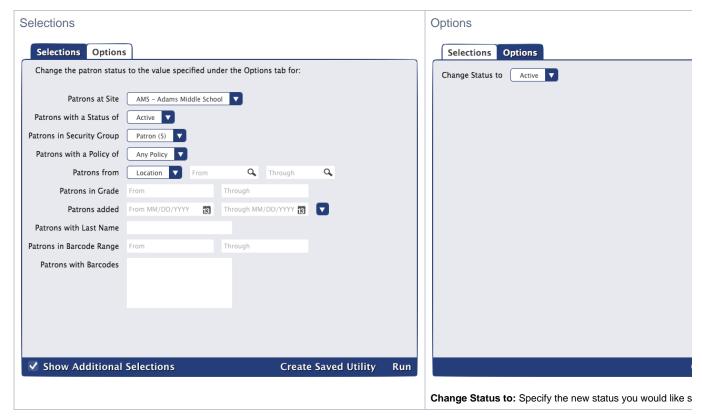
How does each status affect patron permissions?



#### 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.

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## Forgive Charges Forgive Charges

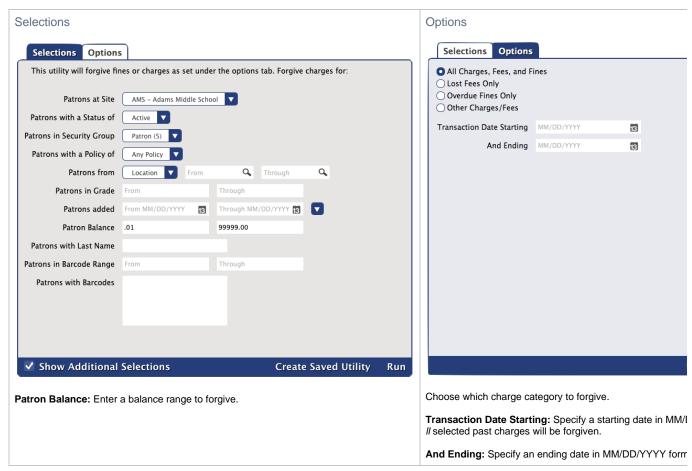


Forgives selected charges, fees, or fines created during the specified transaction date range

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

- 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.

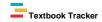


### Move Patrons to Site



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

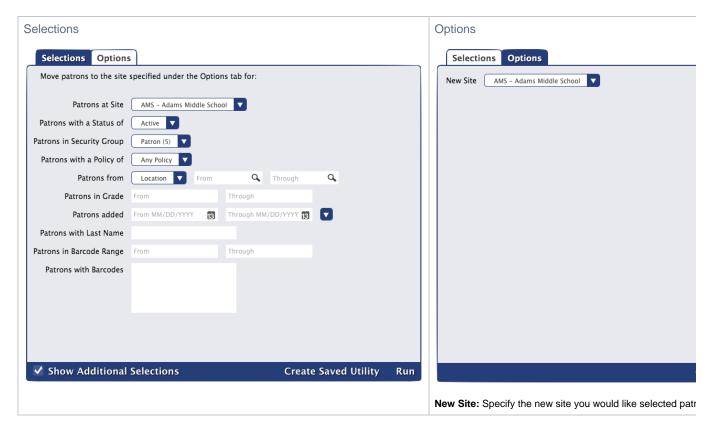
### **Move Patrons to Site**



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.

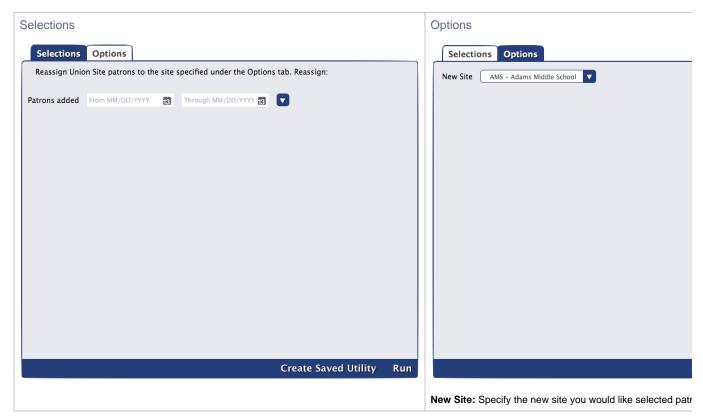


## Reassign Union Site Patrons Reassign Union Site Patrons

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

Use(s)

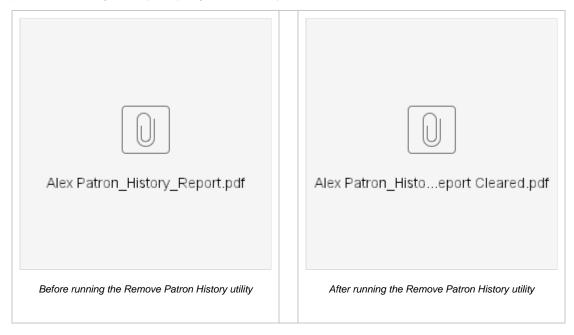
Patrons are assigned to the Union Site when imports are run with an invalid or non-existent site code. If you made a mistake while importing patron records and they are now assigned to the Union Site, run this utility to assign them to the correct site.



# 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:



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



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

Selections				
Remove all patron history records for:				
B				
Patrons at Site	AMS – Adams Middle Scho	ool 🔻		
Patrons with a Status of	Active 🔻			
Patrons in Security Group	Patron (5)			
Patrons with a Policy of	Any Policy			
Patrons from	Location From	Q Through Q		
Patrons in Grade	From	Through		
Patrons added	From MM/DD/YYYY (3)	Through MM/DD/YYYY 🔞		
Patrons with Last Name				
Patrons in Barcode Range	From	Through		
Patrons with Barcodes				
✓ Show Additional Selections		Create Saved Utility	Run	

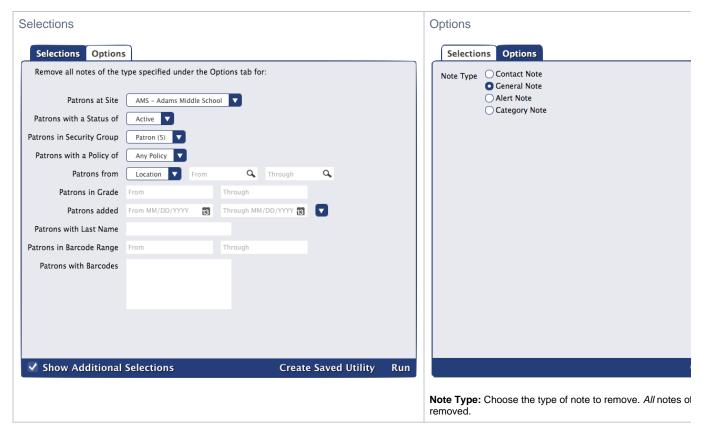
Back to Top

## 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.



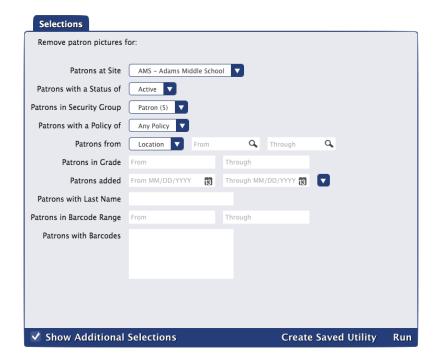
### Remove Patron Pictures Remove Patron Pictures

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**

Removes selected patron records from your database

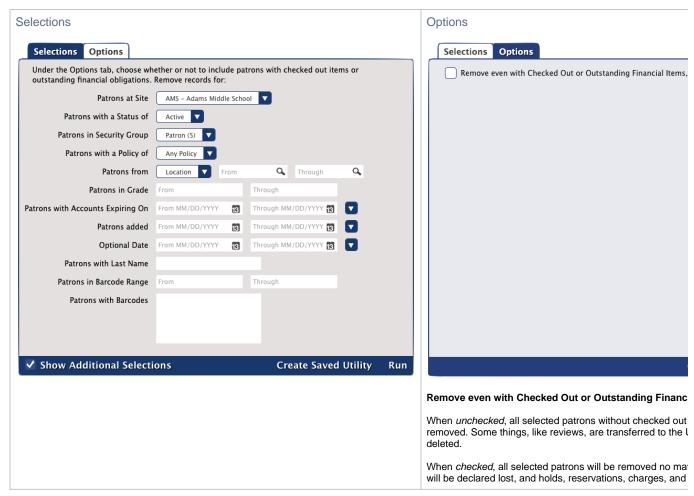
Use(s)

- 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:
  - o If you keep track of graduation dates in patron records, enter the appropriate date range or relative date in the Graduation Date
  - o 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.

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### Renew Patron Cards Renew Patron Accounts

Textbook Tracker

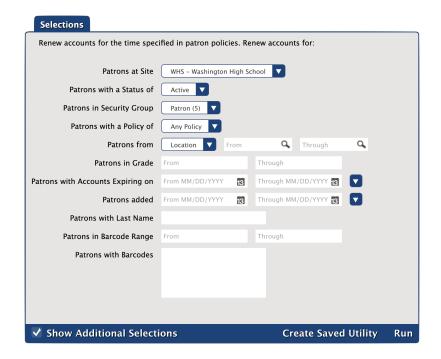
Renews the accounts of all selected patrons



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



Textbook Tracker

### **Reset Patron Accounts Reset Patron Accounts**

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.

- 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 Patrons in Security Group Patrons with a Policy of Patrons from Location V C Through Patrons in Grade Through MM/DD/YYYY 🔞 🔽 Patrons added From MM/DD/YYYY Patrons with Last Name Patrons in Barcode Range 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 changir	g a patron's username would result in a duplicate, th

#### 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 support security purposes, we strongly recommend that each parafter 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. L default to barcode.

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

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 patror 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 *i* file to see if any patrons were skir