

# Patrons General Utilities

## Operations

### Utilities

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Unknown macro: 'rate'

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## 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

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

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## 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

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# 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.

Selections

SelectionsOptions

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

Patrons at SiteAMS – Adams Middle School

Patrons with a Status ofActive

Patrons in Security GroupPatron (5)

Patrons with a Policy ofAny Policy

Patrons fromLocationFromThrough

Patrons in GradeFromThrough

Patrons addedFrom MM/DD/YYYYThrough MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode RangeFromThrough

Patrons with Barcodes

✓ Show Additional Selections

Create Saved Utility

Run

Options

SelectionsOptions

Change Grade to

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


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## 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.

Selections

Options

Selections

Options

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

Selections

Options

Change 2nd Location to

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

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## Change Patron Location

### Change Patron Location



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

SelectionsOptions

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

Options

SelectionsOptions

Change Location to

Change Location to: Specify the new location you would li

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## 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.

Selections

Options

Change the policy 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 that are

Any

Patrons with Last Name

Patrons in Barcode Range

From

Through

Patrons with Barcodes

Show Additional Selections

Create Saved Utility

Run

Options

Change Policy to

Standard Patron

Change Policy to: Specify the new policy you would like se

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## 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.



Selections

SelectionsOptions

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

Patrons at SiteAMS – Adams Middle School

Patrons with a Status ofActive

Patrons in Security GroupPatron (5)

Patrons with a Policy ofAny Policy

Patrons fromLocationFromThrough

Patrons in GradeFromThrough

Patrons addedFrom MM/DD/YYYYThrough MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode RangeFromThrough

Patrons with Barcodes

☒ Show Additional SelectionsCreate Saved UtilityRun

Options

SelectionsOptions

New Security GroupPatron (5)

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

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## Change Patron Status

### Change Patron Status



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

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

Change Status to

Active

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

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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?

- All Charges, Fees, and Fines:** Everything
- Lost Fees Only:** Charge record with a transaction note or description of "Lost"
- Overdue Fines Only:** Charge record with a transaction note or description of "Overdue Fine" or a currently accumulating fine
- 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

Patrons with a Status of

Patrons in Security Group

Patrons with a Policy of

Patrons from  From  Through

Patrons in Grade From  Through

Patrons added From  Through

Patron Balance

Patrons with Last Name

Patrons in Barcode Range From  Through

Patrons with Barcodes

☒ Show Additional Selections

**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

And Ending

Choose which charge category to forgive.

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

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

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## 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.



## 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 <input type="text"/> Through <input type="text"/>
Patrons in Grade	From <input type="text"/> Through <input type="text"/>
Patrons added	From MM/DD/YYYY <input type="text"/> Through MM/DD/YYYY <input type="text"/> ▼
Patrons with Last Name	<input type="text"/>
Patrons in Barcode Range	From <input type="text"/> Through <input type="text"/>
Patrons with Barcodes	<input type="text"/>

✓ 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 patrons to be moved to.

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## 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

SelectionsOptions

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

Patrons added

From MM/DD/YYYY
13

Through MM/DD/YYYY
13

▼

Create Saved Utility

Run

Options

SelectionsOptions

New Site
AMS – Adams Middle School ▼

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

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## 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:

- **Circulation > Actions** menu  Broken image in the [Current Patron > History](#)
- **Patrons Management > Actions** menu  Broken image > **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

Selections

Remove all patron history 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 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

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# 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.

## Selections

Selections

Options

Remove all notes of the type 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

Note Type

☐ Contact Note

☒ General Note

☐ Alert Note

☐ Category Note

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

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# 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

Selections

Remove patron pictures for:

Patrons at Site AMS - Adams Middle School ▼

Patrons with a Status of Active ▼

Patrons in Security Group Patron (S) ▼

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

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## 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:
  - 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

### Selections Options

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 <input type="text"/> Through <input type="text"/>
Patrons in Grade	From <input type="text"/>	Through <input type="text"/>
Patrons with Accounts Expiring On	From MM/DD/YYYY <input type="text"/>	Through MM/DD/YYYY <input type="text"/> ▼
Patrons added	From MM/DD/YYYY <input type="text"/>	Through MM/DD/YYYY <input type="text"/> ▼
Optional Date	From MM/DD/YYYY <input type="text"/>	Through MM/DD/YYYY <input type="text"/> ▼
Patrons with Last Name	<input type="text"/>	
Patrons in Barcode Range	From <input type="text"/>	Through <input type="text"/>
Patrons with Barcodes	<input type="text"/>	

✓ 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 Financial

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

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

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## Renew Patron Cards

### Renew Patron Accounts

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



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

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# 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.

### 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, the

☒ Show Additional Selections Create Saved Utility Run

### Reset Password by

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

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

**Patron (email link):** Emails patrons a password reset link. After clicking the link, they can set their new password.

### Reset Username by

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

**Barcode:** Changes usernames to each patron's barcode. The default is barcode.

**First Initial + Last Name:** Changes usernames to each patron's first initial and last name (e.g. Darla Anderson's username would be "danderson").

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

**Email Address:** Changes usernames to each patron's email address. If a patron has multiple emails, the utility will use the first one listed in their profile.

**Use Nickname when available:** When checked, the utility will use the patron's nickname instead of their first name.



Patrons will be skipped if changing their username and they have no last name listed. They will also be skipped if you're changing usernames and they have none listed. After running the utility,

**Information** file to see if any patrons were skipped.

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