

# Patron Imports Best Practices

## Operations

### Import

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# Patron Imports Best Practices

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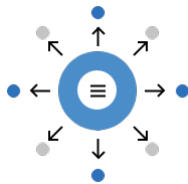
## Overview



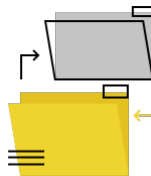
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## Overview

Most libraries import and remove patron records once a year. Depending on how you manage your patrons, there are different steps to ensuring your patron database is properly kept clean and up-to-date.



SIS



Manual Import or FTP



Manual Entry



See our [Beginning-of-Year Procedures](#) and [End-of-Year Procedures](#) for more information on preparing your library for different times of the school year.

## SIS

If you use [GG4L](#) or [Clever](#) to update patron data in Alexandria, here are the steps you should go through each year.



COMPanion will be discontinuing SIF support as of version Alex 22.1 in Summer 2022. [Contact our Sales Team](#) to learn more about GG4L!

## Update records

Enable your SIS integration in Alexandria and sync your new patron data.

- [Enable GG4L](#)
- [Enable Clever](#)

## Change patron policies

Do your patron policies match your patron grade levels? If not, you need to update each patron record so their policy matches their new grade. Run the *Change Patron Policy* utility for each grade.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category on the left.
3. Choose the [Change Patron Policy utility](#) on the right.
4. In the **Selections** tab, enter the criteria needed to select the patrons you intend to update.
  - a. *Patrons with a Status of:* Limit the operation to one particular status, like *Active*, or choose *Any* to include them all.
  - b. *Patrons in Grade:* Enter the user-defined value for the grade that needs to change (e.g. 8th), as defined in Grade Table preferences.
5. In the **Options** tab, choose the policy that will be assigned to the selected patrons.
6. Run the utility.
7. Repeat steps 4-6 for each grade, as needed.



### Do you keep records for graduated patrons?

You can also assign your *Graduated* policy to your recently graduated patrons with the [Change Patron Policy utility](#). If you don't have a Graduated policy, create one first.

## Remove patrons

### Confirm patrons to be removed

Before you remove any patrons, first make sure that you won't accidentally remove anyone who isn't supposed to be removed.

1. Go to **Operations > Reports**.
2. Select the **Patrons > Information** category.
3. Choose the [Patron Information report](#) on the right.
4. On the **Selections** tab, choose the criteria for the patrons you want to remove.
  - a. *Patrons from Homeroom: Gone* (if you used a manual import, FTP, or SIF)
  - b. *Patrons with a Status of: Transferred* (if you use GG4L or Clever)
5. Click **Run**.
6. Download the report PDF from **Operations**.
7. Check for any patrons who *shouldn't* be removed (staff, teachers, etc). If you find any, you'll need to modify their homeroom either manually or by using the [Change Patron Location utility](#) (with the *Patrons with Barcodes* selection).
8. After making any necessary modifications, run this report again and get an updated list.
9. Once your list is acceptable, move on to removing patrons.

### Remove gone and transferred patrons

Now that your student records have been updated, run the *Remove Patrons* utility to remove those patrons who aren't returning.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category on the left.
3. Choose the [Remove Patrons utility](#) on the right.
4. In the **Selections** tab, choose the criteria for the patrons whose records should be removed. Make sure *Patrons from Homeroom* is set to "Gone".
  - a. *Patrons from Homeroom: Gone* (if you used a manual import, FTP, or SIF)
  - b. *Patrons with a Status of: Transferred* (if you use GG4L or Clever)
5. In the **Options** tab, choose if you want to remove patrons matching your criteria who still have items checked out or outstanding financial items. (Optional)
6. Run the utility.

And that's it! You may need to run this utility a few times, depending on your selection criteria.

### Remove graduated patrons

★ **Beginning or End of Year**



Skip this step if you keep records for graduated patrons.

Run a [Patron Information report](#) and select by *Patrons in Grade Graduated* (or whatever your [Last Grade](#) is). Review the PDF to make sure you want to remove everyone who shows up on that list.

Then, run the [Remove Patrons utility](#) to remove graduated students from the database. You may need to run it multiple times with different selections, depending on your needs.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category.
3. Choose the [Remove Patrons utility](#) on the right.
4. On the **Selections** tab, enter the criteria needed to select the individual patrons or groups of patrons you intend to remove. Make sure the correct status is selected (like *Active* or *Transferred*, or choose *Any* to include them all). Then depending on your method for tracking graduated patrons, you can use two different selections:

- a. If you keep track of graduation dates in [patron records](#), enter the appropriate date range or relative date in the *Graduation Date* field.

The screenshot shows the 'Remove records for' dialog box with the 'Options' tab selected. The 'Graduation Date' field is highlighted with a red box, showing a date range from 05/05/2020 to 05/05/2020. Other fields include 'Patrons at Site' (AMS - Adams Middle School), 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Any Group), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Location), 'Patrons in Grade' (From/Through), 'Patrons with Cards Expiring On' (From/Through), and 'Patrons added' (From/Through).

- b. If you use Last Grade in the [Grade Table Preferences](#), enter the user-defined value for Last Grade in the *Patrons in Grade* field (most commonly "Graduated").

The screenshot shows the 'Remove records for' dialog box with the 'Options' tab selected. The 'Patrons in Grade' field is highlighted with a red box, showing the value 'Graduated'. Other fields include 'Patrons at Site' (AMS - Adams Middle School), 'Patrons with a Status of' (Active), 'Patrons in Security Group' (Any Group), 'Patrons with a Policy of' (Any Policy), 'Patrons from' (Location), 'Patrons in Grade' (From/Through), 'Patrons with Cards Expiring On' (From/Through), and 'Patrons added' (From/Through).

- On the **Options** tab, choose if you want patrons to be removed even if they have items checked out or outstanding charges.
- Click **Run**.

## Manual Import or FTP

### Manual Import or FTP

Here are the steps to follow if your library updates patron data through a text file in a tab-delimited file format; most word-processing and spreadsheet applications support files in tab-delimited format. In most cases, patron data is readily available in a machine-readable format from your school's front or district office.

### 1. Change patron locations

If your tab-delimited import file includes patron homerooms, change the homeroom for all of your currently-enrolled students to the same value. This example will replace the homeroom for all of your currently enrolled students to "Gone".

- Go to **Operations > Utilities**.
- Select the **Patrons > General** category.
- Choose the [Change Patron Location](#) utility on the right.
- In the **Selections** tab, choose the options needed to select a group of *student* patron records. For example, you may want to select a student-only policy and/or security group — you don't want to accidentally update operators and/or staff records.

- a. *Patrons with a Status of:* Active
  - b. *Patrons in Security Group:* Patron
  - c. *Patrons with a Policy of:* (Student)
  - d. *Patrons from:* Homeroom
    - i. Leave the From and Through fields blank if you want to update them all.
5. In the **Options** tab, type "Gone" in the *Change Location to* field.
  6. Run the utility.

The Homeroom field for all of the patrons matching your selections will be changed to "Gone". Next, import your new student records from your SIS.



If you changed the term "Location" to "Homeroom" in [Localization Preferences](#), the utility will show up as *Change Patron Homeroom*. If not, it will show up as *Change Patron Location*.

## 2. Run the import

Either set up and run a [Quick Patron Import](#) or [Saved Patron Import](#) (FTP). For FTP imports, you could either set up a daily schedule and wait for it to run the following day, or run the import to make sure it's set up correctly and then set the schedule to run daily.

### Quick Patron Import

See [Quick Patron Import](#) for how to run quick imports.

1. Go to **Operations > Import**.
2. Select the **Patrons** category on the left.
3. In the **Imports** pane, click **Choose File**. Locate the import file on your computer.
4. In the **Settings** tab, make the following selections:
  - *Skip First Record*: Check if the first record in your import file is an unrecognized header.
  - *Patron Updates*: Allow Import to Modify Existing Records
5. Run the import.

## 3. Change patron policies



If you're using a scheduled FTP import, wait until the following day after it's run to change patron policies.

Do your patron policies match your patron grade levels? If not, you need to update each patron record so their policy matches their new grade. Run the *Change Patron Policy* utility for each grade.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category on the left.
3. Choose the [Change Patron Policy utility](#) on the right.
4. In the **Selections** tab, enter the criteria needed to select the patrons you intend to update.
  - a. *Patrons with a Status of*: Limit the operation to one particular status, like *Active*, or choose *Any* to include them all.
  - b. *Patrons in Grade*: Enter the user-defined value for the grade that needs to change (e.g. 8th), as defined in Grade Table preferences.
5. In the **Options** tab, choose the policy that will be assigned to the selected patrons.
6. Run the utility.
7. Repeat steps 4-6 for each grade, as needed.



### Do you keep records for graduated patrons?

You can also assign your *Graduated* policy to your recently graduated patrons with the [Change Patron Policy utility](#). If you don't have a Graduated policy, create one first.

## 4. Remove patrons

### Confirm patrons to be removed

Before you remove any patrons, first make sure that you won't accidentally remove anyone who isn't supposed to be removed.

1. Go to **Operations > Reports**.
2. Select the **Patrons > Information** category.
3. Choose the [Patron Information report](#) on the right.
4. On the **Selections** tab, choose the criteria for the patrons you want to remove.
  - a. *Patrons from Homeroom*: Gone (if you used a manual import, FTP, or SIF)
  - b. *Patrons with a Status of*: Transferred (if you use GG4L or Clever)
5. Click **Run**.
6. Download the report PDF from **Operations**.

7. Check for any patrons who *shouldn't* be removed (staff, teachers, etc). If you find any, you'll need to modify their homeroom either manually or by using the [Change Patron Location utility](#) (with the *Patrons with Barcodes* selection).
8. After making any necessary modifications, run this report again and get an updated list.
9. Once your list is acceptable, move on to removing patrons.

## Remove gone and transferred patrons

Now that your student records have been updated, run the *Remove Patrons* utility to remove those patrons who aren't returning.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category on the left.
3. Choose the [Remove Patrons utility](#) on the right.
4. In the **Selections** tab, choose the criteria for the patrons whose records should be removed. Make sure *Patrons from Homeroom* is set to "Gone".
  - a. *Patrons from Homeroom: Gone* (if you used a manual import, FTP, or SIF)
  - b. *Patrons with a Status of: Transferred* (if you use GG4L or Clever)
5. In the **Options** tab, choose if you want to remove patrons matching your criteria who still have items checked out or outstanding financial items. (Optional)
6. Run the utility.

And that's it! You may need to run this utility a few times, depending on your selection criteria.

## Remove graduated patrons

★ **Beginning or End of Year**

⚠ Skip this step if you keep records for graduated patrons.

Run a [Patron Information report](#) and select by *Patrons in Grade Graduated* (or whatever your [Last Grade](#) is). Review the PDF to make sure you want to remove everyone who shows up on that list.

Then, run the [Remove Patrons utility](#) to remove graduated students from the database. You may need to run it multiple times with different selections, depending on your needs.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category.
3. Choose the [Remove Patrons utility](#) on the right.
4. On the **Selections** tab, enter the criteria needed to select the individual patrons or groups of patrons you intend to remove. Make sure the correct status is selected (like *Active* or *Transferred*, or choose *Any* to include them all). Then depending on your method for tracking graduated patrons, you can use two different selections:
  - a. If you keep track of graduation dates in [patron records](#), enter the appropriate date range or relative date in the *Graduation Date* field.

SelectionsOptions

Remove records for:

Patrons at SiteAMS – Adams Middle School

Patrons with a Status ofActive

Patrons in Security GroupAny Group

Patrons with a Policy ofAny Policy

Patrons fromLocation

From

Through

Patrons in Grade

From

Through

Patrons with Cards Expiring On

From MM/DD/YYYY

Through MM/DD/YYYY

Patrons added

From MM/DD/YYYY

Through MM/DD/YYYY

Graduation Date

05/05/2020

05/05/2020

Show Additional Selections

Create Saved Utility

Run

- b. If you use Last Grade in the [Grade Table Preferences](#), enter the user-defined value for Last Grade in the *Patrons in Grade* field (most commonly "Graduated").

Remove records for:

Patrons at Site: AMS - Adams Middle School

Patrons with a Status of: Active

Patrons in Security Group: Any Group

Patrons with a Policy of: Any Policy

Patrons from: Location

Patrons in Grade: Graduated

Patrons with Cards Expiring On: From MM/DD/YYYY Through MM/DD/YYYY

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

Graduation Date: From MM/DD/YYYY Through MM/DD/YYYY

Show Additional Selections Create Saved Utility Run

5. On the **Options** tab, choose if you want patrons to be removed even if they have items checked out or outstanding charges.
6. Click **Run**.

## Manual Entry

### Manual Entry

Some libraries, such as small schools and public libraries, update their patron records manually in [Patrons Management](#). Exact procedures for users in this group will vary depending on your library type, but here are some general steps that may be helpful. [Contact Customer Support](#) if you need assistance figuring out the best procedure for your library.

### 1. Advance patrons

★ **Beginning or End of Year**

If you have a school library, advance patron grade levels all at once. Some libraries do it at the end of the year, and others do it at the beginning of the year. Either way is fine, just don't skip it.

[Grade Table in Patron Preferences](#)

[Advance patron grade levels](#)

There are two ways to advance your patron grade levels for the next year. *Advance All Grades* in Patron Preferences is the easiest option, but the *Advance Patron Grade* utility allows you to advance a more select group of patrons. Patrons who advance past the final grade in the grade table are assigned the value for Last Grade, which is usually "Graduated". You may only need to do this step if you want to keep track of graduated students. Otherwise, your import will update grade information.

#### Advance All Grades

Advance all of your patrons to the next grade level at the same time.

1. Go to [Preferences > Patrons](#).
2. Open the [Grade Table](#) tab.
3. Double-check the grade table and the *Last Grade* field for accuracy.
4. Check the *Advance Grade After* date, and change it if necessary. This is usually the graduation date or the last day of school.
5. Click **Advance All Grades**.

#### Advance Patron Grade utility

Need to be more precise about which patrons to advance? Select patrons by one or more options, including status, security group, policy, homeroom, grade, last name, and barcode.

1. Go to [Operations > Utilities](#).
2. Select **Patrons > General** category on the left.
3. Choose the [Advance Patron Grade utility](#) on the right.
4. In the **Selections** tab, enter the criteria needed to select the patrons you intend to update.
5. Click **Run**.

## 2. Add new patrons

Go into **Patrons Management** and [add new patron records](#).

## 3. Change patron policies

Do your patron policies match your patron grade levels? If not, you need to update each patron record so their policy matches their new grade. Run the *Change Patron Policy* utility for each grade.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category on the left.
3. Choose the [Change Patron Policy utility](#) on the right.
4. In the **Selections** tab, enter the criteria needed to select the patrons you intend to update.
  - a. *Patrons with a Status of:* Limit the operation to one particular status, like *Active*, or choose *Any* to include them all.
  - b. *Patrons in Grade:* Enter the user-defined value for the grade that needs to change (e.g. 8th), as defined in Grade Table preferences.
5. In the **Options** tab, choose the policy that will be assigned to the selected patrons.
6. Run the utility.
7. Repeat steps 4-6 for each grade, as needed.



### Do you keep records for graduated patrons?


You can also assign your *Graduated* policy to your recently graduated patrons with the [Change Patron Policy utility](#). If you don't have a Graduated policy, create one first.

## 4. Remove patrons

You can either remove patrons in **Patrons Management** manually or use utilities to remove multiple patrons at once. If you decide to go with utilities, public libraries may want to remove patrons by card expiration dates, and school libraries may want to remove patrons who are graduated.

### Confirm patrons to be removed

If you plan on removing patrons who are graduated, run a report before removing those patrons to see who will be included. This will ensure you won't accidentally remove anyone who isn't supposed to be removed.

1. Go to **Operations > Reports**.
2. Select the **Patrons > Information** category.
3. Choose the [Patron Information report](#) on the right.
4. On the **Selections** tab, choose the criteria for the patrons you want to remove.
  - a. *Patrons in Grade:* Graduated (if you are a school library)
5. Click **Run**.
6. Download the report PDF from  **Operations Management**.
7. Check for any patrons who *shouldn't* be removed (staff, teachers, etc). If you find any, you'll need to modify their grade.
8. After making any necessary modifications, run this report again and get an updated list.
9. Once your list is acceptable, move on to removing patrons.

### Remove patrons by card expiration dates

Run the *Remove Patrons* utility to remove those with cards that have expired.

1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category on the left.
3. Choose the [Remove Patrons utility](#) on the right.
4. In the **Selections** tab, choose the criteria for the patrons whose records should be removed.
  - a. *Patrons with Cards Expiring On:* Enter a date range.
5. In the **Options** tab, choose if you want to remove patrons matching your criteria who still have items checked out or outstanding financial items. (Optional)
6. Run the utility.

And that's it! You may need to run this utility a few times, depending on your selection criteria.

### Remove patrons who are graduated

★ **Beginning or End of Year**

⚠ Skip this step if you keep records for graduated patrons.

Run a [Patron Information report](#) and select by *Patrons in Grade* Graduated (or whatever your [Last Grade](#) is). Review the PDF to make sure you want to remove everyone who shows up on that list.

Then, run the [Remove Patrons utility](#) to remove graduated students from the database. You may need to run it multiple times with different selections, depending on your needs.



1. Go to **Operations > Utilities**.
2. Select the **Patrons > General** category.
3. Choose the [Remove Patrons utility](#) on the right.
4. On the **Selections** tab, enter the criteria needed to select the individual patrons or groups of patrons you intend to remove. Make sure the correct status is selected (like *Active* or *Transferred*, or choose *Any* to include them all). Then depending on your method for tracking graduated patrons, you can use two different selections:
  - a. If you keep track of graduation dates in [patron records](#), enter the appropriate date range or relative date in the *Graduation Date* field.

**Selections** **Options**

Remove records for:

Patrons at Site: AMS – Adams Middle School ▼

Patrons with a Status of: Active ▼

Patrons in Security Group: Any Group ▼

Patrons with a Policy of: Any Policy ▼

Patrons from: Location ▼ From [ ] Through [ ]

Patrons in Grade: From [ ] Through [ ]

Patrons with Cards Expiring On: From MM/DD/YYYY [ ] Through MM/DD/YYYY [ ]

Patrons added: From MM/DD/YYYY [ ] Through MM/DD/YYYY [ ] ▼

**Graduation Date**: 05/05/2020 [ ] 05/05/2020 [ ] ▼

☐ Show Additional Selections Create Saved Utility Run

- b. If you use Last Grade in the [Grade Table Preferences](#), enter the user-defined value for Last Grade in the *Patrons in Grade* field (most commonly "Graduated").

**Selections** **Options**

Remove records for:

Patrons at Site: AMS – Adams Middle School ▼

Patrons with a Status of: Active ▼

Patrons in Security Group: Any Group ▼

Patrons with a Policy of: Any Policy ▼

Patrons from: Location ▼ From [ ] Through [ ]

**Patrons in Grade**: Graduated Graduated

Patrons with Cards Expiring On: From MM/DD/YYYY [ ] Through MM/DD/YYYY [ ]

Patrons added: From MM/DD/YYYY [ ] Through MM/DD/YYYY [ ] ▼

Graduation Date: From MM/DD/YYYY [ ] Through MM/DD/YYYY [ ] ▼

☐ Show Additional Selections Create Saved Utility Run

5. On the **Options** tab, choose if you want patrons to be removed even if they have items checked out or outstanding charges.