

End-of-year prep—Managing patrons

April 19th, 2021

One of the last steps in getting your library set for summer includes managing your patron records. While it's recommended to do most patron management at the start of the school year, here's something you can do now to get a head start...

Version 7

If you don't keep records for graduated patrons, follow the steps on the [Remove Graduated Patrons](#) tab of our End-of-Year Procedures. Note that if you manually add patron records rather than importing, you'll need to [advance patron grades](#) first.

Then, once it comes time to update your patron records, check out our [Patron Imports Best Practices](#) page for instructions on importing, updating policies, and removing other patrons. If you don't update patron records until the beginning of the year, don't worry about doing that quite yet!



Use [GG4L](#) or [Clever](#) for easy peasy patron management.

Version 6

Check out the [Advancing Patron Grades](#), [Remove Graduated Students](#), and [Update Your Patrons' Policies](#) sections of our End-of-Year Procedures.



Do you import patron information yearly or use the saved import option of the SIS Integration package?

For both v6 and v7 users, following these steps will make it easy to identify records later on that need to be deleted or manually modified after your import:

1. Identify a commonly used field in your patron records that's also included in the import file, such as the Grade field.
2. Use the corresponding [patron utility](#) (such as the [Change Patron Grade utility](#)) to modify the chosen field to a term that stands out, like "Last Year" or "Transferred." Note that if staff/teacher records aren't imported at the beginning of the year, you will need to exclude them from this utility or manually modify their records.

Before you go...

Feel free to contact our 24/7 Support team at 1-800-347-4942 or support@goalexandria.com if you need additional help or have questions. We wish you the best and hope you stay safe!



Still on version 6? [Learn about switching to Alexandria 7!](#)

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