

# Patron Preferences

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 this information has been moved to <https://support.goalexandria.com/preferences/patrons-preferences/>

Use these preferences to configure some of the default settings applied to new patrons when they are added to Textbook Tracker.

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Click the tabs below to expand for more information.

# Patron Defaults

## Patron Defaults

SITE-A/TT

Textbook Tracker

Hi, Demo  
Mia Middle School

SITE-A/TT

### Preferences - Patrons

Still getting used to it? Switch to the old view.

- Patron Defaults
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- Grade Table

#### Barcode

New patrons are assigned the next available barcode number unless you assign them a number manually. Set this field when you first configure Alexandria so that new patrons are automatically assigned barcodes that coincide with your numbering strategy.

Next Barcode  
1100001

#### Policy

Policies control the rules of circulation and statistic groups. The default policy is applied when patrons are manually added or when the policy is unspecified in patron imports.

Default Policy  
Standard Patron

#### Security

Security groups control user access to the program, so the default should usually be set to **Patron** or **Patron Limited**. The default security group is applied when patrons are manually added or when security group is unspecified in patron imports.

Default Security Group  
Patron (5)

Tips  
Try the Intro tutorial from the help menu!  
Read More

### Barcode

#### Next Barcode

New patrons are assigned this, the next available barcode number, unless you assign them a number manually. You should set this field when you first configure Alexandria so that new patrons are assigned barcodes that coincide with your numbering strategy.

### Policy

#### Default Policy

Select the default patron policy to use for new patrons. If a user-created patron policy is selected and later removed from your Policies, this preference will revert back to Standard Patron. Review the Policies section for more information about implementing policies for patrons and items.

### Security

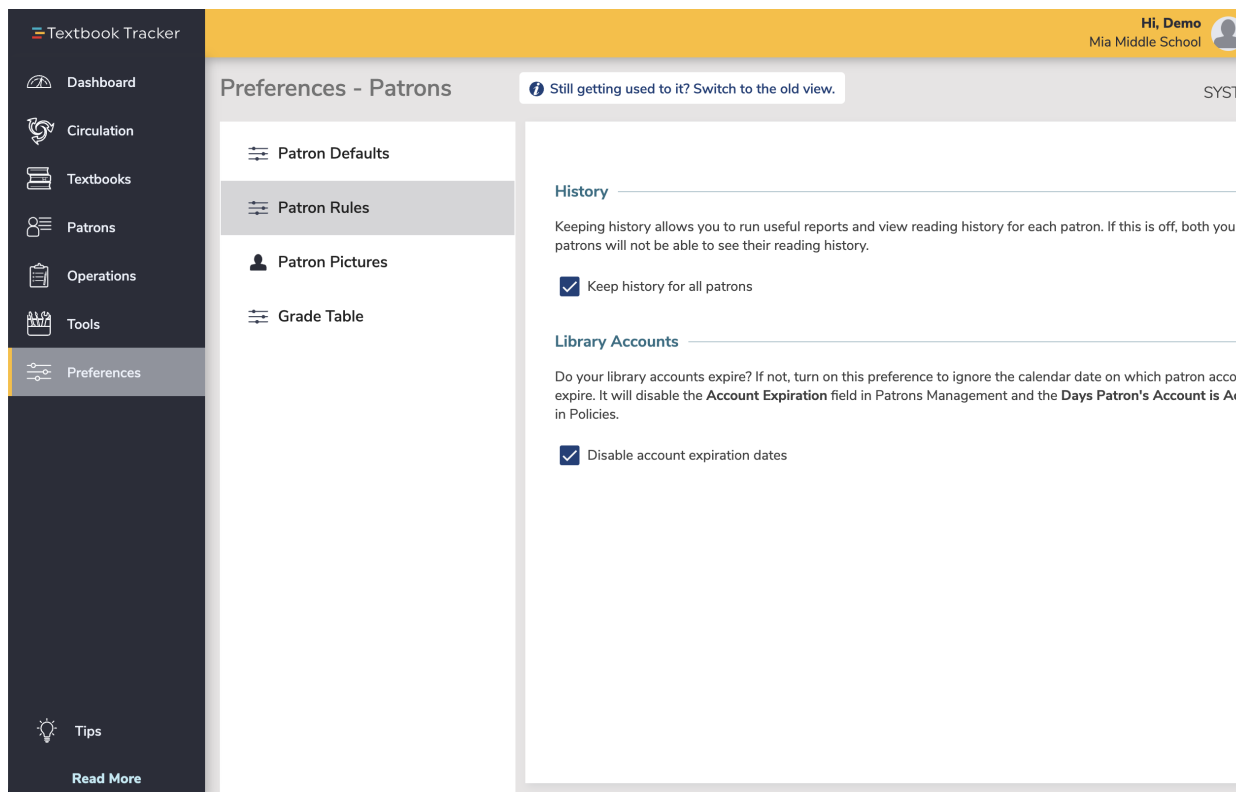
#### Default Security Group

Select the security group you want applied to new patrons by default; ordinarily, this should always be set to Patron or Patron Limited. Review the section Preferences Configuration Security for more information about assigning (and removing) access levels for patrons and operators.

# Patron Rules

## Patron Rules

SYSTEM-A/TT



## History

**Keep history for all patrons.** When checked, a complete transaction history will be kept for all the patrons who are added to your library system.

## Library Accounts

**Disable account expiration dates.** Ignores the calendar date when patron accounts expire, and disables the Account Expiration field in Patrons Management and the Days Patron's Account is Active field in Policies.

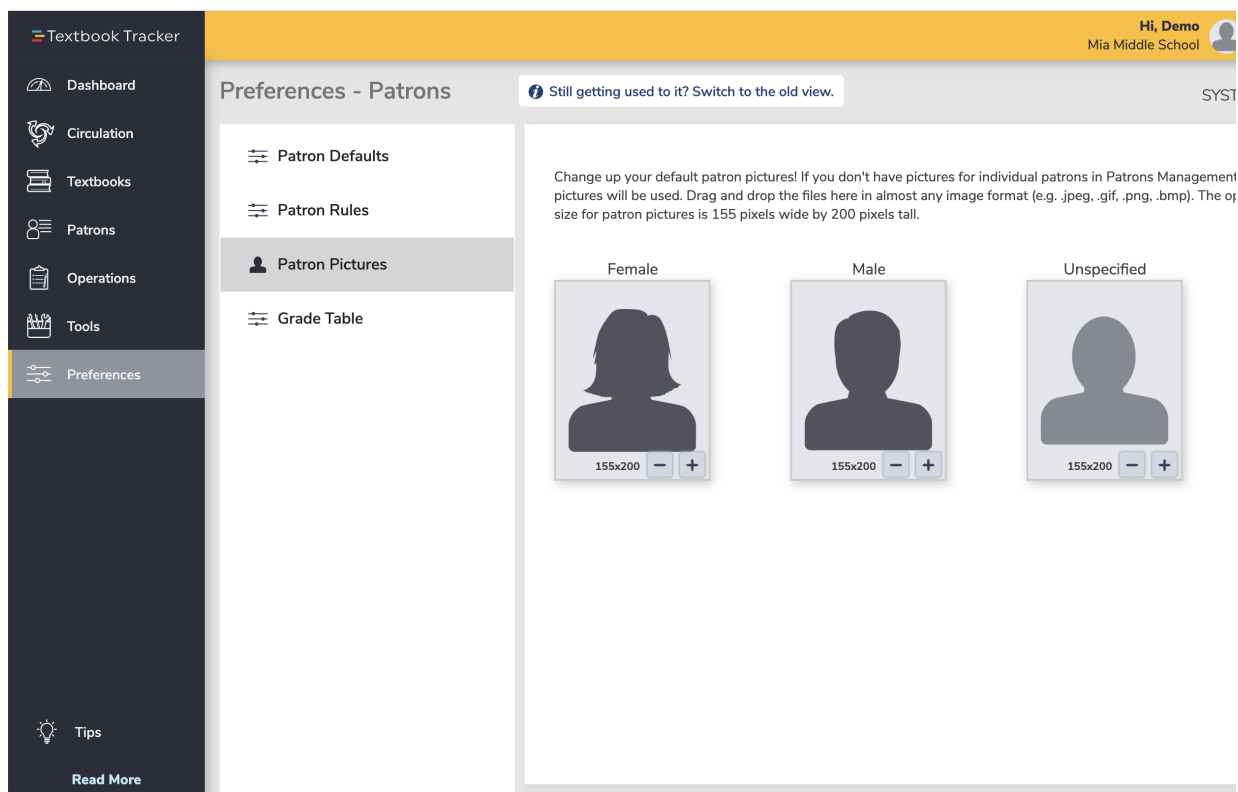
# Patron Pictures

## Patron Pictures

SYSTEM-A/TT

You can apply generic Male, Female, or Unspecified images to patrons if they don't have an individual profile picture attached to their record on the Personal tab of Patrons Management; pictures are assigned based on the gender value selected for each patron.

You can affix nearly any image supported by your browser (commonly accepted formats are JPEG, GIF, PNG, or BMP) into one of the three gender-based patron picture fields. If you don't have individual patron portraits assigned on the Personal tab of Patrons Management, these pictures will be used instead. Optimal image size for patron pictures is 155 pixels wide by 200 high.



## Grade Table

### Grade Table

SYSTEM-A/TT

Individually enter each grade level relevant to your union in the order they should be sorted and incremented. This is a simple list; the first entry in the Grade Table will be your first grade level, the second will be the next grade level, etc. The Grade and Description entries in the table are fully customizable, allowing you to use whatever terminology you desire. Grades must be advanced manually at the end of each school year by using the Advance All Grades button or the Advance Patron Level utility. Using one of these utilities, you can advance your patrons to the next grade level until they reach the Last Grade level (e.g. Graduated); patrons will never advance past the Last Grade level.

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Hi, Demo

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SYSTEM-A/TT

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Grade Table

What levels (i.e. grades) are used at your site or collection of sites? Make sure the levels are entered here in the order they should be sorted and incremented, and take advantage of level selections in your reports, notices, and utilities.

When a patron is advanced beyond what you have in the table, they are assigned the Last Grade (e.g. Graduated) and can be easily removed using utilities or retained for reporting.

Last Grade

Graduated

Advance After

7/1/2024

Last date of advancement: Never

Advance all grades now

Sort	Grade	Description
1	2	2nd Grade
2	3	3rd Grade
3	4	4th Grade
4	5	5th Grade
5	6	6th Grade
6	7	7th Grade
7	8	8th Grade
8	9	9th Grade
9	10	10th Grade
10	11	11th Grade
11	12	12th Grade

EDIT

REMOVE

ADD

## Last Grade

This user-defined field defines your patron's highest (and final) level of advancement. This level will be assigned to patrons who go beyond the levels defined in the Grade Table. Patrons will not be advanced out of this level when grades are advanced. Default is Graduated and the field must contain a value—it cannot be left blank.

## Advance After

This value is used to compute the projected graduation date when importing StudentPersonal objects using SIF. Never rearrange the grade table if you are importing with SIF. Changing the Advance Grade After (usually graduation date) does not advance a Grade; changing a Grade does not change the graduation date.

## Last Date of Grade Advancement

This non-editable field shows when the latest Advance All Grades operation was performed; the date is updated after the utility has completed.

## Add

Add a new grade.

## Advance all grades now

Each time this is clicked, you essentially add one grade level to each of your patrons until they reach the Last Grade level (described above). To elucidate, each patron in your database that has been applied a level that you defined in your Grade Table will have their level transitioned to the next grade in the table. For example, a patron with the grade level of 6 will advance to 7. COMPanion recommends that you perform an Archive before using the Advance All Grades button. Patrons whose grade/level is either not found or not defined in the Grade Table will not have their grade level advanced.

Grades in the Grade Table need to *exactly match* the Grade entry in the Patron Management record for the Advance All Grades utility to work. Often, the grades defined in the patron record are mistakenly padded with "0"s which causes the Advance Grade Utility to fail.

Another example of an error-causing incongruence would be a patron with "5th" in the **Grade** field of their patron record when "5" is the standard defined in the **Grade Table** preferences.