

# Patron Tabs

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this page and all sections has been moved to <https://support.goalexandria.com/patrons/patrons-tabs/>

<b>Personal</b>	Contact	Access	Notes	Statistics
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Click the tabs below to expand for more information about the Patrons tabs.

## Personal

These records are shared with Alexandria.

Personal	Contact	Access	Notes	Statistics
<b>Identifiers</b>				
Student # <input type="text" value="1223"/>	Birth Date <input type="text" value="mm/dd/yyyy"/>	Sex <input type="text" value="Male"/>		
SSN <input type="text"/>	Nickname	<input type="text"/>		
<b>Locators</b>				
Homerroom * <input type="text" value="Simon"/>	2nd Location * <input type="text" value="Giles"/>	Grade * <input type="text" value="07"/>		
<b>Dates</b>				
Graduation Date <input type="text" value="mm/dd/yyyy"/>	Account Expiration <input type="text" value="1/1/2100"/>	Suspension End <input type="text" value="mm/dd/yyyy"/>		
GUID 52ab4b6c-3fa8-4512-84ba-cdf				

## Personal Information

### First Name

Enter the patron's first name.

### Nickname

Enter the patron's nickname if they have one. This could be a shortened version of their first name or an entirely different name they prefer to go by. It will be displayed in parentheses after their first name in both Patrons Management and the Circulation Current Patron pane. Also, a patron's nickname will be used in place of their first name in Self-Service, Activity, Status, and all emails from the library (except receipts). This field is optional.

### Middle Name

Enter the patron's middle name or initial. Optional.

### Last Name

Enter the patron's last name.

### Barcode

Each patron and operator is assigned a unique barcode up to 15 characters long, based on the value set in **Preferences > Patrons**. You can change the assigned barcode here.

- Textbook Tracker reserves barcodes 1–50 for system use.
- Barcodes must be at least three characters long, but we recommend eight characters to allow for growth.
- Barcode length should be consistent throughout your collection. However, item and patron barcodes cannot overlap, so we recommend using a different but consistent length for each (i.e. eight characters for patron barcodes, and ten characters for item barcodes).
- Numeric characters are recommended, but alphabetic characters are allowed. Barcodes must end in a number.
- Barcodes are treated like words, which means they will be sorted alphabetically, *not* numerically.

• Alphabetically	Numerically
123456	200
1377	1377
200	45658

45658	62930
62930	89702
89702	123456

## Policy

The policy that you assign to a patron or operator determines the library rules to which this patron or operator must adhere. To choose a policy for a patron, click the arrow at the end of the **Policy** dropdown menu and select a value. New patrons are automatically assigned a policy based on the default policy setting in [Preferences > Patrons](#).

## Sex

Use this dropdown menu to identify the patron's sex: **Male**, **Female**, or **Unspecified**. Sex is set to Unspecified until otherwise specified.

## Site

Select the site or school that your patron attends. The list sites is pulled from [Sites Management](#).

## Custom Fields

These fields can be customized to fit your needs in [Localization Preferences](#). To ensure the accuracy of your reports, it is important to be *consistent* when entering information in these fields.

### Homeroom [Location]

The location of a patron in a school is typically the student's homeroom or first period class. To ensure the accuracy of reports, be *consistent* when entering information in this field. Reports can be generated and sorted by this field. For example, you can print an overdue list of all students in a homeroom with overdue items.

### 2nd Location [Sublocation]

Use this field to group patrons by a second location or to track any other useful data. You can enter letters, numbers, as well as spaces in this field. Reports can be generated and sorted by this field. Therefore, to ensure the accuracy of reports, be *consistent* when entering information in this field. You could, for example, use this field to classify the ethnicity of patrons for government or internal reports.

### Student # [Community ID]

Enter the patron's student number or other local ID. This could be a student code, phone number, parcel number, or other unique identification code.

### SSN [Government ID]

Enter the patron's government ID here. In the United States, this is typically a social security number (SSN) or drivers license number.

### Grade [Level]

This field identifies the patron's level in school. If the school library and graduation date have been entered, Alexandria will assign the level based on your preferences. If you enter a level and a school library, Alexandria will calculate the graduation date for you. Alexandria will advance patrons by one level after the last day of school if the level is set to either "*JK*" (*junior/kindergarten*), "*PS*" (*pre-school*), "*K*" (*kindergarten*), or "*1-12*". Patrons automatically graduate to the next grade level on the date you enter as the last day of school on the **Library Information** preference window. Graduated patrons are given the grade level of "**Graduated**".

### Graduation Date [Optional Date]

Enter the date that the patron will graduate.

## Account Information

### Birthdate

Enter the patron's date of birth. This information is used solely for reference.

### Account Exp

Enter the date that the patron's account expires. If you leave this field blank, the date will be calculated based on the expiration date based on the patron's policy when the patron record is first added to the system. For example, if a **Patron Policy** in **Preferences** is set for 365 days, the account will expire 365 days from the date the patron was entered.

## Patron Picture

This is the patron picture field; if you would like to add or change a patron's picture at this time, you can upload a GIF, BMP, PCT, PNG, JPG (or any other standard image file) using the **Browse for Patron Picture** selection from the primary **Actions** menu of **Patrons Management**; you can reset to the *default patron picture* by selecting **Remove Patron Picture**. Although they turn up elsewhere, patron pictures primarily appear in the **Current Patron** pane of **Circulation**.

## Status

This setting separates active patrons from those with special circumstances. Choose a status from the dropdown menu:

- **Active**. A patron whose status is set to **Active** can use the library (check *in* and *out*) according to the rules of the assigned patron **Policies**.
- **Lost Card** or **Suspended**. These statuses cause a warning message to appear when the patron barcode is entered in the **Circulation** module and require operator intervention in order to continue.
- **Transferred, Inactive, or Other**. These options are used mainly for generating reports for patrons with a statuses other than **Active**; for example, those who have transferred or are inactive. These statuses cause an alert message to appear on the **Circulation** module when the patron barcode is entered.

## Susp. End Date

If the patron **Status** is set to **Suspended**, the suspension will end on the date you enter in this field.

## Contact Contact

The **Contact** tab identifies contact information for the patron, including the parent or guardian you need to contact in case of emergency. You may enter more than one name, address, and email by separating them with a comma.

You can customize the name of the Additional Contact and Mobile fields in [Localization Preferences](#).

Personal	Contact	Access	Notes	Statistics
<b>Email</b>				
Primary Email		Other Emails 		
<input type="text" value="lcohen@dayrep.com"/>		<input type="text" value="example@example.edu,second@example.ed"/>		
<b>Phone</b>				
Primary Phone		Mobile	SMS	
<input type="text" value="947-0456"/>		<input type="text" value="585-8675"/>	<input type="text" value="xxx-xxx-xxxx"/>	
<b>More</b>				
Address		Parent/Guardian		
<input type="text" value="4609 Red Bud Lane"/>		<input type="text" value="Diane Cohen"/>		
<input type="text" value="Address 2"/>				
<input type="text" value="Salt Lake City"/>				
<input type="text" value="UT"/>	<input type="text" value="84121"/>			
<input type="text" value="Country"/>				
<b>Contact Notes</b>				
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>				

## Settings

### Additional Contact

Enter the name of the patron's parent or guardian. This information is used solely for reference.

### Phone and Mobile

Enter the phone number and fax number that will be used to notify the patron of special events, overdue items, and other official library business.

### Address, City, State, Postal Code, and Country

Enter the patron's mailing address. Notices and letters will be sent here.

### Primary Email

Enter the patron's primary email address. This is the email used for all email notifications (like overdue notices), matching with your SIS, and resetting passwords. To guarantee that email notifications are being sent, check the **Enable Automatic Email Notifications** box in your **Circulation Settings** preferences.



[Learn more about setting up email notices for patrons.](#)

### Other Emails

Enter additional emails (e.g. parent/guardian) and separate them by commas. This field is *only* used to keep track of additional emails, so these addresses won't receive notifications.

### Contact Notes

Use this field to enter notes on how to contact this patron or the patron's legal guardians. You can also use the **Contact Notes** field to track names, additional phone numbers (cell, home, work, or fax), and email addresses.

## Access

The **Access** tab contains a patron's Security Group and Site Access in addition to a patron's username and password.

Personal	Contact	Access	Notes	Statistics
<b>Login</b>		<b>Permissions</b>		
Username <input type="text" value="lcohen"/>		Security <input type="text" value="Patron (5)"/>		
Password <input type="text"/>		Librarian Site Access		
Confirm Password <input type="text"/>		<input type="checkbox"/> ALX - Alexandria Academy <input type="checkbox"/> COMP - COMPanion District Demo <input type="checkbox"/> EVE - Evelyn Elementary <input type="checkbox"/> MIA - Mia Middle School		
		<input type="button" value="Select All"/> <input type="button" value="Clear"/>		

### Security Group

This is the security level assigned to this patron or operator. The user's access level determines which operations they're allowed to perform. Security Groups can be created, removed, or adjusted in [Preferences > Security](#).

### Username

Enter a unique username for this patron. This username will be used to log in to Alexandria Librarian, Textbook Tracker, and Researcher.

### Password

This is where you create, confirm, and change the patron's password. If a password isn't set when the patron was created, the patron's default password is the their last name, without spaces or punctuation. For security reasons, passwords are never shown anywhere in Alexandria.



When set, patron passwords must meet the following requirements:

- **Weak:** At least 6 characters.
- **Regular:** At least 8 characters, including at least one letter (a-z) and one number (0-9).
- **Strong:** At least 10 characters, including at least one letter (a-z), one number (0-9), and one symbol (!@#%&\*~+=.,).

Passwords are not case sensitive.

## Confirm Password

Re-enter the patron's new password exactly as you entered it in the previous field. Don't forget to save your changes!

## Site Access

Check or uncheck the [sites](#) that this patron or operator is permitted to access.

# Notes

## Notes

The **Notes** tab can be used to include information about groups for which the patron belongs or general notes about the patron. If any notes are attached to a patron record, you can view them by clicking **Notes** at the bottom of the current patron pane of **Circulation**.

In Circulation Management, enter the **+** command to view notes for the current patron.

Personal	Contact	Access	Notes	Statistics
<b>General Notes</b>				
<input type="text" value="Lawrence 'Chunk' Cohen from The Goonies."/>				
<b>Alert Notes</b> ⓘ				
<input type="text"/>				
<b>Categories</b>				
<input type="text"/>				

## Settings

### Categories

Enter information about groups this patron belongs to. You can include notes about special reading programs, at-risk students, special education needs, gifted students, library contest students, or any other groups that you find useful. These category entries can be used to select patron records for reports.

### Alert Notes

This field is used to make the librarian aware of special circumstances regarding a patron.

For example, you can create an alert note so that you may "pass along" certain information to the patron the very next time they use the library. The alert message will automatically appear on the **Circulation** module when you enter the patron's barcode number.

### General Notes

This field can be used to attach additional comments about a patron. These comments can only be viewed from the **Circulation** module.

Click **Notes** at the bottom of the Current Patron pane in Circulation to view all the notes for this patron.

# Statistics

## Statistics

The Statistics tab contains historical information about your patron's recorded library usage. This data is automatically generated by Textbook Tracker and cannot be modified.

At the bottom of the window, click **Show History** to download a PDF of the patron's complete transaction history. This is the same as running a Patron History report.



Statistics are shown for both Library and Textbook data when applicable. Some statistics, such as **Last Use**, only apply for Library transactions.

Personal	Contact	Access	Notes	Statistics
Librarian	Textbooks			
<b>Status</b>		<b>Usage</b>		
↑ Items Out	7	Last Use	02/10/2	
↑ Items Overdue	0	Accession Date	12/03/2	
\$ Fines	\$0.00			
\$ Payments	\$0.00			
\$ Credits	\$0.00			
\$ Balance Due	\$0.00			