End-of-year tips: Managing patrons

May 9th, 2022

We have another tip for you to help you prep your library for summer break. The bulk of patron management work typically occurs at the beginning of the school year, but here's a few things you can do now to get a head start!

When it's time to update your patron records, review our Patron Imports Best Practices for info on importing, updating policies, and removing other patrons. If you don't update until the beginning of the year, consider setting yourself a reminder.

> ✓ Check out GG4L and Clever for easy patron management. Contact our Sales Team if you're interested in adding either to your library!

Remove Graduated Students

If you don't save old records in your system, here's how you can remove graduated students.

1. **Go to Tools > 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 want 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:
   - If you keep track of graduation dates in Patrons Tabs, enter the date range or relative date in the Graduation Date field.
   - If you use Last Grade in the Grade Table Preferences, enter the user-defined value for Last Grade in the *Patrons in Grade* field (usually "Graduated").
5. On the Options tab, choose if you want the patrons to be removed even if they have items checked out, or outstanding charges, and click **Run**.

Removes selected patron records from your database

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	Homeroom ▼	From 🔍 Through 🔍
→ Patrons in Grade	Graduated	Graduated
Accounts 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 📅 ▼
Patrons with Last Name		
Patrons in Barcode Range	From	Through
Patrons with Barcodes		

✓ **Show Additional Selections**   **Create Saved Utility**   **Run**

Need help with patron management, or anything else in Alexandria? Reach out to our stellar support team at support@goalexandria.com for assistance.

The Makeover betas are here! Look in Circulation, Items, and Patrons for a purple alert button ⚠ at the top of your screen. That will take you to the Makeover beta in our demo where you can play around recklessly.