

Patrons

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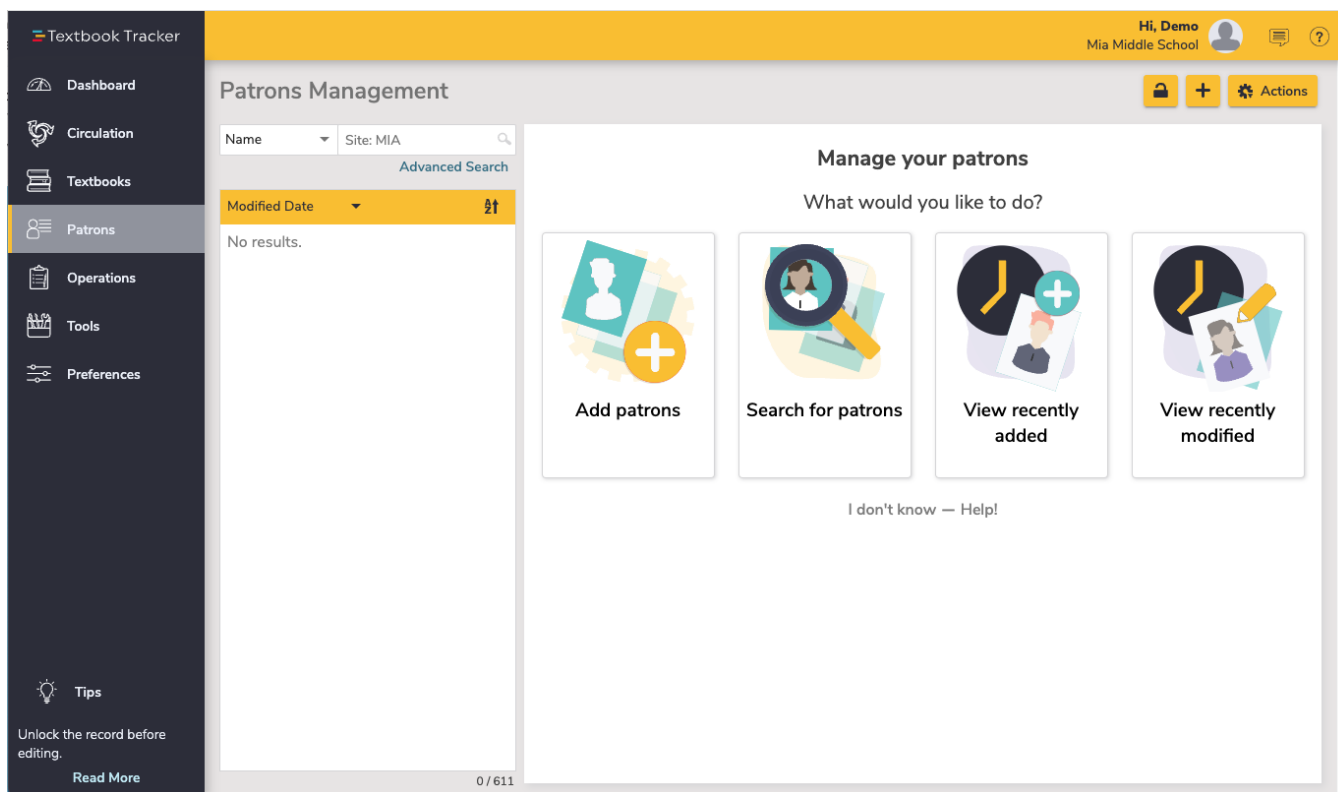
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Use Patrons Management to create, view, modify, and remove patron and operator record data.



Patrons Management includes a few important and distinct areas:

- The Patron toolbar on top,
- the Records List on the left,
- and the Current Record pane on the right.

Search for and open a patron record, then click the padlock at the top of the window to unlock the record for editing. The current record open in the Patrons module will also be the current patron in the Circulation module, and vice versa.

Add Patrons

When unlocked, select the plus in the top right to add patrons, or if no record is currently pulled up, you can select the Add patrons card on the Patrons landing page.

Actions Menu

- **Remove Patron.** This selection *permanently* removes the selected patron or operator record. Be sure to address any items checked out or fines owed before removing the patron.
- **Merge duplicate by barcode.** Merges the current patron record with another that's specified by barcode. All lists, reviews, charges, checkouts, holds, history, and more from both records will be kept.
- **Take a picture.** Opens a window so you can take a picture of the patron if your device has a webcam.
- **Add a picture.** This selection opens an operating system standard explorer window, allowing you to guide Alexandria to the location of your saved patron image. You can use GIFs, BMPs, PICs, JPGs (or most standard image files) as viable formats to add a picture to your patron record. When applicable, the picture will appear in the Personal Info tab of Patrons Management and in the Current Patron pane of Circulation.
- **Remove picture.** Once removed, the patron picture will default to what you have set in Preferences > Patrons > Patron Pictures.
- **Patron History.** Runs an individual *Patron History* report, which shows recent payments, credits, renewals, lost items, refunds, Lexile history, and returned items. The PDF will automatically download to your device. You can also run this report in Circulation via the actions menu for the Current Patron pane.
- **Patron Details.** View or print the details for the current patron.

Patrons Management

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

🔒

+

⚙️ Actions

Name

m

Advanced Search

Modified Date

7/31/2023

⬆️

7/31/2023

Jairam Matthews

7/31/2023

Tamra Motz

7/31/2023

Wesley Mathews

7/31/2023

Meryl Chism

7/31/2023

Cody Moore

7/31/2023

Madeline Luke

7/31/2023

Nicholas Mattson

7/31/2023

Brody Marshall

7/31/2023

Maxwell Dixon

7/31/2023

Danielle Milton

7/31/2023

Mishayla Lewis

7/31/2023

Heather Massey

7/31/2023

Jamie Manley

7/31/2023

Meagan Truesdell

32 / 611

First | Middle | Last Name *

Jairam

Matthews

Barcode *

2011

Site

MIA - Mia Middle School

OUT

7

LAST USE

02/10/2015

BALANCE

\$0.00

CREDITS

\$0.00

Personal

Contact

Access

Notes

Statistics

Identifiers

Student #

1211

Birth Date

mm/dd/yyyy

Sex

Male

SSN

Nickname

Locators

Homeroom *

Artman

2nd Location *

Kunzler

Grade *

06

Dates

Graduation Date

mm/dd/yyyy

Account Expiration

1/1/2100

Suspension End

mm/dd/yyyy

RSN 23

GUID 5b7a353c-9eee-4bd8-b17c-0512596f554e

Last modified by System Administrator on 07/31/2023 at 12:06 AM

See [Patron Tabs](#) for more information about the Patron records.

Managing Patrons


Managing Patrons

Adding patron records to Textbook Tracker is easy! You can either add records manually (see steps below) or import hundreds of records at once.

Operators (Library Administrator, Librarian, Student Aide, etc.) are still considered patrons. Their records are created and managed in **Patrons Management**, and the **Security Group** field is what determines their program access. See [Adding Operators](#) for more information.

Step-by-Step Instructions

Add Patron Record

1. Log in to **Patrons Management**.
2. Click the Lock icon, then select the **Add Patron** button  in the top right corner.
3. A new record will appear to the right. Each field will be blank except for a few preset defaults. These defaults can be changed in the **Patron Defaults** tab of **Patron Preferences**.
4. Move between the **Patrons Tabs** to enter information, configure options, and make changes to the patron record as needed.
 - a. At the very least, **Last Name**, **Barcode**, and a **Security Group** are required to save your new patron. However, we suggest you also provide a unique **Username**, **Password**, and **Email** address during the creation of your patron.
5. Next, if you intend to give your new patron any operator privileges (e.g. Librarian or Student Aide), select the correct **Security Group** from the drop-down menu. You will also need to use the **Site Access** selection to mark the sites that your patron is permitted to access. Otherwise, leave these selections alone.
6. Click **Save** to add your new patron record or **Revert** to discard it.

While filling out a patron record, you can **<tab>** to move to the next field, or **<shift-tab>** to move to the previous field.

Additional Information


Username and Passwords

- Usernames must be unique. If the username you've selected is already in use, Alexandria will ask you to choose another.
- A patron's default password is their last name.
- Passwords are *not* case-sensitive.
- Patrons are saved to the database by username *and* barcode, so they can have duplicate first/last names and security groups.

Other

- Textbook Tracker automatically assigns a barcode number based on the value you've provided in the **Next Barcode** field of the **Patron Defaults** preferences.
- We suggest administering a user-defined **Policy** and **Status**. Assigning the correct patron policy is important when certain patron groups need to stand apart in statistical reporting.
- You can quickly [import](#) hundreds of patrons if you have their data in a tab-delimited format.


Editing Patrons

You can edit patron information directly from **Patrons Management**. Before records can be changed, they must be unlocked by clicking on the **Lock** button .

This method for modifying information is best when editing an individual patron record. If you want to modify information for a group of patrons, use [Patron Utilities](#).

Step-by-Step Instructions

Modify Patron Records

1. Log in to **Patrons Management**.
2. Use quick search or Advanced Search to look up a patron.
3. Enter information about the patron (e.g. **Last Name**, **Barcode**, etc.) and press <return> or <enter>.
4. Select the patron you'd like to modify.
5. Unlock the patron's record by clicking the **Lock** button .
6. Now you may move between the [Patron Tabs](#), making changes to the patron record as needed.
 - a. Keyboard: To move to the next blank data entry field, press the <tab> key. To move to the previous blank data entry field, press <shift-tab> or <-tab>. To select a particular data entry field to edit, click in the field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.
7. If needed, use the **Password** and **Confirm Password** fields to change the patron's password. You can make passwords more secure by mixing different types of characters, numbers, and even special characters such as "&" or "%". Alexandria passwords are not case sensitive, so using upper and lower case letters is unnecessary.
8. Once you have modified all the necessary information for this patron, click the **Save** button in the upper-right corner. If you want to ignore the information you have entered, click the **Revert** button. You won't be able to select another patron record until you **Revert** or **Save** your changes.
9. If you try to save a patron record with a **Username** or **Barcode** that is already in use (e.g., eanderson or 1001), an error message will appear, prohibiting the change.

Adding Operators

Operators are patrons with permissions to access the management side of Textbook Tracker. Their records are created and managed in **Patrons Management** just like regular patrons. Program access is determined by a patron's Security Group, which is designated on the [Access](#) tab of a patron record.

Security Groups

Security Groups determine what actions operators or patrons are permitted to perform. By default, newly created patrons are assigned to the Patron (5) Security Group. This level doesn't allow any access to the Librarian side of the program. Change their Security Group by editing the [Access](#) tab of their patron record.

To determine the specific permissions each Security Group has, go to [Security](#). By default, Administrator-level access (1) are the only security groups that allow you to make modifications.

All Operators

- Any operator with access to Preferences will only be able to modify Security Groups below their own. For example, an operator with Librarian-level security access (2) can modify preferences; however, they are unable to change the Librarian, Library Administrator, or District Administrator Security Groups.

- Most patrons won't need to have their **Site Access** indicated. However, if you intend to give your new patron any sort of operator or library management privileges (e.g. Student Aide or Librarian), use the **Librarian Site Access** selection on the [Access](#) tab to mark the sites that your patron is permitted to access.
- When creating a new patron with security equal or greater than Library Aide, the patron's assigned site is automatically added to their **Site Access** list when the record is saved, if it has not already been added.
- When creating operator accounts, remember to add usernames and [secure passwords](#). We also strongly recommend each operator has an email that can be used to reset their password.
- We recommend that each operator have their own account. Sharing an account is a security and privacy risk, and you might find yourself locked out if someone else deletes that account! (A potential exception to this is for [Student Aides/Self-Service](#).)
- **High level operators are required to enter an email, and we strongly recommend that every user enter a valid email.** See [Password Management Best Practices](#) for more information.

District Administrators

- Your first operator must be a District Administrator with equivalent Security Group access. If you're brand new to Textbook Tracker, you'll be prompted to create a District Administrator account the first time you access the program. However, if you're coming from a previous version of Textbook Tracker, you can log in with your old account.
- The District Administrator security group is only meaningful for Centralized Catalog, multi-library collection licenses; for all other licenses, the District Administrator security group is analogous to the Library Administrator.
- The District Administrator security group has full access to all areas of the program. For that reason, it can't be modified or deleted.
- Remember that only District Administrators can make other patrons District Administrators. If you get a new District Administrator but forgot to have the existing one grant those permissions before they left, contact our Support team at 1-800-347-4942. They will confirm the new District Administrator's identity and grant those permissions.
- To avoid losing access to Textbook Tracker, be sure all administrators have an email that can be used to reset their password.

Patron Search

Patron Search

Go to **Patrons** and click into the **search** box. The basic search allows you to narrow results by Name, Barcode, Homeroom, Recently Modified, and Recently Created. Basic searches only apply to the site you are logged into.

Advanced Search

For more specific, narrowed searches, use any of the Advanced Search options, including Basics, Access, Dates, Contact, and More.

Select the **Combine with current results** box to add your new search to any existing search results.

ACCESS ^

Policy

Any ▾

Security

Any ▾

Status

Any ▾

Username

CONTACT ^

Email No Email

example@example.edu

Phone No Phone #

3000-3000-3000

SMS No SMS

3000-3000-3000

Parent/Guardian

Address

Advanced Search

X

BASICS

^

First Name

Last Name

Barcode

From

-

To

Site

MIA | Mia Middle School

Grade *

From

-

To

Homeroom

2nd Location

Type or choose from list

ACCESS

DATES

CONTACT

MORE

☐ Combine with current results

CLEAR

SEARCH

DATES

^

Patron Added

From

-

To

Birth Date

From

-

To

Expiration

Expired

From

-

To

Graduation Date

From

-

To

Suspension End

From

-

To

MORE

^

Lexile

From

-

To

Reading Level

From

-

To

Student #

SSN

From

-

To

Notes

☐ No Picture

☐ Combine with current results

CLEAR

SEARCH

Only Show Operators in the Patron Records List

There are times you may need to search for Operators only. Use the Policy and Security dropdowns under Access in **Advanced Search**.