Patrons Preferences

Preferences

- Patrons
- Items
- Circulation
- Codes
- Circulation Groups
- Z39.50
- Sounds
- Setup
- Services
- SIS Integration
- Advanced Bookings

How helpful was this page?

Unknown macro: 'rate'

Tell us what we can improve.

Related Blog Posts

Blog Posts

- Blog: Winter storms–recompute due dates created by Bethany Brown Jan 23, 2024 Alexandria
- Blog: Cleaning up the grade table–Authority Control created by Bethany Brown Apr 26, 2023 Alexandria
- Blog: Make a calendar just for the senior class! created by Bethany Brown Aug 02, 2022 Alexandria
- Blog: When does an overdue item become lost? created by Bethany Brown Mar 15, 2022 Alexandria
- Blog: Setting rules–Patron Policy Preferences created by Bethany Brown Mar 08, 2022 Alexandria
- Blog: Seeing double (barcodes) on patrons and items? created by Bethany Brown Feb 23, 2022 Alexandria
- Blog: Automatic email notices... What are you waiting for? created by Bethany Brown Nov 17, 2021 Alexandria
- Blog: Winter (break) is coming! Are your period due dates set? created by Bethany Brown Oct 20, 2021 Alexandria

- Blog: [Unused Barcodes: Reporting for Duty](#) created by [Bethany Brown](#) Sep 15, 2021 [Alexandria](#)
- Blog: [Introducing... FAQs!](#) created by [Morgan](#) Jul 07, 2021 [Alexandria](#)

[Save as PDF](#)

ⓘ this page has been moved to https://support.goalexandria.com/preferences/patrons-preferences/
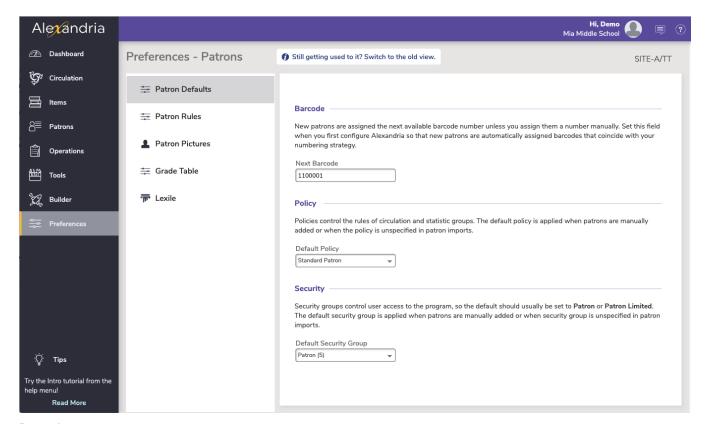
Use these preferences to configure some of the default settings applied to new patrons when they are added to Alexandria.

⇄ **Patron Defaults**

⇄ Patron Rules

👤 Patron Pictures

⇄ Grade Table

🏛 Lexile

Click the tabs below to expand for more information.

Patron Defaults
Patron Defaults

Preferences - Patrons

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

- Patron Defaults
- Patron Rules
- Patron Pictures
- Grade Table
- Lexile

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)

Barcode

- **Next Barcode.** New patrons are assigned the next available barcode number, unless you assign them a number manually. Setting this field when you first configure Alexandria will ensure new patrons are assigned barcodes that coincide with your numbering strategy. The code will increment automatically as new users are created.
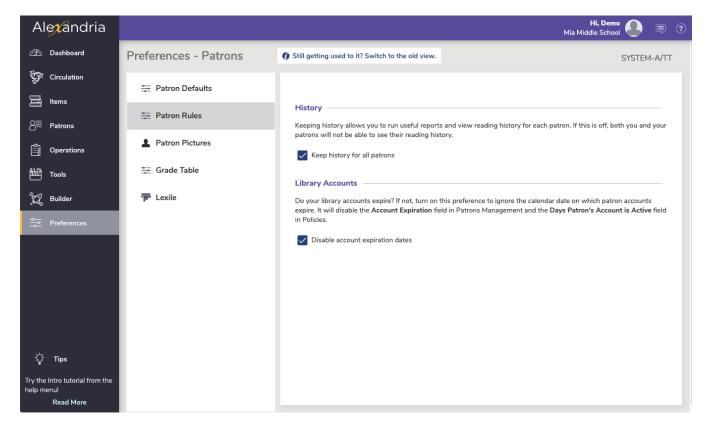
Policy

- **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 Policy page 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 Security section in Tools for more information about assigning (and removing) access levels for patrons and operators.

Patron Rules

Patron Rules

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. This includes the reading history that patrons can see by logging in to Status.
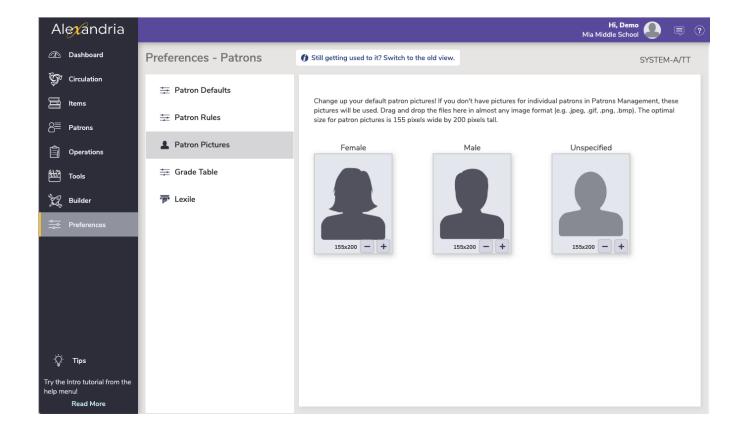
Library Accounts

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

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.

Alexandria

Hi, Demo
Mia Middle School

- Dashboard
- Circulation
- Items
- Patrons
- Operations
- Tools
- Builder
- Preferences

Tips

Try the Intro tutorial from the help menu!

Read More

Preferences - Patrons

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

- Patron Defaults
- Patron Rules
- **Patron Pictures**
- Grade Table
- Lexile

Change up your default patron pictures! If you don't have pictures for individual patrons in Patrons Management, these pictures will be used. Drag and drop the files here in almost any image format (e.g. .jpeg, .gif, .png, .bmp). The optimal size for patron pictures is 155 pixels wide by 200 pixels tall.

Female | Male | Unspecified

155x200 − + | 155x200 − + | 155x200 − +

Grade Table
Grade Table Preferences

Grades (or, "Levels") in Alexandria can be used to search and sort patrons, run reports and utilities by specific grades, and more.
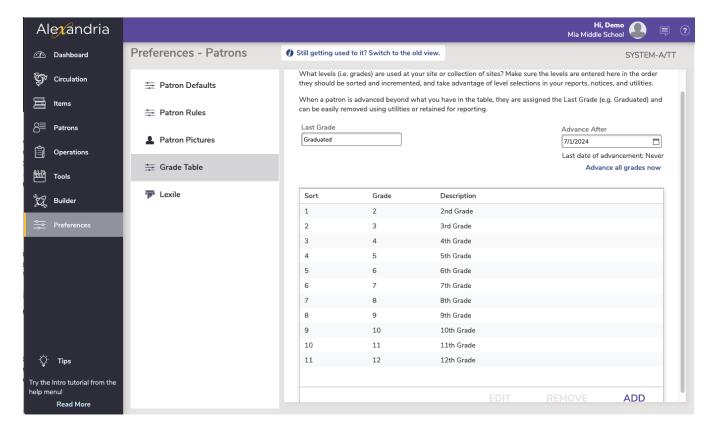
✓ Note that the *Grade Table* is where you keep all *official* grades. Patrons can still be imported/added with other grade terms (e.g. "2nd Grade" instead of "2"), and you'll want to periodically review Authority Control to clean up the grades.

Here in the Grade Table, enter the grade levels relevant to your district in the order they should be sorted and incremented. 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 now** button or the Advance Patron Grade 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.

✓ Users often set up their Policies to match Grades—remember to update your patrons' policies when you advance grades!

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

The Advance After is the date (set manually) after which grades will be automatically advanced.

To avoid automatically advancing grades, set the date to a year in the past.

Beneath you can see when the latest Advance All Grades operation was performed on the account. You can also click on "Advance all grades now" to pull up a dialog that will allow you to choose which sites are advancing.

Advance all grades now

Click this to add one grade level to each of your patrons that already has a grade level (from the grade table). Any patron of the last level in your table will then advance to the 'last grade' value as described above. For example, a patron with the grade level of 6 will advance to 7. Patrons whose grade/level is either not found or not defined in the Grade Table will not have their grade level advanced.

> ⓘ **Advance All Grades Troubleshooting**
>
> For the Advance All Grades utility to work, grades in the Grade Table need to exactly match the Grade field entry in Patron Management records. Examples include:
>
> Patron record grades padded with "0"s.
> A grade field using "5th" when "5" is the standard defined in the Grade Table preferences.
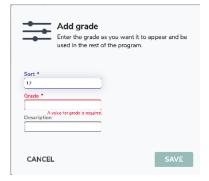
Add a New Grade Level

1. Click **Add** to add a new level to the grade table. In the dialog, enter the following information:
    a. **Sort.** Enter the sort order for the grade.
        - The sort value you provide changes where the grade appears in the Grade Table and how grades are advanced.
        - For example, if the earliest grade level you support is kindergarten, then "1" should be your Kindergarten Sort value. If, at a future date, you incorporate a new preschool level and that becomes your new "1", then your Kindergarten Sort value will be automatically bumped to "2".
    b. **Grade.** Enter a simple grade name.
        - This title will be added to the Grade drop-down menu in Patrons Management, Patron Details, Patron Reports, etc.
    c. **Description.** This is a more common or explanatory version of the grade name.
        - For example, your description for grade "7" could be "7th Grade".
2. Click Save to close the dialog.
3. Finally, click Save to keep your new grade level or Revert to discard it.

Edit a Grade Level

1. Select the grade you would like to modify and click **Edit**.
2. In the dialog, edit information in the Sort, Grade, and Description fields. If you modify the Sort order, the grades in the table will be adjusted automatically.
3. When you're finished making changes, click **Save** to close the dialog.
4. Finally, click Save to keep your changes or Revert to discard them.

Remove a Grade Level

1. Select the grade and click **Remove**.
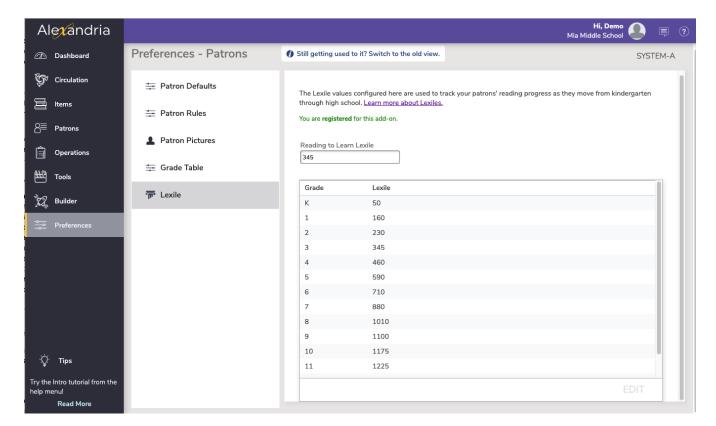2. When you are finished, click Save to keep your changes or Revert to discard them.

Add grade
Enter the grade as you want it to appear and be used in the rest of the program.

Sort *
17
Grade *
A value for grade is required.
Description

CANCEL   SAVE

Edit grade
Enter the grade as you want it to appear and be used in the rest of the program.

Sort *
11
Grade *
12
Description
12th Grade

CANCEL   SAVE

Lexile
Patron Lexile Preferences

Lexile values are used to track your patron's reading progress as they move from kindergarten through high school. For more information on the importance and increasing performance of lexile scoring, Learn more about patron Lexiles.

Settings

- **Reading to Learn Lexile.** The lexile value at which a patron has moved from Learning to Read to Reading to Learn. The transition from Learning to Read to Reading to Learn usually occurs between the third and fourth grade; therefore, the default Reading to Learn Lexile value is commonly set somewhere between 345 and 460. This value shows on the patron Lexile graph.