Patrons

PATRONS

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

To log in directly, add /patrons to the end of your Alexandria URL.

Content

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This page has been moved over to https://support.goalexandria.com/patrons/

Patrons

- Patrons Tabs
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- Adding Operators

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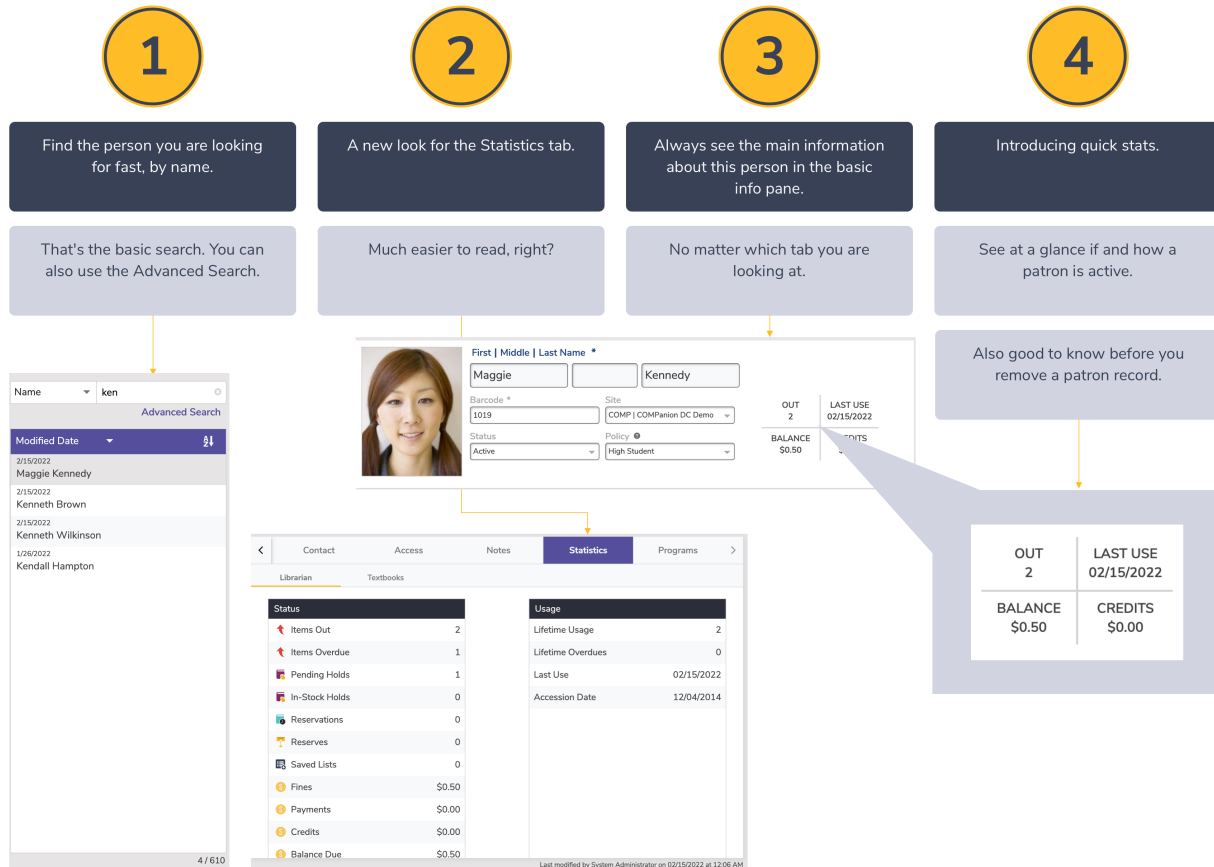- Patron Field Mapping
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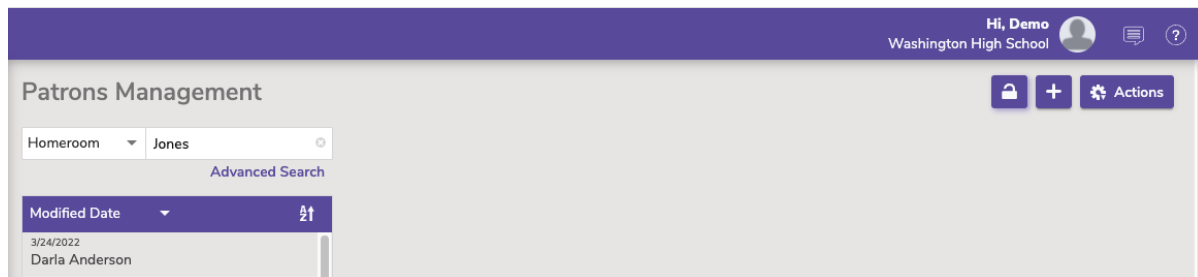- Patrons Preferences
- Import Patrons
- Import Patron Pictures

- Patron Imports Best Practices
- Patron Policies

4 Big Makeover Changes - Patrons

1

Find the person you are looking for fast, by name.

That's the basic search. You can also use the Advanced Search.

2

A new look for the Statistics tab.

Much easier to read, right?

3

Always see the main information about this person in the basic info pane.

No matter which tab you are looking at.

4

Introducing quick stats.

See at a glance if and how a patron is active.

Also good to know before you remove a patron record.

Additional Changes to Patrons

Record Selection

You can select multiple records at once using the **<ctrl>** (Windows) or **<cmd>** (Mac) key to quickly export, merge, or remove records, or remove patron pictures. Make sure to unlock the Patrons Management first in the top right of the screen.

Multiple records selected

You've selected 3 records. What would you like to do?

Export records

Merge records

Remove records
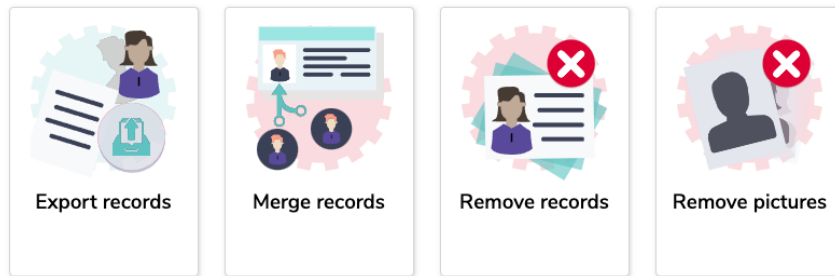
Remove pictures

Oops! Clear all selections.

Picture Controls

Hover over patron pictures to select buttons to easily change, remove, or add new patron pictures. (These options are also still available in the action menu.)

Modifications

You can view the modification history of a patron record, to see when changes were made, and who made them. Access the modification history in the bottom right corner of the patron record by clicking on the current modification information.

Modification History
Run on 03/24/2022 4:38 PM for 1001 - Anderson, Darla.

Date/Time	Patron name
03/24/2022 12:07 AM	System Administrator
01/26/2022 3:18 PM	System Administrator
10/26/2021 1:19 PM	System Administrator
07/21/2021 9:36 AM	System Administrator
04/27/2021 1:37 PM	System Administrator

CLOSE

See our Alexandria Makeover page for more information about the changes and improvements!

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

Navigation

Patrons Management includes a few important and distinct areas:

- Patron controls on top, which includes the Actions Menu.
- Records List on the left.
- The No Results pane or Current Record pane on the right.

Search for and click on a patron, then click the padlock icon to unlock the record for editing. If you are switching between Patrons and Circulation, the current record in one will become the current record in the other.

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. See Managing Patrons for more information.

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.

There are times you may need to remove patrons who no longer use your library or operators who are no longer authorized to access the Alexandria. Use **Remove Patron** to permanently remove the current patron or operator and ensure the security of your site(s).

When a record is removed, all associated information is also removed. For example, removing a patron also removes all history and statistics and any holds or reservations that the patron had pending. To remove a patron with items checked out, be sure to have them return all items to the library or record them as Lost.

How to Remove Patrons

1. Log into Patrons by adding **/patrons** to the end of your Alexandria login URL.
2. Locate the patron you wish to remove.
3. Select (highlight) the patron you'd like to remove from the **Records List** of results on the left.
4. From the **Actions** drop-down menu, select **Remove patron**.
5. You will be asked if you're sure you'd like to permanently remove the selected patron; click **Remove** to delete the record or **Cancel** to keep them in your database.
6. Patrons should not be removed if they still have items checked out. If a patron owes any fines or charges, you can still remove them, but their fines will be cleared from the system.

⊘ Removing a record is permanent and **cannot** be undone without manually re-entering their information or recovering the information from one of your database archives.

- **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.

Merging Rules

The "keep" record is one you want to keep, and the "merge" record is the one you want to copy data from and delete.

If a field is blank in the "keep" patron record but filled in the "merge record", the final record will use what's in the "merge" record's field:

"Keep" Record	"Merge" Record	Final Record
	Griffith	Griffith

If the same field is filled in both the "keep" and "merge" records, the final record will use what's in the "keep" record's field:

"Keep" Record	"Merge" Record	Final Record
Dibbs	Griffith	Dibbs

All General, Category, Contact, and Alert Notes on the "merge" patron record will append to notes on the "keep" patron record:

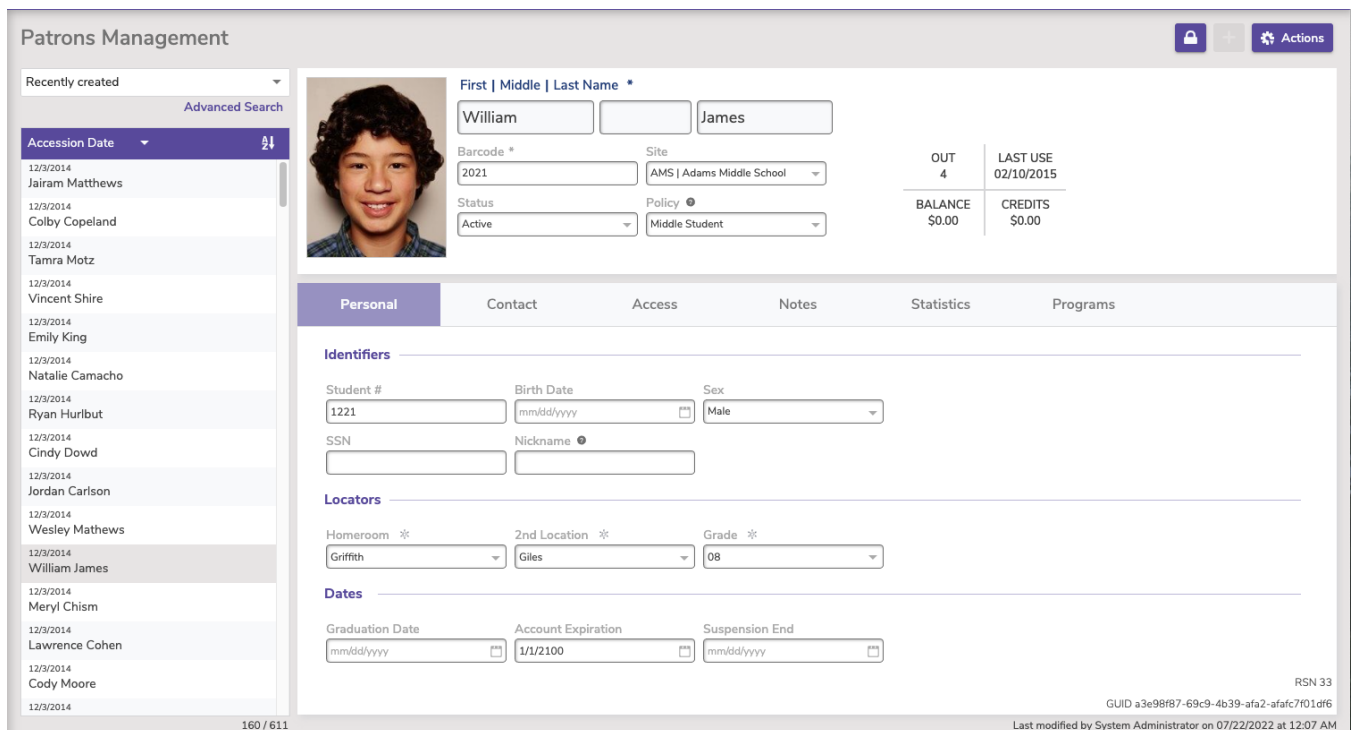| "Keep" Record	"Merge" Record	Final Record
Needs to meet with librarian	Mrs. Apple's book club	Needs to meet with librarian Mrs. Apple's book club

How to Merge Patron Records

⊘

> ⊘ Merging records is permanent and cannot be undone without recovering the information from one of your database archives.

1. Log into Patrons by adding /patrons to the end of your login URL.
2. Locate the patron record you wish to keep ("keep" record).
3. Select (highlight) the "keep" record from the **Records List** of results on the left.
4. Make sure the patron record is 🔓 unlocked.
5. From the **Actions** drop-down menu, select **Merge duplicate by barcode**.
6. In the **Merge Records** dialog, type the barcode of the patron you'd like to merge with the current patron ("merge" record). The barcode must consist of 3+ numbers. Click **Continue**.
7. A confirmation dialog will appear. Review the details of the merge, and if everything looks correct, click **Merge**.
8. The "merge" record will be deleted, and all data will be transferred to the "keep" record.

- **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.

See Patrons Tabs for more information about the Patron records.

Navigation

The **Patrons Management** module includes a few important and distinct areas:

- Patron controls on top, which includes the Actions Menu and Message Center.
- Records List on the left
- The No Results Pane or Current Record pane on the right.

Search for and open a patron, then click the padlock icon 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.

Hover over or click on the items on the image below for more information.

Circulation

Full Name ▾

- Amstead, Lonnie Ann
- **Anderson, Darla**
- Arches, Sunny Ralph
- Arias, Mark
- Arnold, Camille
- Barrera, Kiyan
- Base, Ann
- Bates, Lenny
- Bell, Brooke
- Benton, Danielle
- Bergerac, Joshua
- Betters, Julie
- Biernbaum, Cassandra
- Blackwolf, Spencer
- Bodine, Max
- Boehm, James
- Boehm, Michael
- Bonham, Jason E
- Bornfleth, Beth
- Bowling, Haley
- Boxer, Jonathan
- Boyle, Molly
- Boyles, Jeff

+ 🗎 🔍

Items
Patrons
Tools
Researcher

Personal Info | Contact Info | Notes | Statistics | Lexile

First Name: Darla

Middle Name:

Last Name: Anderson

Barcode: 1001

Policy: High Student

Sex: Female

Site: COMP - COMPanio...

Homeroom: Jones

2nd Location: Dibb

Student #: 1001

SSN:

Reading Level: 10.9

Grade: 11

Birthdate: mm/dd/yyyy

Graduation Date: mm/dd/yyyy

Card Exp Date: disabled

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Status: Active

Susp. End Date: mm/dd/yyyy

Security Group: Patron (5)

Username: danderson

Password:

Confirm Password:

Email: danderson@dayrep.com

Site Access