

Managing Patrons

Patrons

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Unknown macro: 'rate'

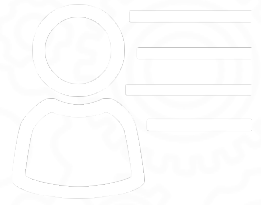
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This page has been moved over to <https://support.goalexandria.com/patrons/managing-patrons/>

Adding Patrons

Adding patron records to Alexandria 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.



(155x200)

First | Middle | Last Name *

Barcode ***Site**

Status**Policy ⓘ**

< **Personal** Contact Access Notes Statistics >

Identifiers

Student #**Birth Date****Sex**

SSN**Nickname ⓘ**

Locators

Homeroom ***2nd Location *****Grade ***

Dates

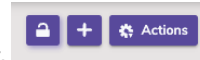
Graduation Date**Account Expiration****Suspension End**


Step-by-Step Instructions

Add Patron Record

1. Log in to **Patrons Management**.

Managing Patrons



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**.
Last Updated: `time($content.getLastModificationDate())`
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


Usernames 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

- Alexandria 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 **Patrons 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.

Add Patron Record

Adding patron records to Alexandria 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.

Personal Info	Contact Info	Notes	Statistics	Lexile
First Name	Mark		183	
Middle Name				
Last Name	Arias			
Barcode	1002			
Policy	High Student			
Sex	Male			
Site	COMP - COMPanio...			
Homeroom	Jones	Status	Active	
2nd Location	Dibb	Susp. End Date	mm/dd/yyyy 13	
Student #	1002	Security Group	Patron (5)	
SSN		Username	marias	
Reading Level	11.3	Password		
Grade	11	Confirm Password		
Birthdate	mm/dd/yyyy 13	Email	marias@dayrep.com	
Graduation Date	mm/dd/yyyy 13			
Card Exp Date	disabled			

Site Access

Step-by-Step Instructions

Add Patron Record

1. Log in to the **Patrons Management** module.
2. Click the **Add Patron** button  located near the bottom of the **Records List** pane.
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 [Personal Info](#), [Contact Info](#), and [Notes](#) 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, click <tab> to move to the next blank data entry field, or press <shift-tab> to move to the previous blank data entry field.

Additional Information


Username and Passwords

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- You can quickly [import](#) hundreds of patrons if you have their data in a tab-delimited format.



Modify Patron Record

You can edit patron information directly from the **Patrons Management** module. 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 the appropriate [Patron Utilities](#).

Step-by-Step Instructions

Modify Patron Records

1. [Log in](#) to the **Patrons Management** module.
2. In the bottom left corner, click on the **Find** icon  to pull up the **Patron Lookup** dialog.
3. Enter qualifying information about the patron (e.g. **Last Name**, **Barcode**, etc.) and click **Search** (or press `<enter>`).
4. If results—multiple or exact—are located for your search, the **Records List** pane (on the left) will be populated with the patron record(s) that most closely match your criteria.
5. Select (highlight) the patron you'd like to modify.
6. Unlock the patron's record by clicking the **Lock** button .
7. Now you may move between the [Personal Info](#), [Contact Info](#), [Notes](#), [Statistics](#), and [Lexile](#) tabs, making changes to the patron record as needed. 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.
8. 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; use some uppercase letters along with lowercase letters, numbers, and even special characters such as "&" or "%".
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