Patrons Tabs

Patrons

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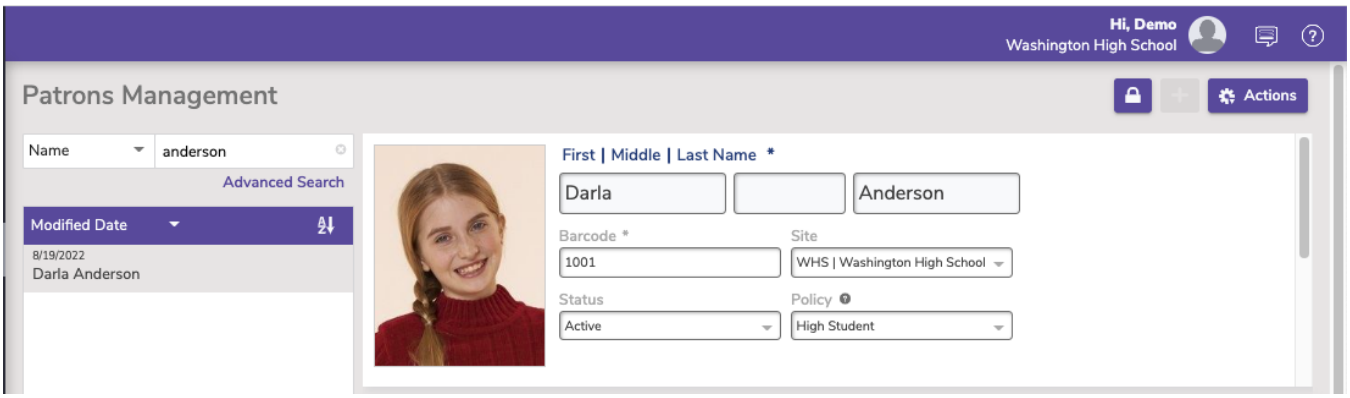
Patrons Tabs

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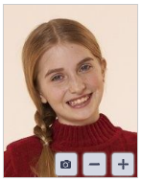
This page has been moved over to https://support.goalexandria.com/patrons/patrons-tabs/

The right side of Patrons Management shows the current Patron record, which displays the patron picture, First, Middle, and Last Name, Barcode, Site, Status, and Policy. To the left of the current record is the records list (based on what you searched).

To make changes to the Patron record, unlock the record in the top right corner.



Patron Picture

	Hover over the picture to access the buttons to take a patron picture using a connected webcam, **-** to remove, or **+** to upload a new picture.

Name

First, Middle, and Last Name fields. Last name is a required field.

Barcode

Each patron and operator is assigned a unique barcode up to 15 characters long, based on the value set in Preferences > Patrons. You can change the assigned barcode here. Barcode is a required field. Learn more in Barcode Your Collection.

Site

Use this dropdown menu to choose the site or school that your patron attends. A list of valid and available sites will always be pulled from the data in your Sites Management. To ensure the accuracy of reports, be *consistent* when selecting this information. Reports can be generated and sorted by this field. For example, you may print an overdue list for all the students of a particular school.

Status

Use this dropdown menu to change the status of the current patron.

- **Active.** These patrons can use the library (check in and out) according to the rules of their assigned patron policies.
- **Card Lost** or **Suspended**. These statuses cause a warning message to appear when the patron barcode is entered in Circulation and require operator intervention in order to continue. See Patron Policies > Overdue for more information on suspending patrons.

- **Transferred**, **Inactive**, or **Other**. These options are used mainly for generating reports for patrons with a statuses other than **Active**; for example, those who have been removed via one of your SIS integrations will be assigned a status of 'transferred'. These statuses cause an alert message to appear on the Circulation module when the patron barcode is entered. In ambiguous situations a patron note will be helpful as long as the patron's privacy is kept in mind.

Policy

The policy that you assign to a patron or operator determines the library rules for their account. To choose a policy for a patron, click the **Policy** drop-down menu and select a value. The default policy for new patrons or operators is automatically assigned based upon your **Default Policy** setting in the **Patron Defaults** preferences. See Policy Preferences.

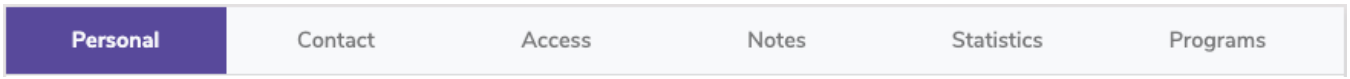
Records List

The left-hand side of the module contains the **Patron Records List** pane, where all patron and operator records matching your search criteria will be displayed in the sort order set at the top of the list.

Selecting a patron from the list will make that patron record current on the right.

The area situated above the record list contains tools that useful for adding, browsing, and finding *patron* or *operator* records.

- **Quick Search**. Which patrons do you want to view? Click here for a few simple, predefined search options.
  - Most Recently Modified
  - Most Recently Created
  - Name
  - Barcode
  - Homeroom
- **Advanced Search**. Click to open the Advanced Search.



Click the tabs below to expand for more information about the Patrons tabs.

> ⚠ 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.

The greater half of the **Patrons Management** module is dedicated to the **Current Patron Record** pane, which provides access to the information stored in the title or copy record selected from the patrons **Records List** on the left. The tabs that are available in the **Current Record** pane contain the settings, options, editable fields, drop-down menus, and checkboxes that are used to manage the patrons or operators who use your library.



Patrons Management tabs

The **Patrons Management** tabs contain pertinent information for each patron.

- Personal
- Contact
- Access
- Notes
- Statistics
- Programs

You may notice a peculiar number to the right of the **Programs** tab. This is the patron **Sequence Number**, a unique number that Alexandria assigns to new patrons or operators. This number is useful when browsing patrons by order of entry.

Records List

The left-hand side of the module contains the **Patron Records List** pane, where all patron and operator records matching your **Find** criteria will be displayed in the user-specified **List** sort order. The **Patron Records List** also contains shortcuts where you can **Add** patron or operator records to your database.

If there is no patron in the **Current Patron** pane of the **Circulation** module when the **Patrons Management** module is accessed, the default selection will be the *first* of your **Most Recently Modified** patrons.

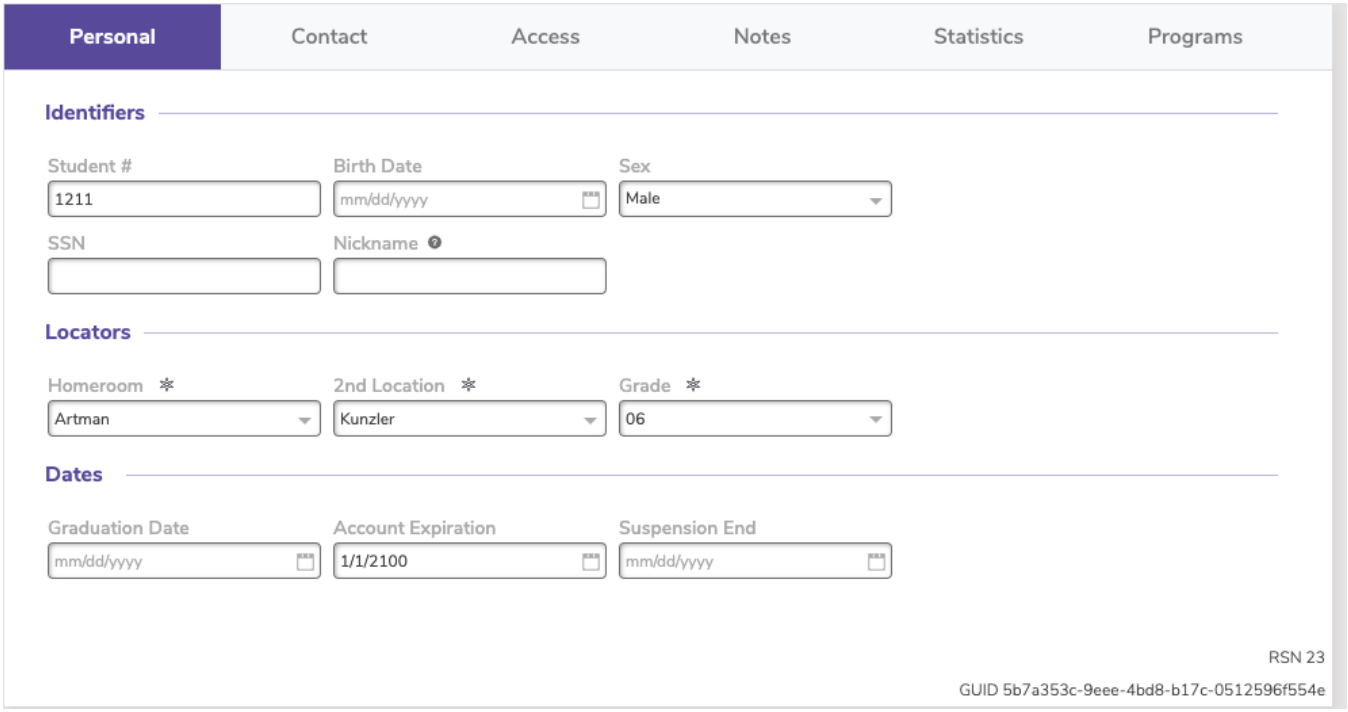
Selecting a patron from the **Patron Records List** will make that patron or operator record current in the **Current Record** pane (i.e. the larger, right-hand section of the **Patrons Management** module).

The area situated below the record list contains tools that useful for adding, browsing, and finding *patron* or *operator* records

- **Add**. Click to add a new patron or operator record to your database.
- **Quick Search**. Which patrons do you want to view? Click here for a few simple, predefined search options.
  - Most Recently Modified
  - Most Recently Created
- **Find**. Click to open the **Patron Lookup** dialog.

Personal

Personal



Student

The community ID is designed to be used as an additional local for your local ID. This could be a student code, phone number, parcel number or any other unique identification code. You are allowed to customize the name of this [***Community ID***] field in the **Terminology** preferences.

Birth Date

Enter the patron's birth date. This information is used solely for reference.

Sex

Use this drop-down menu to help identify the sex of this patron; **Male**, **Female**, or **Unspecified**. The default is Unspecified. (If you need to make a more specific note, use one of the Notes fields.)

SSN

In the United States, the “government ID” is typically the social security number (*SSN*); other countries may use other formats. The name of this [Government ID] field can be customized in **Preferences > Setup > Terminology**.

> **A Note About Community and Government ID**
>
> These are alternate, unique ID codes you may want to use with Alexandria. If you plan on updating patron information automatically from a central administration system (or you want to locate patrons by alternative codes,) enter data in these fields. Duplicate values are *not* allowe d; if a duplicate code is entered, Alexandria will give you an error message, notifying you that you need to make your code unique.

Nickname

Enter the patron's nickname if they have one. This could be a shortened version of their first name or an entirely different name they prefer to go by. It will be displayed in parentheses after their first name in both Patrons Management and the Circulation Current Patron pane, and can be used to look up a patron record. Also, a patron's nickname will be used in place of their first name in Researcher, Self-Service, Activity, Status, Labels, and all emails from the library (except receipts).

Homeroom

The location of a patron in a school is typically the student's homeroom or first period class. To ensure the accuracy of reports generated and sorted by this field, be consistent when entering information. Use **Tools > Authority** Control to fix any discrepancies. For example, you may print an overdue list of all students in a homeroom with overdue items. You are allowed to customize the name of this field in the Terminology preferences.

2nd Location

Use this field to group patrons by a second location or to track any other useful data. You can enter letters, numbers, as well as spaces in this field. Use **Tools > Authority Control** to fix any discrepancies. Therefore, to ensure the accuracy of reports, be *consistent* when entering information in this field. You could, for example, use this field to classify the ethnicity of patrons for government or internal reports. If desired, you are allowed to customize the name of this [sublocation] field in your **Terminology** preferences.

Grade

This field identifies the patron's level in school. Alexandria will advance patrons by one level after the last day of school if the level is set to either "*JK*" (j*unior/kindergarten*), "*PS*" (*pre-school*), "*K*" (*kindergarten*), or "*1-12*". Patrons automatically graduate to the next grade level on the date you enter as the last day of school on the **Library Information** preference window. Graduated patrons are given the grade level of "***Graduated***".

- This term can be customized by the librarian (see Terminology Preferences).

Graduation Date

Enter the date that the patron will graduate. You are allowed to customize the name of this [***Optional Date***] field in the **Terminology** preferences.

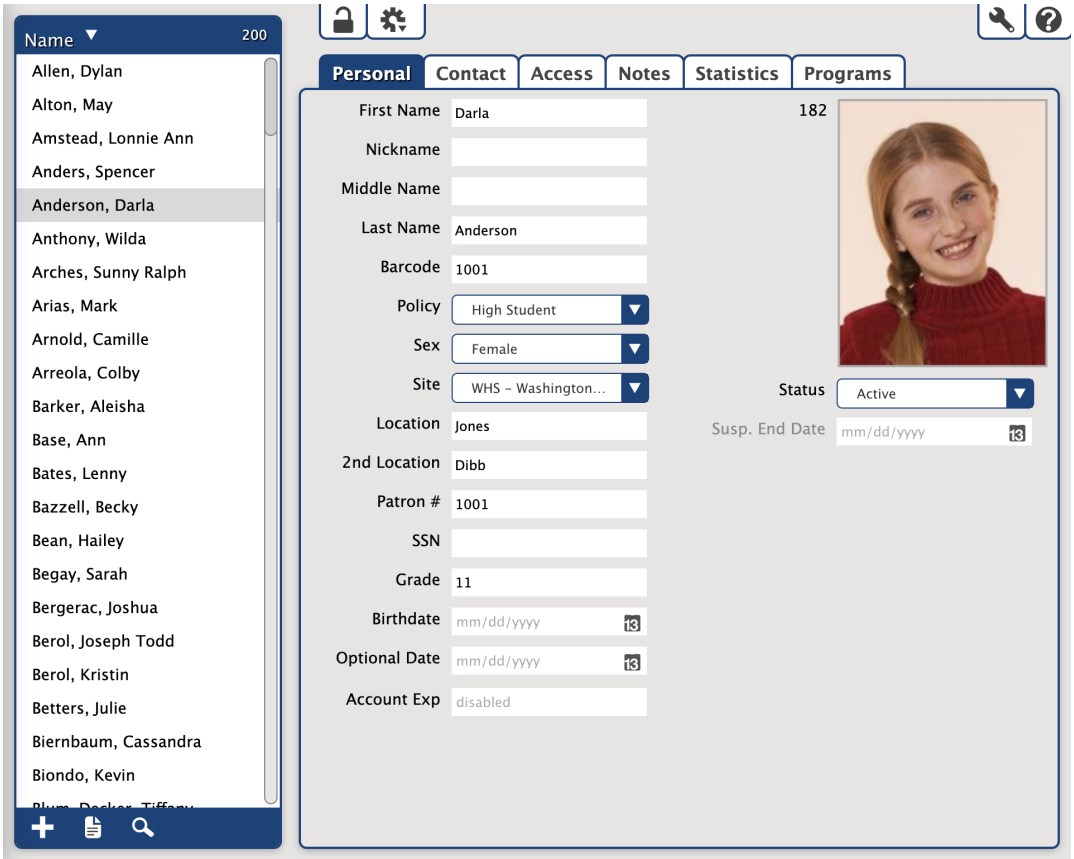
Account Expiration

Enter the date that the patron's account expires. If you leave this field blank, Alexandria will calculate the expiration date based on the patron's policy when the patron record is first added to the system. For example, if a **Patron Policy** in **Preferences** is set for 365 days, the account will expire 365 days from the date the patron was entered. When a patron's account expires, their status will be changed to Inactive during Alexandria maintenance.

Suspension End

If the patron **Status** is set to **Suspended** and a date is entered in this field, the suspension will expire on that date. The field appears grayed out if the patron's status is *not* set to Suspended.

Personal



First & Middle Name

Enter the patron (or operator) first name or the first name and middle name (or the first name and middle initial).

Nickname

Enter the patron's nickname if they have one. This could be a shortened version of their first name or an entirely different name they prefer to go by. It will be displayed in parentheses after their first name in both Patrons Management and the Circulation Current Patron pane, and can be used to look up a patron record. Also, a patron's nickname will be used in place of their first name in Self-Service, Activity, Status, and all emails from the library (except receipts). This field is optional.

Last Name

Enter the patron (or operator) last name. This field is required, you *cannot* save a record without a last name.

Barcode

Each patron and operator is assigned a unique barcode up to 15 characters long, based on the value set in Preferences > Patrons. You can change the assigned barcode here.

Learn more in Barcode Your Collection.

Policy

The policy that you assign to a patron or operator determines the library rules to which this patron or operator must adhere. To choose a policy for a patron, click the arrow at the end of the **Policy** drop-down menu and select a value. The default policy for new patrons or operators is automatically assigned based upon your **Default Policy** setting in the **Patron Defaults** preferences.

Sex

Use this drop-down menu to help identify the sex of this patron; **Male**, **Female**, or **Unspecified**. The default is Unspecified until the patron's sex has been designated.

Site

Use this drop-down menu to choose the site or school that your patron attends. A list of valid and available sites will always be pulled from **Sites Management** window. To ensure the accuracy of reports, be *consistent* when selecting this information. Reports can be generated and sorted by this field. For example, you may print an overdue list for all the students of a particular school.

Homeroom

The location of a patron in a school is typically the student's homeroom or first period class. To ensure the accuracy of reports, be *consistent* wh en entering information in this field. Reports can be generated and sorted by this field. For example, you may print an overdue list of all students in a homeroom with overdue items. You are allowed to customize the name of this [***Location***] field in the **Localization** preferences.

2nd Location

Use this field to group patrons by a second location or to track any other useful data. You can enter letters, numbers, as well as spaces in this field. Reports can be generated and sorted by this field. Therefore, to ensure the accuracy of reports, be *consistent* when entering information in this field. You could, for example, use this field to classify the ethnicity of patrons for government or internal reports. If desired, you are allowed to customize the name of this [sublocation] field in your **Localization** preferences.

Student

The community ID is designed to be used for your local ID. This could be a student code, phone number, parcel number or any other unique identification code. You are allowed to customize the name of this [***Community ID***] field in the **Localization** preferences.

SSN

In the United States, the “government ID” is typically the social security number (*SSN*); other countries may use other formats. You are allowed to customize the name of this [*Government ID*] field in the Localization preferences.

> **A Note About Community and Government ID**
>
> These are alternate, unique ID codes you may want to use with Alexandria. If you plan on updating patron information automatically from a central administration system (or you want to locate patrons by alternative codes, enter data in these fields). Duplicate values are *not* allowe d; if a duplicate code is entered, Alexandria will give you an error message, notifying you that you need to make your code unique.

Grade

This field identifies the patron's level in school. If the school library and graduation date have been entered, Alexandria will assign the level based on your preferences. If you enter a level and a school library, Alexandria will calculate the graduation date for you. Alexandria will advance patrons by one level after the last day of school if the level is set to either “*JK*” (*junior/kindergarten*), “*PS*” (*pre-school*), “*K*” (*kindergarten*), or “*1-12*". Patrons automatically graduate to the next grade level on the date you enter as the last day of school on the **Library Information** pr eference window. Graduated patrons are given the grade level of “***Graduated***”.

- This term can be customized by the librarian (see Terminology Preferences).

Birthdate

Enter the patron's birth date. This information is used solely for reference.

Graduation Date

Enter the date that the patron will graduate. You are allowed to customize the name of this [***Optional Date***] field in the **Localization** preferences.

Account Exp

Enter the date that the patron's account expires. If you leave this field blank, Alexandria will calculate the expiration date based on the patron's policy when the patron record is first added to the system. For example, if a **Patron Policy** in **Preferences** is set for 365 days, the account will expire 365 days from the date the patron was entered. When a patron's account expires, their status will be changed to Inactive during Alexandria maintenance.

Patron Picture

This is the patron picture field; if you would like to add or change a patron’s picture at this time, you can upload a GIF, BMP, PCT, PNG, JPG (or any other standard image file) using the **Browse for Patron Picture** selection from the primary **Actions** menu of **Patrons Management**; you can reset to the *default patron picture* by selecting **Remove Patron Picture**. Although they turn up elsewhere, patron pictures primarily appear in the **Current Patron** pane of **Circulation**.

Status

Use this drop-down menu to change the status of the current patron. The **Status** setting separates *active* patrons from those with *special circumstances* such as a lost cards or or transferred. Select one of the following available statuses from the patron **Status** drop-down menu:

- **Active.** These patrons can use the library (check in and out) according to the rules of the assigned patron policies.
- **Lost Card** or **Suspended**. These statuses cause a warning message to appear when the patron barcode is entered in the Circulation module and require operator intervention in order to continue.
- **Transferred**, **Inactive**, or **Other**. These options are used mainly for generating reports for patrons with a statuses other than **Active**; for example, those who have transferred or are inactive. These statuses cause an alert message to appear on the Circulation module when the patron barcode is entered.

Suspension End Date

If the patron **Status** is set to **Suspended** and a date is entered in this field, the suspension will expire on *this* date. The field appears grayed out if the patron's status is *not* set to Suspended.

GUID

If you use Clever, the patron's GUID will be displayed in small lettering just above the **Site Access** button. This cannot be edited and is only there for reference.

Picture

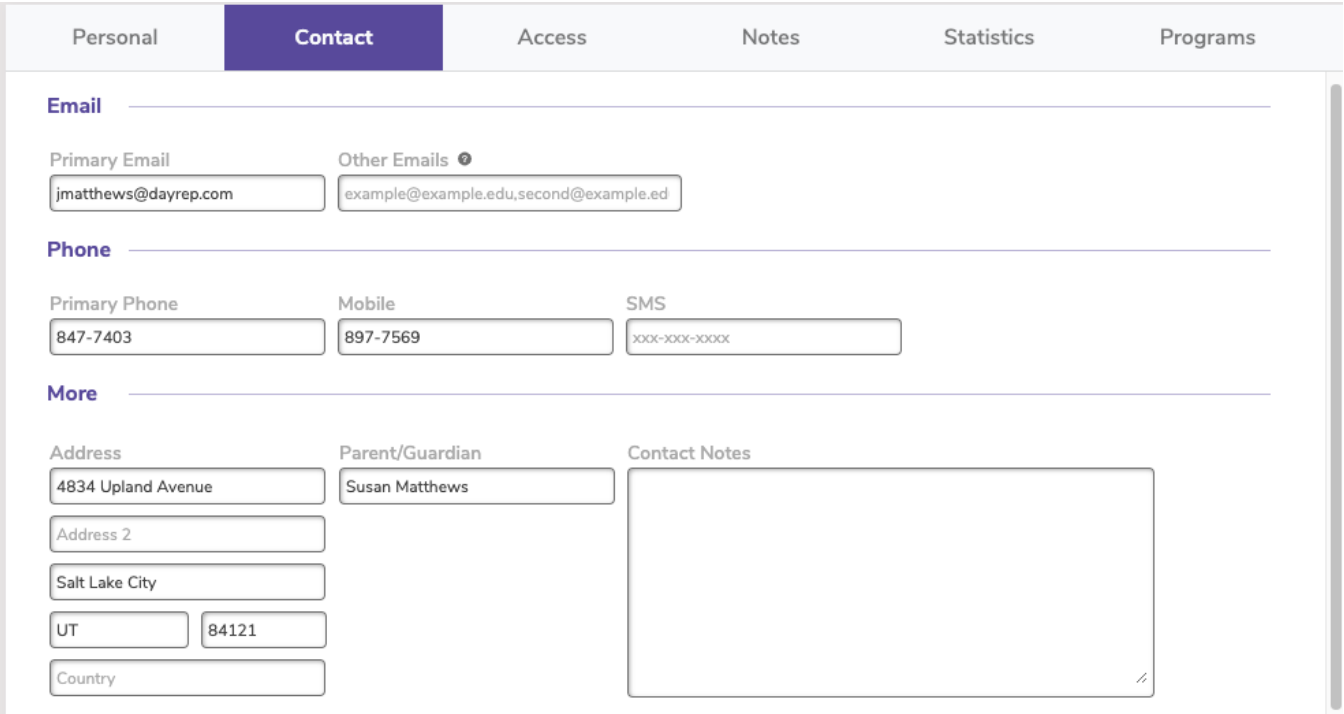
There are several ways to add patron pictures. You can upload a JPEG, GIF, PNG, or BMP (or any other image format that your browser supports) using the **Browse for Patron Picture** selection from the primary **Actions** menu of **Patrons Management**. Or, you may drag the patron picture from your operating system desktop into the picture field of the **Patron Management** window's **Personal Info** tab. There is a 250kb size limit for uploaded images. Lastly, you can import multiple patron pictures at once. Larger images will be auto-sized and shrunk (or stretched) to fit the *240 x 186* pixel specifications if they're revealed to be too large (or small). Whichever way you choose, the patron picture should now appear in the right-hand area of the **Personal Info** tab.

Back to top

Contact

Contact

The **Contact** tab identifies contact information for the patron, including the parent or guardian you need to contact in case of emergency.



Primary Email

Enter the patron's primary email address. This is the email used for email notifications (like overdue notices), resetting passwords, and syncing patron information to your SIS. *To guarantee that email notifications are being sent, check the* ***Enable Automatic Email Notifications*** *box in your* ***Circulation Settings*** *preferences.*

Note: for Adding Operators, high level operators are required to enter an email.

> ⚠ Email Preferences must be properly configured for emails to go out.

Other Emails

Enter up to five additional emails, separated by commas.

Primary Phone

Primary phone number. This is the number that will show on select reports.

Mobile

Mobile phone number

SMS

Number for SMS/ text messages, which will be available in a future update.

Address

Street, city, state, zip code, and country

Parent/Guardian

Patron parent/guardian name (these terms are customizable in terminology preferences). This is used when you choose to address reports to the parent/guardian.

Contact Notes

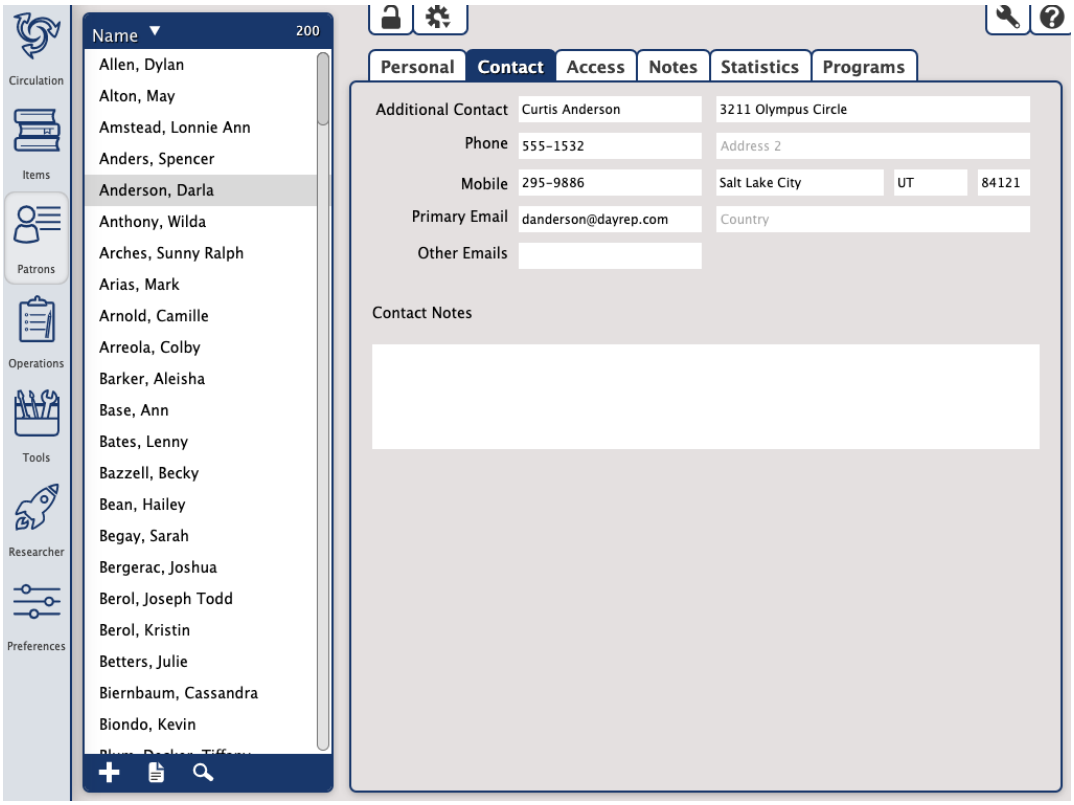
Use this field to enter notes on how to contact this patron or the patron's legal guardians. You can also use the Contact Notes field to track names, additional phone numbers, and email addresses.

Learn more about setting up email notices for patrons and librarians.

Patron contact information can be viewed and changed by patrons in the Researcher interfaces, if your security preferences allow.

Contact

The **Contact** tab identifies contact information for the patron, including the parent or guardian you need to contact in case of emergency. You may enter more than one name, address, and email by separating them with a comma.



Settings

Additional Contact

Enter the patron's parent or guardian. This information is used solely for reference.

Phone and Mobile

Enter the phone number and fax number that should be used to notify the patron of special events, overdue items, in-stock holds, and other official library business.

Address, City, State, Postal Code, and Country

Enter the patron's mailing address. Notices and letters will be sent to this address.

Primary Email

Enter the patron's primary email address. This is the email used for all email notifications (like overdue notices), matching with your SIS, and resetting passwords. To guarantee that email notifications are being sent, check the **Enable Automatic Email Notifications** box in your **Circulation Settings** preferences.

Just Text Me Please!Enter an SMS email address to send notices via text message.

Learn more about setting up email notices for patrons and librarians.

Other Emails

Enter additional emails (e.g. parent/guardian) and separate them by commas. This field is mostly for reference and in most cases these addresses won't receive notifications.

As of Alexandria version 21.2, you can choose to send some email notices to *only* the Primary Email or *all* emails on a patron's record for the following notice reports. That way, you can make sure both patrons and parents/guardians get a notice if necessary.

- *Overdue Items Notice* (Librarian and Textbooks)
- *Overdue Items and Unpaid Charges Notice*
- *Unpaid Charges Notice*

Contact Notes

Use this field to enter notes on how to contact this patron or the patron's legal guardians. You can also use the Contact Notes field to track names, additional phone numbers (cell, home, work, or fax), and email addresses.

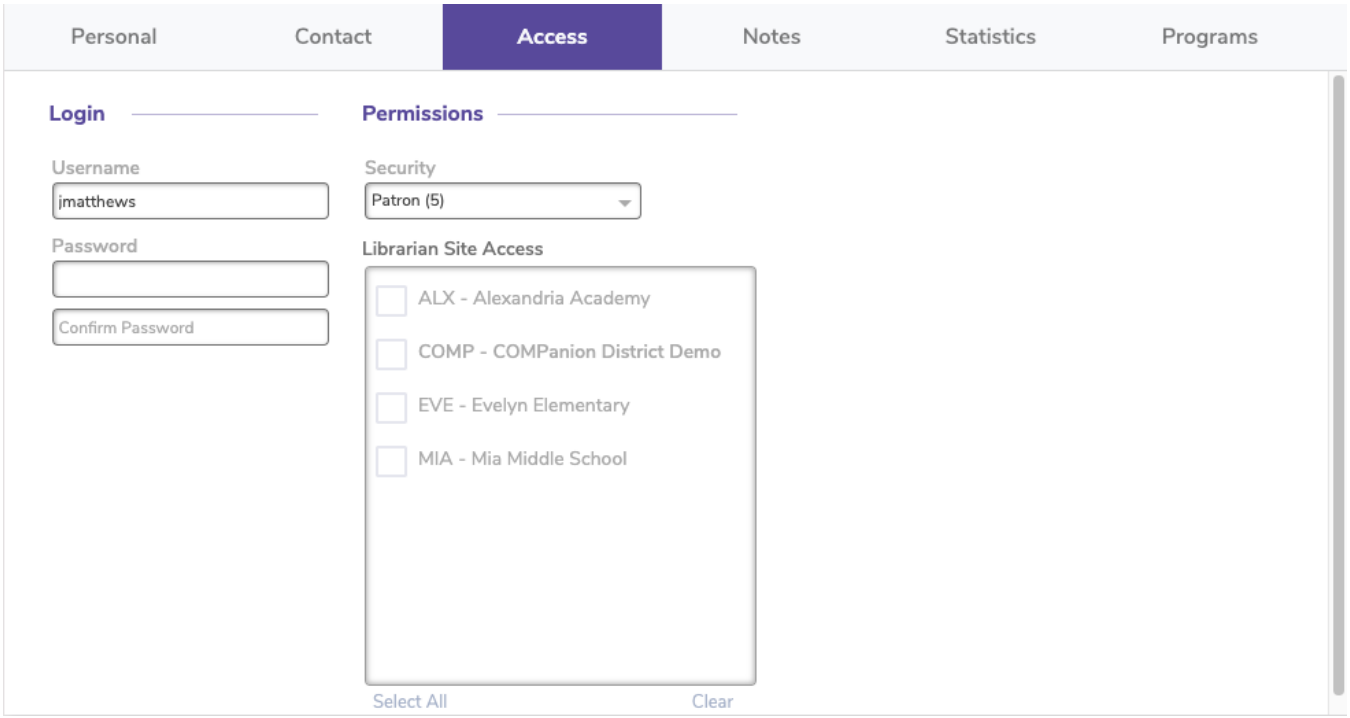
Patron contact information can be viewed and changed by patrons in the Researcher interfaces, if your security preferences allow.

Back to top

Access

Access

The **Access** tab contains a patron's Security Group and Site Access in addition to their username and password.



Username

Provide the username that allows operators to log into the Alexandria **Librarian** securely and your patrons to access the **Researcher** interfaces and place holds, reservations, and check their status and details.

Password/Confirm Password

Here is where you create, confirm, and change *mandatory* patron passwords. If you don't provide one at the time of creation, the password will default to the patron's **Last Name** without spaces or punctuation. Patrons with special characters or accents in their last name will be prompted to create a new password when logging in, as diacritical letters are not supported in the password field. For security reasons, passwords are never shown anywhere in Alexandria.

When set, patron passwords must meet the following requirements according to the Password Strength setting of their Security group:

- **Weak:** At least 6 characters.
- **Regular:** At least 8 characters, including at least one letter (a-z) and one number (0-9).
- **Strong:** At least 10 characters, including at least one letter (a-z), one number (0-9), and one symbol (!@#$%^&*-=+.,).

Passwords are not case sensitive.

There are some cases where patrons share a primary email (e.g. a parent's email). When a password is reset, a separate password reset email will be sent to every patron record that shares that primary email.

Security

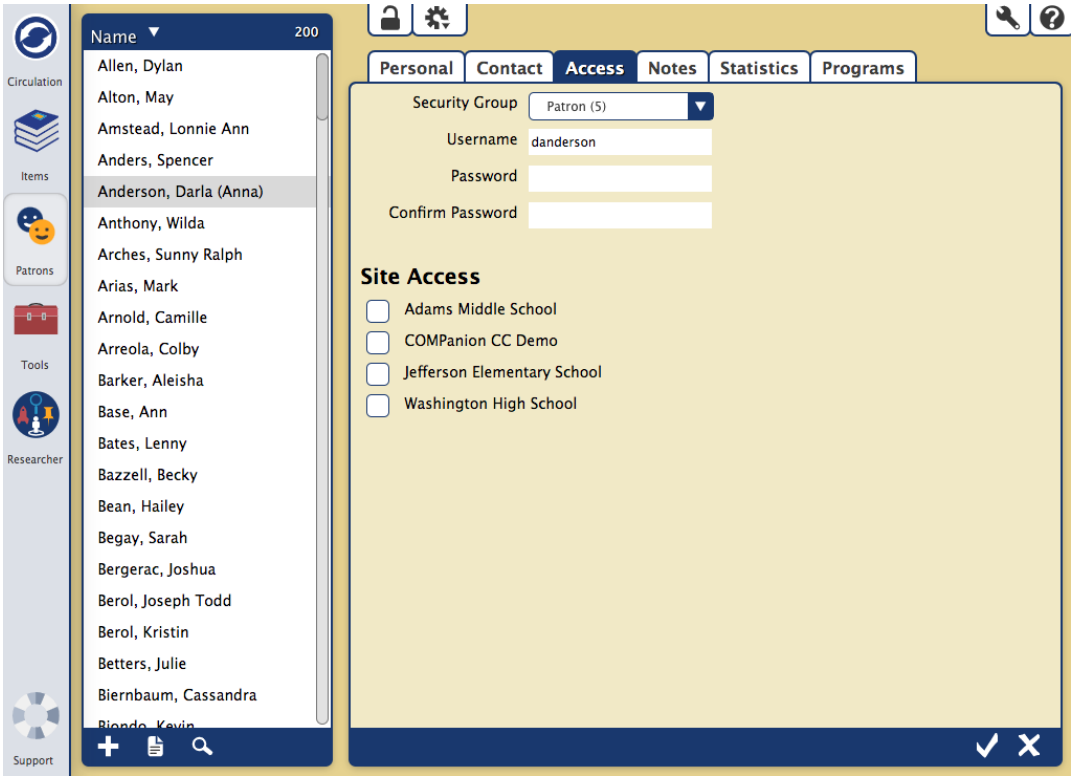
This is the security level assigned to this patron or operator; a user's access level determines what operations they are allowed to perform. Security Groups can be created, removed, or adjusted in Security.

Librarian Site Access

Check (or uncheck) any sites that the operator is permitted to access. This list of valid and available sites will *always* be pulled from Sites Management.

Access

The **Access** tab contains a patron's Security Group and Site Access in addition to a patron's username and password.



Security Group

This is the security level assigned to this patron or operator; a user's access level determines what operations they are allowed to perform. Security Groups can be created, removed, or adjusted in Security.

Username

Provide the username that allows operators to log into the Alexandria **Librarian** securely and your patrons to access the **Researcher** interfaces (including **Scout**) and place holds, reservations, and check their status and details.

Password/Confirm Password

Here is where you create, confirm, and change *mandatory* patron passwords. If you don't provide one at the time of creation, the password will default to the patron's **Last Name** without spaces or punctuation. Patrons with special characters or accents in their last name will be prompted to create a new password when logging in, as diacritical letters are not supported in the password field. When changing or creating a patron password, be sure that the passwords you enter in the **Password** and **Confirm Password** fields *exactly* match; be sure to provide *both*. For security reasons, passwords are never shown anywhere in Alexandria.

When set, patron passwords must meet the following requirements:

- **Weak:** At least 6 characters.
- **Regular:** At least 8 characters, including at least one letter (a-z) and one number (0-9).
- **Strong:** At least 10 characters, including at least one letter (a-z), one number (0-9), and one symbol (!@#$%^&*-=+.,).

Passwords are not case sensitive.

Site Access

Check (or uncheck) any sites that the patron or operator is permitted to access. This list of valid and available sites will *always* be pulled from Sites Management.

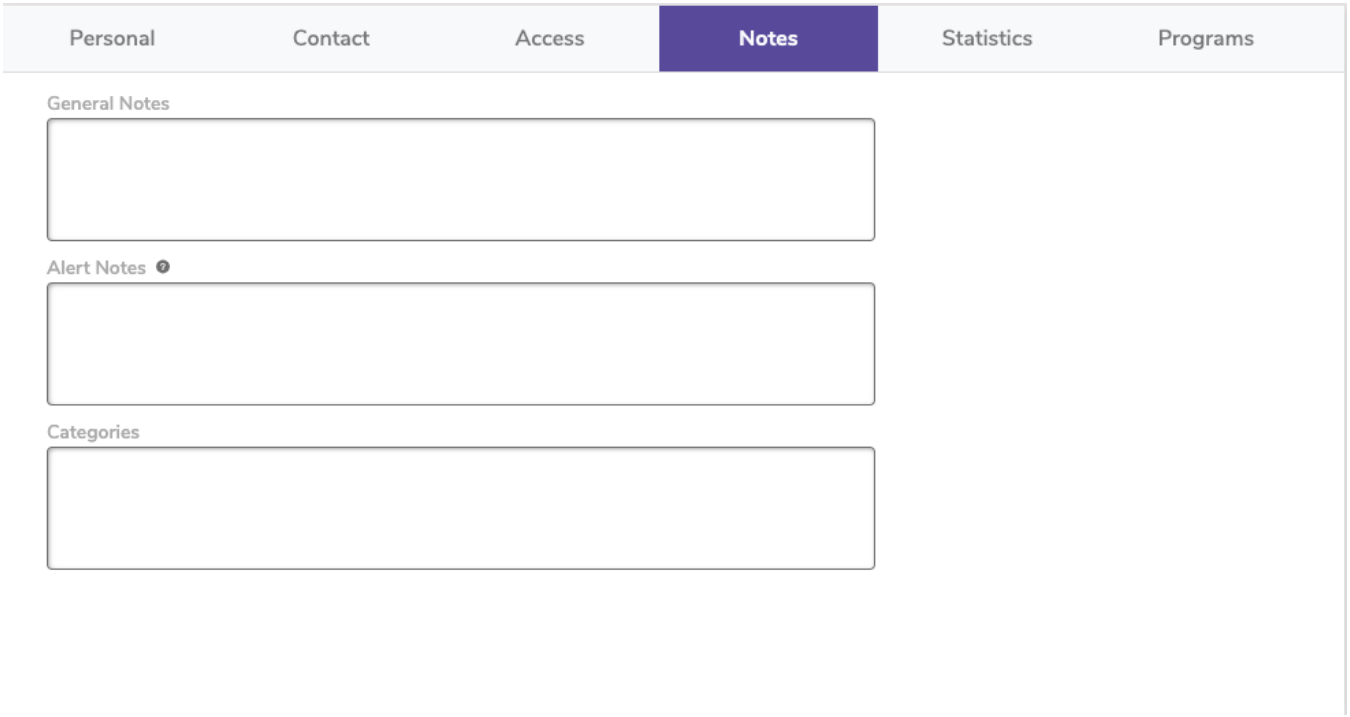
Back to top

Notes

Notes

The **Notes** tab can be used to include additional information about the patron. If any notes are attached to a patron record, you can view them by clicking **Notes** in the action menu of the **Current Patron** pane of **Circulation**. Notes are meant for operator use and can only be seen here and in Circulation. They are also included in some reports.

These comments can only be viewed from the **Circulation** module.



General Notes

This field can be used to attach additional comments about a patron.

Alert Notes

This field is used to make the librarian aware of special circumstances regarding a patron.

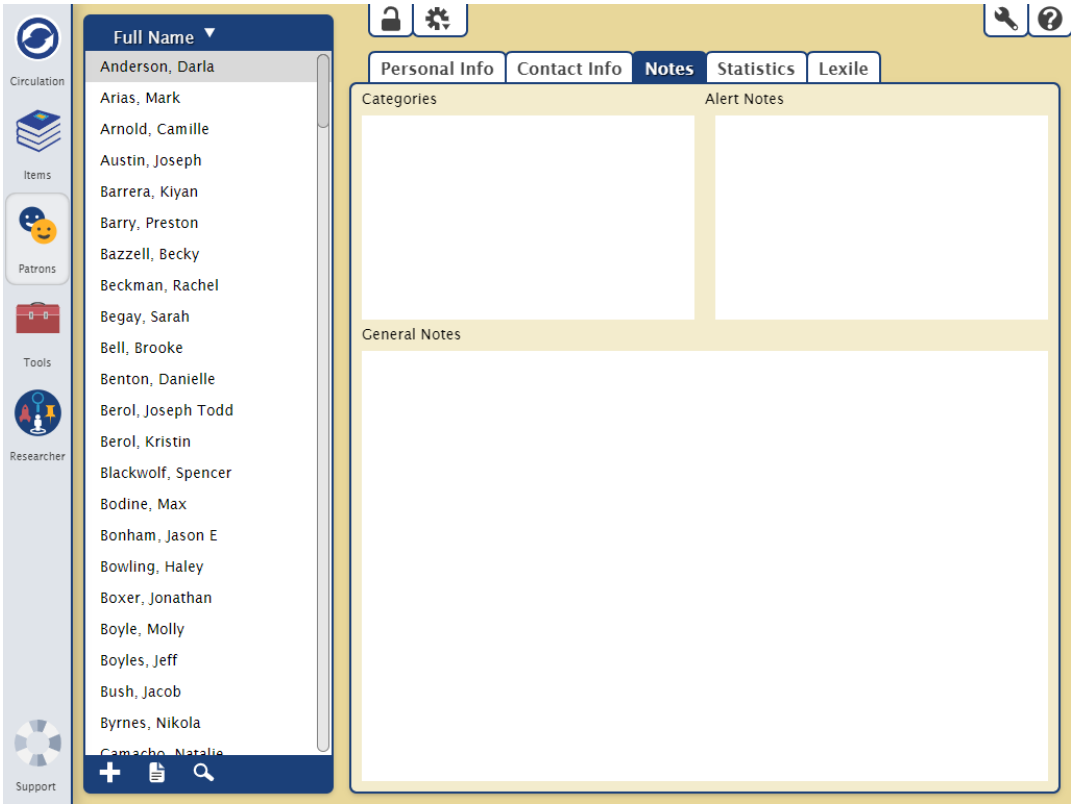
For example, you can create an alert note so that you may "pass along" certain information to the patron the very next time they use the library. The alert message will automatically appear on the **Circulation** module when you enter the patron's barcode number.

Categories

Enter information about groups the patron belongs to; for example, special reading programs, at-risk students, special education students, gifted students, library contest students, or any other groups that you find useful. These category entries can be used to select patron records for reports.

Notes

The **Notes** tab can be used to include information about groups for which the patron belongs or general notes about the patron. If any notes are attached to a patron record, you can view them by clicking **Notes** at the bottom of the **Current Patron** pane of **Circulation**.



Settings

Categories

Enter information about groups the patron belongs to; for example, special reading programs, at-risk students, special education students, gifted students, library contest students, or any other groups that you find useful. These category entries can be used to select patron records for reports.

Alert Notes

This field is used to make the librarian aware of special circumstances regarding a patron.

For example, you can create an alert note so that you may "pass along" certain information to the patron the very next time they use the library. The alert message will automatically appear on the **Circulation** module when you enter the patron's barcode number.

General Notes

This field can be used to attach additional comments about a patron. These comments can only be viewed from the **Circulation** module.

To view notes for the current patron in Items Management, click **Notes** at the bottom of the Current Patron pane in Circulation or enter a plus sign (**+**) in the Circulation command line.

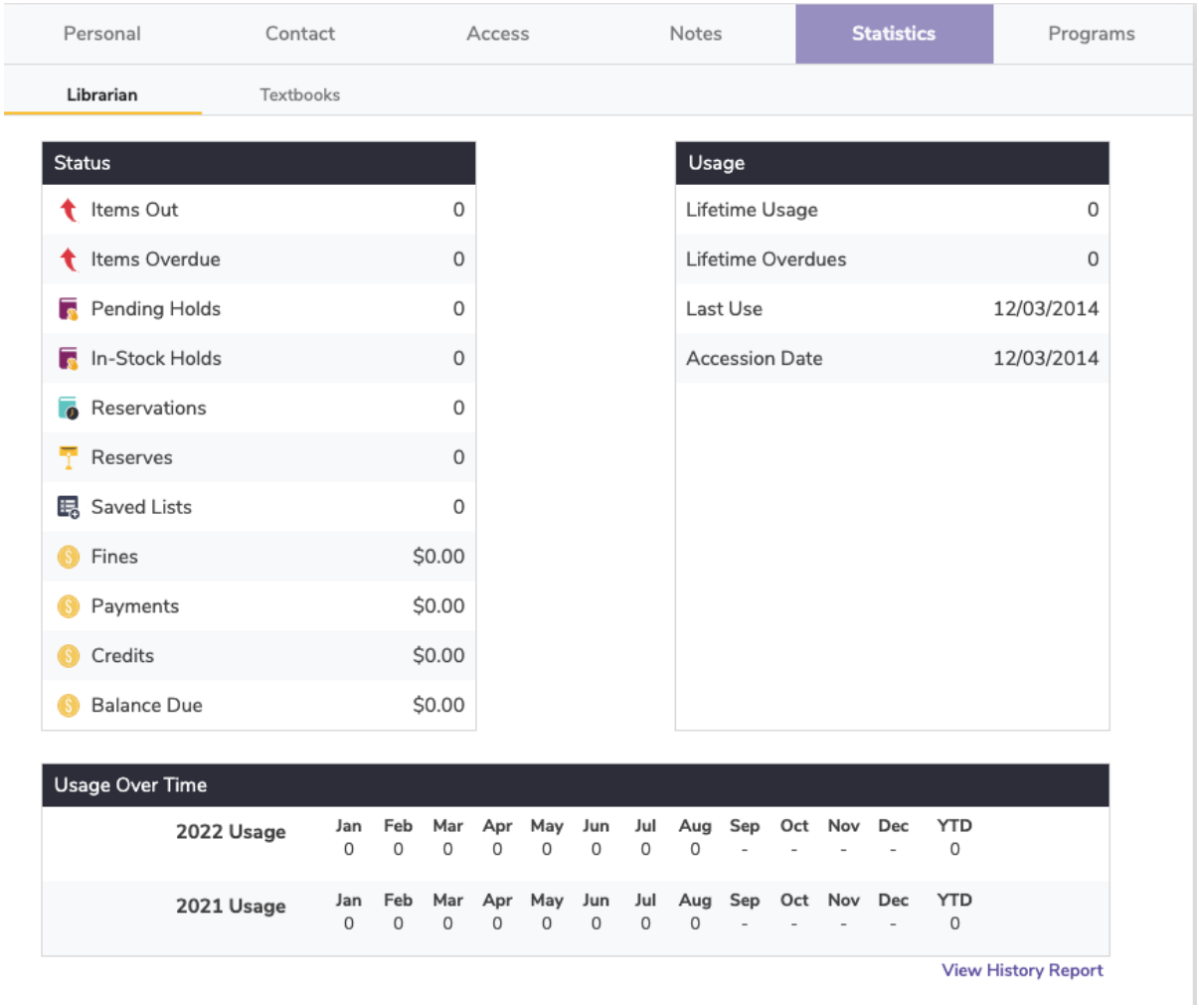
Back to top

Statistics

Statistics

The **Statistics** tab contains historical information about your patron's recorded library usage. This data is automatically generated by Alexandria and cannot be modified.

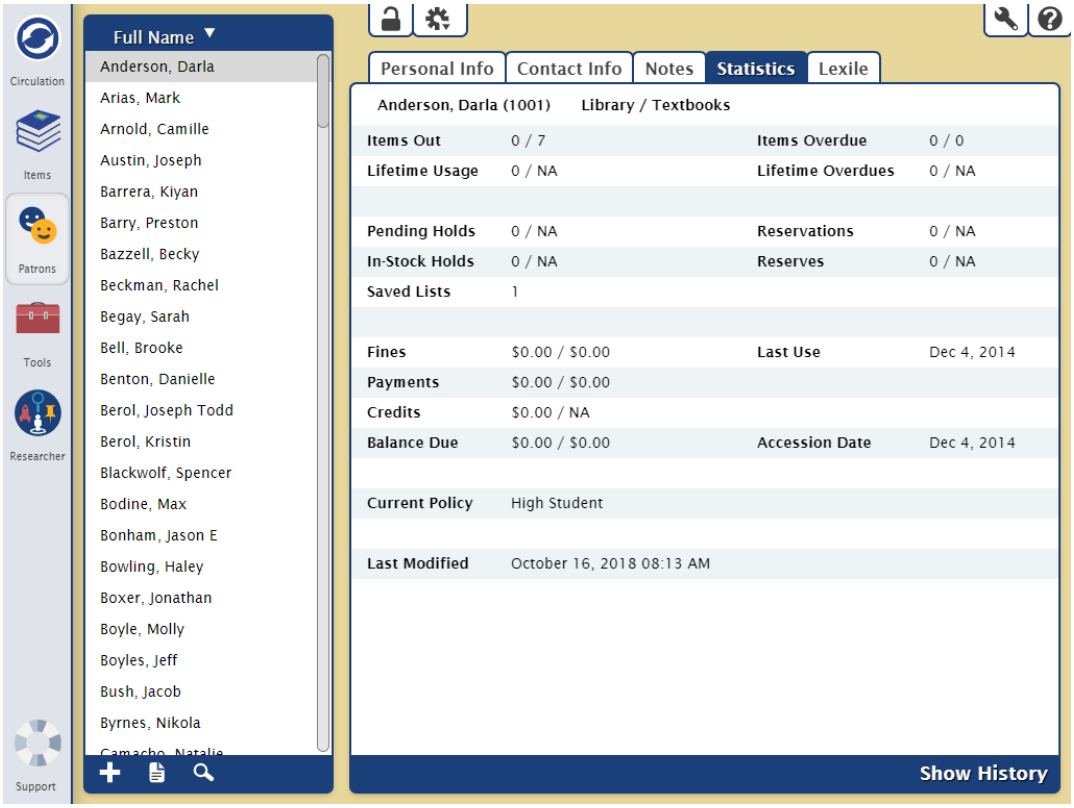
At the bottom of the window, click **View History Report** to download a PDF of the patron's complete transaction history. This is the same as running a Patron History report.



Patron Statistics

The **Statistics** tab contains historical information about your patron's recorded library usage. This data is automatically generated by Alexandria and cannot be modified.

At the bottom of the window, click **Show History** to download a PDF of the patron's complete transaction history. This is the same as running a Patron History report.



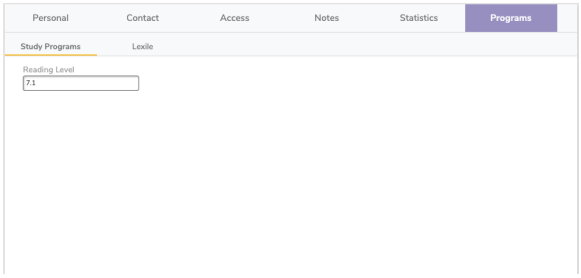
Unknown macro: 'multiexcerpt-include-macro'

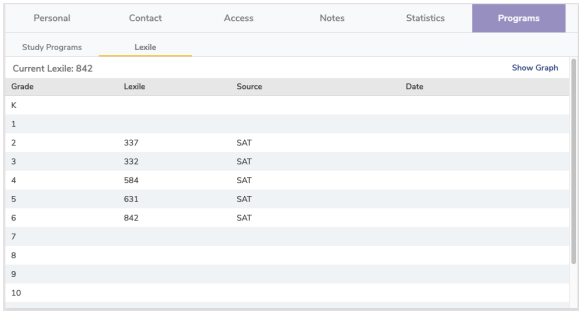
Back to top

Programs

Programs

The **Programs** tab contains two subtabs: **Study Programs** and **Lexile**.





Study Programs subtab

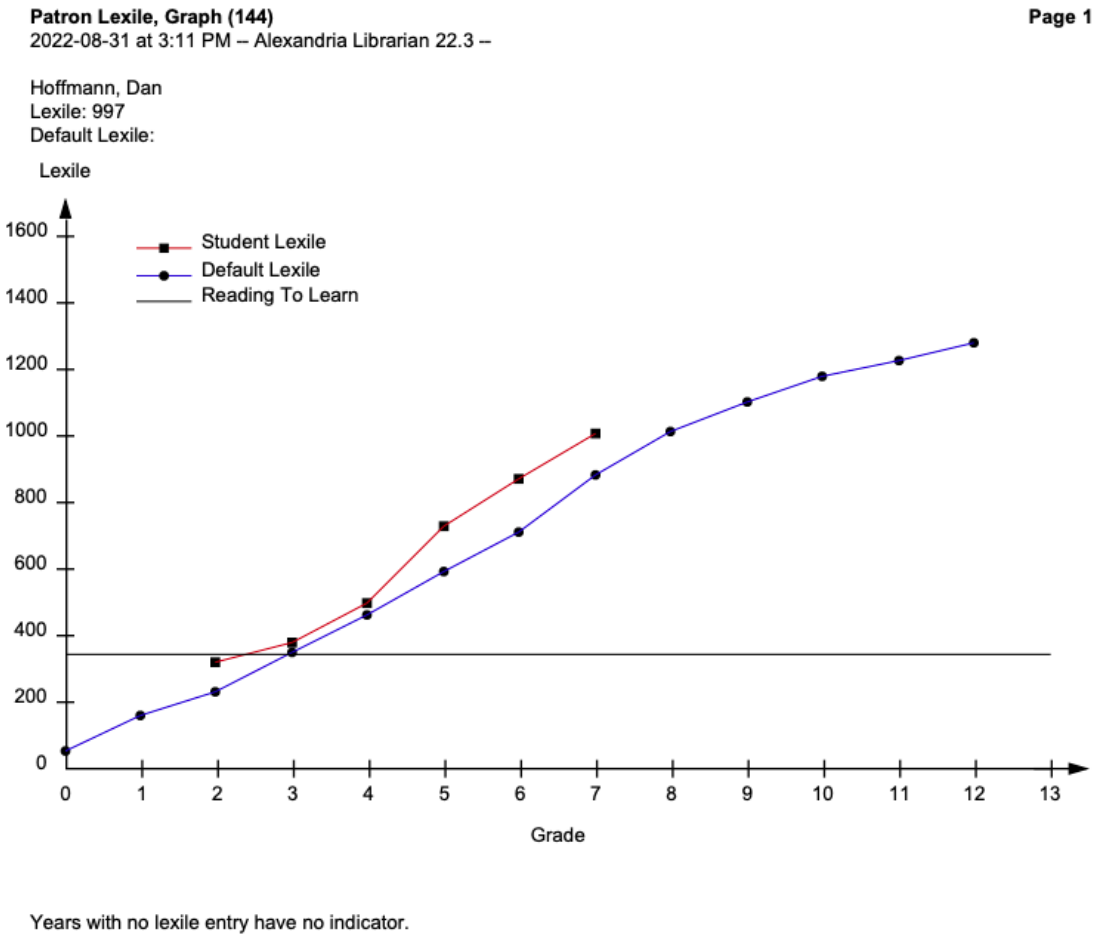
Reading Level

Any reading level-related information you provide in this field will appear in the Current Patron Pane of the Circulation module when a patron is made current. It is commonly used as a quick reference for library staff to determine if an item's readability is compatible with your patron. If the term Reading Level is not specific enough for your needs, you can customize this terminology in the **Terminology** preferences (e.g. Fountas and Pinnell or Accelerated Reader).

- If your account does not wish to use this field to store reading level information, it can be repurposed and used to store *other information* such as whether your patrons have accepted your **AUP** (*acceptable usage policy*); in this case, you would provide the appropriate information in the field (e.g. "*Accept"/"Decline", "Yes"/"No", "Agree"/"Disagree"*, etc.).

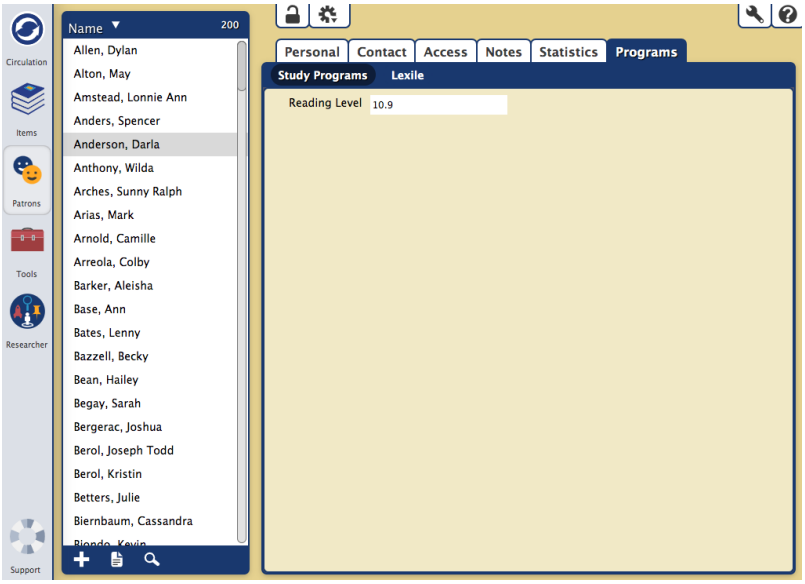
Lexile subtab

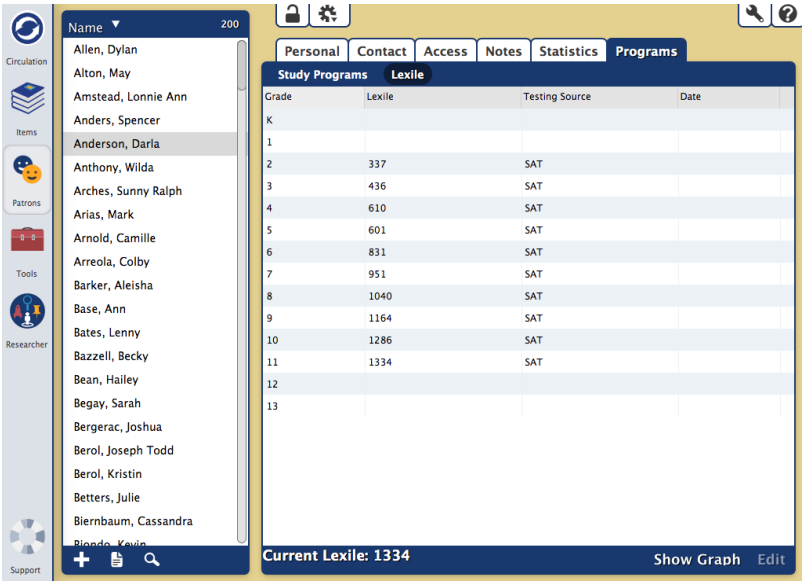
Here you will find the patron's Lexile table. See Patron Lexiles for more information. Click Show Graph to see a graph of the student's Lexile levels.



Programs

The **Programs** tab contains two subtabs: **Study Programs** and **Lexile**.





Study Programs subtab

Reading Level

Any reading level-related information you provide in this field will appear in the Current Patron Pane of the Circulation module when a patron is made current. It is commonly used as a quick reference for library staff to determine if an item's readability is compatible with your patron. If the term Reading Level is not specific enough for your tastes, you can customize this terminology in the **Localization** preferences (e.g. Fountas and Pinnell or Accelerated Reader).

- Typically, the term **Reading Level** will suffice unless your site doesn't use reading levels or the terminology is irrelevant. In this case, the field can be renamed in your Terminology preferences and used to store *other information* such as whether your patrons have accepted your **AUP** (*acceptable usage policy*); in this case, you would provide the appropriate information in the field (e.g. "*Accept"/"Decline", "Yes"/"No", "Agree"/"Disagree"*, etc.).

Lexile subtab

Here you will find the patron's Lexile table. See Patron Lexiles for more information.

Back to top