

qt3

Add a Patron

Open Patron Management by clicking on the name of the current patron or No Current Patron.

Click the plus icon at the bottom left to create a new patron. You will need to give the patron a name before you can save the record.

The Barcode will automatically fill with your 'next patron barcode' — set in your Patron Defaults Preferences — and you can change it if needed.

Set the patron Policy, enter their Email, and if necessary fill in the Grade and Homeroom.

Note that all Patrons have a Security Group that determine their level of access to the Alexandria program.

For your standard patron, you will choose the Patron security group. If this is an operator such as a librarian or library aide, choose a different group such as Librarian or Aide to give them access to Circulation or whatever else is outlined in your Security Preferences.

Look under the Contact Info tab for fields such as Phone and Mobile numbers, and Parent/Guardian.

Use Notes to enter any Alert Notes for the patron.

Note: Under Statistics, if you have chosen to Keep History for all patrons or for all patrons of this policy, you will not be able to uncheck the box to Keep Patron History. If, on the other hand, you are not keeping history in general, you would be able to check this box to keep history for this patron specifically.

When you are finished, save the record.