

## Advancing Patron Grades

At the end of the year, students typically move up a grade, which could be inconvenient for you and your records if it weren't for the Advance Patron Grades options.

There are two places to find this wonderful tool. You can use Utilities -> Patrons, the Advance Patron Level utility, or, for this example, I will show you how to advance the grades right from the Grade Table.

Open Preferences, go to Patrons, and Grade Table. The data I'm using is for a middle school, so the grades are 6 through 9. What this means is any patron who was in 6<sup>th</sup> grade will be shown as being in 7<sup>th</sup> grade after I press this 'Advance All Grades' button, and any patron who just finished 9<sup>th</sup> grade will be shown as 'Graduated', or whatever term you have in this Last Grade field.

Note that the entries in the Grade Table must match the values in the Grade field of your Patron records. For instance, if the table shows '7' and your records have '7th', the Advance All Grades utility will not work.

Let's take a look at some of the patrons we have right now. Jesse is currently in 7<sup>th</sup> grade, Theodore is in 8<sup>th</sup>, and Emily is in 9<sup>th</sup>.

Before you advance the grades you may want to run an Archive; in your Admin preferences, under Status, click on Archive.

Now I'll Advance All Grades, say yes I'm sure, and it should be done.

Ok, so did it work? Well, it looks like Jesse is still in 7<sup>th</sup> grade — what's going on? The answer is *this* is not the patron's grade, but her policy. If you name your policies after the grades, be careful to differentiate.

Opening Patron Management, we can see she *has* advanced to 8<sup>th</sup> grade, Theo to 9<sup>th</sup>, and Emily has graduated.

So let's put these patrons under their correct policies. To do that, just go to Tools -> Utilities, the Patrons category, and the utility Change Patron Policy.

Don't run it as it is -- by default it will change all patrons.

Be sure to set the Patrons in Level to the correct grade, 8 in this case, then under Options, Change Policy to 8th Grade.

This will replace the policies of all patrons in 8<sup>th</sup> grade with the 8<sup>th</sup>-grade policy.

Now run it.

After this, we'll have to repeat for 9<sup>th</sup>, and there we go.

You can do the same thing for your Graduate patrons if you have a policy for Graduated.

Now Jesse is under the 8<sup>th</sup> Grade patron policy, and Theo is under the 9<sup>th</sup> Grade patron policy — check the transaction log or Operation Management just to make sure things went OK, and you've done it!