

Batch Update Patron Profiles

Process overview

If you need to make changes to a number of patrons' Profile settings all at once, you can now do so using the Batch Update Patron Profile tool. This may be useful in case of library policy changes, while transitioning batches of patrons to Duplication circulation, and for using Next Service Dates to space out new patrons' first cartridges.

Because it works with many patrons at once and mistakes can be tricky to undo, we recommend that this is left to KLAS Administrators. Many libraries restrict access to the Tools menu—if that is the case at your organization, this new tool will already be appropriately locked down.

If you ever find that you have applied changes to the wrong patrons, please contact Keystone Customer Support for assistance in backing things out, preferably sooner rather than later!

Step One – Define your Query

1. Run a Patron Query to define which set of patrons should be affected by the update.
2. Make sure to review the results! Check that all wanted patrons are included, and all unintended patrons are **not** included.
3. If you haven't already, double-click any query result to enter the Query Set.

Step Two – The Batch Update tool

1. Use the Tools menu to open Batch Update Patron Profile.
2. Review the Search Statement to double-check that you are in the correct Query Set.
3. You must select a Medium, to ensure that any changes are made to the correct medium record on the Patron Profiles. If a patron in the Query Set does not already have a record for that Medium, it will be created.
4. All other fields are optional. If a field is not filled in (or if a default entry on the screen is left in place) no changes will be made to that field. The only exception is the Nightly Debug check-box, which will always be applied as-is (meaning that if it is left unchecked, all patrons in the Query Set will have their Nightly Debug turned off).

Step Three – Process the Updates

1. When you have made **and reviewed** the updates, use the PROCESS button to apply them.
2. If there are any errors, they will be added to a report and displayed once all other updates have been applied.
3. If you are adding Service Queues, they will be filled via the batch manager, and may not be filled by the time the Batch Update is complete. The batch manager will continue working on them until they have all been filled.