Alumni Patrons
Patron Type 025

Membership is automatic for all U of S graduates. There are also special categories of membership. The information below explains the criteria for each category. The free Alumni Card is available at the University Advancement Customer Service Centre at:

Alumni Relations and Development
University Advancement
University of Saskatchewan
501 – 121 Research Drive
Saskatoon, SK  S7N 5C8
CANADA

Directions from the U of S:
North on Preston to Research Dr (intersection is just south of railroad tracks and identifiable by traffic lights). Turn left onto Research Dr and the University Advancement/Alumni Relations Office is in the first building on the left. There are parking spots available by the building.

Call (306) 966-5186 or email alumni.office@usask.ca to order your card for pick up or to have it mailed to you.

Member (Voting Status, Conferred at Convocation or Graduation)
a. Membership is conferred to persons holding degrees, certificates and diplomas from the University

Associate Member (Non-Voting Status, by Expression of Interest)
a. A person has completed one of the following and the class they started University with has since graduated
   i. One full year of classes (30 credit units)
   ii. Two semesters (Term 1, Term 2, Spring/Summer Session) that total 30 credit units.
   iii. 30 credit units over an extended period of time.
iv. Course work associated with a graduate program but has not completed theses or dissertation work  
b. A person has completed one year of a program that results in accreditation such as medical residency.  
c. A faculty member or staff member has retired from the University.

1. Patrons with existing records in Sierra.

Alumni must present an alumni card in order to obtain privileges. This card serves as their U of S Library card once a patron barcode is affixed and their personal information is updated in IAM. If they already have an older library card it can be used instead of assigning a new barcode. Alternately, if they prefer the newest version (2012) U of S Library card we can issue one to them.

![Library Card](image)

Note: Alumni patrons do not have access to the Learning Commons, but can print from a login OPAC.

When updating alumni records or adding new alumni records remember that all data is to be entered into IAM and the information will then transfer over to Sierra.

1. From the Quick Search, bring up the patron record.
2. From the Group memberships box, click in the Group Name text box.
3. Type PType 025 - Alumni. Enter.
4. The Effective date will default to today’s date.
5. Tab to Expiry Date. Set the expiry date in IAM for one year from date of issue.
6. Add Effective Reason (Alumni)
7. Add an Expiry Reason (Sierra expiry date)
8. Select ADD.

9. If available, select “Password PDF” to print NSID and temporary password. Give to patron.

10. Ensure all information is correct i.e. barcode, address, phone number, email, etc.

11. After adding a patron to a PType group or pressing the ‘Process Eligibility’ button, you will first see a series of messages telling you that you have “Successfully enqueued user for processing”, followed by “Processing user’s eligibility”, and finally “Successfully processed the user”. When you see the final message, “Successfully processed the user”, you can expect the record to be added/updated in Sierra.

12. The patron record should update in Sierra immediately. It is very important that you check the patron’s Circulation record after making a change to his/her record in IAM to ensure that the IAM information has transferred over. (Remember, the patron’s Sierra Circulation record must be closed in order for the transfer to take place.) If it does not update in Sierra as expected, click ‘Resync Library’.

13. Clicking this will not only resend the information that IAM has for that patron, but also open a page displaying the ‘Transaction Parameters’ – the list of attributes (name, address, phone number, email address, id numbers, etc) that are available for this patron and have been sent to Sierra. The page also displays the ‘Transaction Result’ telling us whether or not the library feed was successful.

14. Please note, the ‘Resync Library’ function will only work if the patron has a CURRENT record (not expired) in Sierra.

15. If, after clicking ‘Library Resync’, the change still does not take place in Sierra, it must reported to Library Systems & Information Technology as soon as possible. Report incidents where the updated IAM record fails to transfer to Sierra to the Circ Support email address (CircSupport@library.usask.ca). This account will be monitored at all times and action taken to provide library access to the patron as soon as possible.

16. Once the record has transferred to Sierra, check to see what email address has transferred. Sometimes the [NSID]@mail.usask.ca email account is the email that is transferred to Sierra. Point it out to the patron and inform him/her that email messages can be forwarded to an account of their choice. Give the patron the Email Account Users handout with instructions to forward email to an account of their choice.
2. Patrons who have a record in IAM but not in Sierra.

Alumni must present an alumni card in order to obtain privileges. This card serves as their U of S Library card once a patron barcode is affixed and their personal information is updated in IAM. If they already have an older library card it can be used instead of assigning a new barcode. Alternately, if they prefer the newest version (2012) U of S Library card we can issue one to them.

Note: Alumni patrons do not have access to the Learning Commons, but can print from a login OPAC.

When updating alumni records or adding new alumni records remember that all data is to be entered into IAM and the information will then transfer over to Sierra.

1. From the Quick Search, bring up the patron record.

2. From the Group memberships box, click in the Group Name text box.

3. Type PType 025 and enter.

4. The Effective date will default to today’s date.

5. Tab to Expiry Date. Set the expiry date in IAM for one year from date of issue.

6. Add Effective Reason (Alumni)

7. Add an Expiry Reason (Sierra expiry date)

8. Select ADD.

9. If available, select “Password PDF” to print NSID and temporary password. Give to patron.
10. Ensure all information is correct i.e. barcode, address, phone number, email, etc.

11. The patron record should update in Sierra immediately. It is very important that you check the patron’s Sierra Circulation record after making a change to his/her record in IAM to ensure that the IAM information has transferred over. (Remember, the patron’s Sierra Circulation record must be closed in order for the transfer to take place.) If the transfer does not happen within 5 minutes, press the “Process Eligibility” button. The complete IAM/U-Who information for the patron should transfer to Sierra almost instantaneously.

The failure to transfer must be reported to Library Systems & Information Technology as soon as possible. Report incidents where the updated IAM record fails to transfer to Sierra to the Circ Support email address (CircSupport@library.usask.ca). This account will be monitored at all times and action taken to provide library access to the patron as soon as possible.

12. Once the record has transferred to Sierra, check to see what email address has transferred. Sometimes the [NSID]@mail.usask.ca email account is the email that is transferred to Sierra. Point it out to the patron and inform him/her that email messages can be forwarded to an account of their choice. Give the patron the Email Account Users handout with instructions to forward email to an account of their choice.

3. Patrons who do not have a record in IAM or Sierra.

Alumni must present an alumni card in order to obtain privileges. This card serves as their U of S Library card once a patron barcode is affixed and their personal information is added to IAM. Alternately, if they prefer the newest version (2012) U of S Library card we can issue one to them.

Note: Alumni patrons do not have access to the Learning Commons, but can print from a login OPAC.

When updating alumni records or adding new alumni records remember that all data is to be entered into IAM and the information will then transfer over to Sierra.
1. Create a record for patron in IAM by clicking **UWho** on the tool bar. Select **Add Person** from the drop down menu. A **Create New UWho Person** form displays. Tab through each field entering as much information as possible. **Select Save.** The system will then prompt with “**Potential Matches Already Already**”. This can be ignored. **Select Save.**

2. Add all patron information to IAM: Barcode, Address, Phone number and email.

3. Return to Client Dashboard. From the **Group memberships** box, click in the **Group Name** text box.

4. Type **PType 025** and enter.

5. The **Effective date** will default to today’s date.

6. Tab to **Expiry Date**. Set the expiry date in IAM for one year from date of issue.

7. **Add Effective Reason** (Alumni)

8. Select **Add**.

9. If available, select “Password PDF” to print NSID and temporary password. Give to patron.

10. The patron record should update in Sierra immediately. It is very important that you check the patron's Sierra Circulation record after making a change to his/her record in IAM to ensure that the IAM information has transferred over. (Remember, the patron’s Sierra Circulation record must be closed in order for the transfer to take place.) If the transfer does not happen within 5 minutes, press the “**Process Eligibility**” button. The complete IAM/U-Who information for the patron should transfer to Sierra almost instantaneously.

    The failure to transfer must be reported to Library Systems & Information Technology as soon as possible. Report incidents where the updated IAM record fails to transfer to Sierra to the **Circ Support email address** (CircSupport@library.usask.ca). This account will be monitored at all times and action taken to provide library access to the patron as soon as possible.

11. Once the record has transferred to Sierra, check to see what email address has transferred. Sometimes the [NSID]@mail.usask.ca email account is the email that is transferred to Sierra. Point it out to the patron and inform him/her that email messages can be forwarded to an account of their choice. Give the patron the Email Account Users handout with instructions to forward email to an account of their choice.