



PATRON REGISTRATION

JUNE 20, 2017

Updated DEC 5, 2017

Follow the Post Office Guidelines

- Enter Data in ALL CAPS
- Do not use punctuation
- Use A hyphen in full +4 digit zip codes
- Use address abbreviations wherever possible (AVE, ST, LN, DR, RD)

Before creating a new account

- Always check through “User Display” to see if the user already has a card.
- Double Check User Profile to ensure it is in use by your library.

Basic Info

- Enter the patron’s name as follows:

Title:
First name: CANDI
Preferred name: Use preferred name
Middle name:
Last name: BARR

Don't forget to check the box to use a preferred name.

- Library and Profile Name: Ensure your library and user profile are correct. Use the wizard properties to set default entries (right click wizard name, edit/save properties) to make it set to your library every time.

In this library: MTSC
Profile name: MSL-PUB
Charge history rule: NOHISTORY

Make sure the top dropdown indicates your library
The second dropdown indicates the profile for this patron within your library.
The third dropdown indicates the patron's choice to keep charge history. It defaults to off for all users. If you want to start using it, you will need to contact the MSC or it will reset every night.

Mailing Address:




- The mailing address your patron primarily uses for library contact goes in address 1

Address 1
STREET: 123 HERE ST
CITY/STATE: HELENA MT
ZIP: 59601

- Include apartment/suite numbers on the same line as the street address

- Use address 2 and 3 for other addresses

Address 2

  	
STREET	
CITY/STATE	
ZIP	
EMAIL	
PHONE	
PHONE2	
CARE/OF	
COMPANY	

- To switch a user to a secondary address use this selection tool at the top of the address section.

Primary: Address 1 Address 2 Address 3

Email:

- If the patron wishes to use multiple email addresses, separate them with a comma.

EMAIL	DESSERTFIRST@YUMMY.COM, CBARR@PROFESSIONAL.GOV
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Phones:

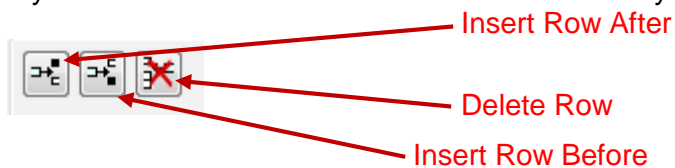
- If the patron wants to use more than one phone field, put a description in parenthesis after the number.

PHONE	406-555-5555 (CELL)
PHONE2	406-555-5555 (FAX)
PHONE3	

- Use Phone notice to display a specific phone number on patron notices. If you do not want a phone number to display on notices, leave it blank.

PH-NOTICE	
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If you run out of fields and would like to add more you may use these buttons:



Tabs

Privilege Tab:

- Expiration date is determined by the user profile to calculate the default date.
- The system enters CHANGEME as the default PIN. Enter an override if the PIN is changed.

Privilege expires:	<input type="text" value="4/19/2019"/>	<input type="button" value="🗓"/>
PIN:	<input type="text" value="CHANGEME"/>	Override: <input type="text"/>

Demographics:

- Used for gathering information and identifying particular groups in reports
- Select user categories based on your library's needs or leave blank.
- If you would like Workflows to calculate age of users, the birth date is required.
- Schools can use selections in user category 3 to identify grade levels or classes.
- The Department field can be used for homeroom and/or teacher names. If you choose to do this, it must be done consistently for reporting purposes.

User cat1:	<input type="text"/>	User cat2:	<input type="text" value="ADULT"/>
User cat3:	<input type="text"/>	User cat4:	<input type="text"/>
User cat5:	<input type="text"/>		
Department:	<input type="text" value="SMITH"/>	Birth date:	<input type="text" value="12/31/1969"/>
Language:	<input type="text" value="ENGLISH"/>	Age:	<input type="text" value="47"/>

Department can be a grade, teachers last name or a level such as Freshman, Sophomore etc.

The age will only display if there is a birthdate.

Extended Info:

- The Note field can be used for additional information about the user.
- Email notification for hold pick up and overdue notices
 - Enter email address in address 1
 - Enter E in NOTIFY_VIA field

NOTE	<input type="text"/>
COMMENT	<input type="text"/>
WEBCATPREF	<input type="text"/>
LOSTITEM	<input type="text"/>
NOTIFY_VIA	<input type="text"/>
USER_ID	<input type="text"/>
BIRTHDATE	<input type="text"/>
STAFF	<input type="text"/>

- Email notices are sent from a system generated address (mask) and cannot be replied to. Users should be instructed to allow email from the domain "mt.gov" through their blocked email filters (spam).
"sirsi@mtsc.sirsi.net"