



Training Handout:

User Registration for Public Libraries

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User Registration

Introduction

You can also find the information in this training handout on the SAILS staff Web site under: Circulation > Test your circ skills > Essential circ skills

Patron registration is an important function because when you register patrons:

- you are identifying them to the WorkFlows system as valid users,
- you are distinguishing them from other users who may have the same name or address,
- you are recording information on how to contact the patron to notify them that they have a hold available or that they owe money
- you are enabling WorkFlows to keep statistics.

Your library already has a procedure in place for obtaining patron information when the patron comes up to the circ desk and asks to get a library card. For example, your library might ask the person to fill out a registration card. Continue to follow your library's procedure.

Important: When registering a patron or modifying a patron record, *never* enter a person's Social Security Number into any field.

Before you begin

SAILS recommends that the automatic **Duplication Checking** feature *not* be used. This is because it does not work well – there are too many records in the system and there are too many incorrect records.

Find out from your circulation manager if your library uses duplication checking or not.

Checking to see if patron already exists in system

Check to see if the person has a record in the system.

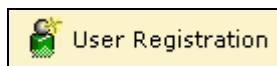
1. Click the **Display User** wizard.
2. Clicking the **User Search** helper.
3. Enter the person's last name followed by the first three letters of their first name into the **Search For** field.
4. Click **Search**.
5. Compare the information on the card that the person filled out to the information in WorkFlows.

If you determine that the person *does not* already have a record in the system, use the **User Registration** wizard to register the person as a new patron.

If you determine that the person *already has* a record in the system:

- It could be that the patron has moved from another community whose library is within the SAILS system and the person already has a SAILS library card. In that case, don't issue a new card, but use **Modify User** to update the patron's existing record. It is important that you change the Library field to your library.
- It could also be that the patron has lost his or her library card. In that case, issue a new library card with a new barcode and use **Modify User** to update the patron's existing record by entering the new barcode into the **User ID** field.
- Finally, it could be that the person has a **student card**, a **faculty card** or a **teacher card**. You can tell by looking at the Profile Name, which will be Student, Faculty, or Teacher, in **Display User** or **Modify User**. In these cases, issue the person a new public library card and register the person as a new patron using the **User Registration** wizard.

Registering a new patron



Keyboard shortcut: F 11

To register a new patron:

1. Click the **User Registration** wizard.

A dialog box titled "User Registration : Identify New User". It contains two fields: "User ID:" with an empty text box, and "Profile name:" with a dropdown menu showing "ADULT". At the bottom are "OK" and "Cancel" buttons.

2. Scan a new **library card barcode** or enter the barcode number into the **User ID** field, select a **profile name** from the drop-down list, and click **OK**.

Consult your library's guidelines as to which ages apply to each profile.

The following screen appears. It contains five tabs: **Basic Info**, **Privilege**, **Demographics**, **Addresses**, and **Extended Info**.

A screenshot of the "Unicorn Workflows" application. The "User Registration" wizard is open, showing the "Basic Info" tab. The form contains fields for Name, Id, Group ID, Profile name, Last name, first, Title, Alt ID, Group ID, Library, and Profile name. The "Profile name" dropdown is set to "ADULT". The "Library" dropdown is set to "ABOHO-HIGH". The "Allow routing" checkbox is checked. At the bottom are buttons for "Register User", "Modify", "Register Another User", and "Close". The left sidebar shows a list of tasks and users.

3. Enter the patron information into the various fields, using the standards established by SAILS on the following pages of the manual.
4. When you finish entering all the required information, review what you have entered, and click the **Register User** button.

If you should click Register User and need to add or change information later, use the **Modify User** wizard.

Basic Info tab

Last name, first

It is important to enter the name correctly because this affects how the name appears when you conduct a user search in WorkFlows.

Entering the correct spacing when registering a patron is also critical with the release of WorkFlows, Version 3.3.1, scheduled for the spring of 2010.

In this release, WorkFlows converts the **Last name, first field** for current patrons into separate **Last name, First name, Middle name, and Suffix fields**. The correct spacing tells WorkFlows where to make the separation.

Here are some examples of how to enter names:

- Last name (comma) (space) First Name (no comma) (space) Full Middle (**e.g. Smith, Joan Alice**)
- If the patron has no middle name enter **Nmn** for the middle name (**e.g. Smith, John Nmn**)
- If the patron is a Jr., III, etc. enter that designation after the patron's middle name (**e.g. Smith, John Henry III**)
- Enter prefixed names without spaces (**e.g. McDonald**)
- Eliminate punctuation marks (**e.g. OToole**)
- Enter hyphenated names as they are spelled without a hyphen (**e.g. SmithJones.**)

Correct: Smith,[space]John[space]James[space]Jr.
Example: Smith, John James Jr.

Incorrect: Smith,John[space]James[space]Jr.
Example: Smith,John James Jr.

Correct (for a hyphenated name): SmithJones,[space]John[space]James
Example: SmithJones, John James

Incorrect (for a hyphenated name): Smith[space]Jones,[space]John[space]James
Example: Smith Jones, John James

Title

Optional. This field is used for titles such as Dr., Rev., Ms., Mr., etc.

Alt ID

Do not use for now.

Group ID

Do not use for now. To be possibly added later by your library.

Library

This should default to your library. Otherwise, enter your library.

Profile Name

This defaults to the Profile Name you selected in the popup screen earlier.

Charge History Rule

Leave at NOHISTORY.

Privilege tab

Privilege Expires

This defaults to an expiration date based on the patron profile.

PIN

This is a number that WorkFlows automatically generates. Change the patron's PIN to be the last four digits of their phone number. You must enter the override code, which is SAILS. **Always** tell the patron what their PIN is.

Status

All new patron records have a status of OK.

Claims Returned

Leave this field blank.

Web Auth ID

Disregard this field.

Demographics tab

It is very important that information recorded in this field is entered correctly so that WorkFlows will be able to keep accurate circulation statistics.

User cat1

Please refer to your individual library's list of codes to know what to enter into this field.

User cat2

In this field, select the city or town where the patron resides. It is very important that this agrees with the patron's Zip Code.

There are two special cases:

- Enter MASS for a patron who lives outside the SAILS area but within Massachusetts.
- Enter NOMASS for a patron who lives from outside of Massachusetts. Consult your library's policies because NOMASS patrons may be charged a registration fee.

User cat3

Do not select anything in this field. This is different from what you may be used to doing. This field is no longer monitored for statistical purposes.

User cat4, and User cat5

Do not enter or select anything in these fields.

Department

Do not enter anything in this field.

Birth Date

This is the most important piece of information that, together with a patron's name, identifies a patron. It is not just used for statistics. Use the gadget to enter the date.

All patrons must supply their month and day of birth.

- If the patron wants to supply their year of birth, select the month, day and year.
- If the patron *does not* want to supply their year of birth, select the month and day, and select the year 1900.

Language

Leave as ENGLISH, regardless of the patron's native language.

Addresses tab

WorkFlows sends library announcement emails and mailed notices and bills using the information entered into the Primary address. When you register a new patron, the system defaults to a Primary address of Address 1. You can also select either the Address 2 or Address 3 radio button.

Although this is not a requirement, SAILS recommends that you enter the **temporary address** information into the **Address 1** fields and the **permanent address** information into the **Address 2** fields; either way is acceptable. Please ask your circulation manager what is customary for your library.

- If you want email announcements or mailed notices to go to what is listed in Address 1, then select the Address 1 Primary radio button.
- If you want email announcements or mailed notices to go to what is listed in Address 2, then select the Address 2 Primary radio button.

Do not use Address 3.

If the post office returns a notice or bill to your library with no forwarding address, add UNDELIVERABLE to the **Street** field.

Street

Enter the patron's street address. According to United States Postal Service examples, do not use punctuation such as periods and commas.

Use the following abbreviations exactly as they appear below:

| Abbreviation (enter as it appears below in upper case with no punctuation) | Word (do not use) |
|--|-------------------|
| | |
| AVE | Avenue |
| BLVD | Boulevard |
| CTR | Center |
| CIR | Circle |
| CT | Court |
| DR | Drive |
| EXPY | Expressway |
| HTS | Heights |
| HWY | Highway |

| Abbreviation (enter as it appears below in upper case with no punctuation) | Word (do not use) |
|---|--------------------------|
| IS | Island |
| JCT | Junction |
| LK | Lake |
| LN | Lane |
| MTN | Mountain |
| PKWY | Parkway |
| PL | Place |
| PLZ | Plaza |
| RDG | Ridge |
| RD | Road |
| SQ | Square |
| ST | Street |
| STA | Station |
| TER | Terrace |
| TRL | Trail |
| TPKE | Turnpike |
| VLY | Valley |
| WAY | Way |
| APT | Apartment |
| RM | Room |
| STE | Suite |
| N | North |
| E | East |
| S | South |
| W | West |
| NE | Northeast |
| NW | Northwest |
| SE | Southeast |
| SW | Southwest |
| APT | Apartment |
| BLDG | Building |
| FL | Floor |
| STE | Suite |

| Abbreviation (enter as it appears below in upper case with no punctuation) | Word (do not use) |
|--|-------------------|
| RM | Room |
| DEPT | Department |

Post Office Boxes

When the patron provides a **post office box number** and a **street address**, make sure that the place where the patron wants the mail delivered appears on the line **immediately above** the City/State line and that the ZIP Code or ZIP+4 code corresponds to that address.

For example, if the person has both a street address and a post office box and he or she wants mail delivered to the P.O. Box:

- enter the street address in the first street field, and
- enter the post office box in the street field above the City/State field.

Always abbreviate Post Office Box as P.O. Box (with no spaces in P.O.).

City/State

Enter the City/State using this format:

- City or town (comma) (space) state

Always use the standard 2-digit postal abbreviations for states. Never use Mass. or spell out the name of the state.

Here are some examples of correct spacing:

Correct: New[space]Bedford,[space]MA
Example: New Bedford, MA

Incorrect: New[space]Bedford,MA
Example: New Bedford,MA

Zip

Enter the 5-digit or 9-digit zip code.

Homephone

Enter the patron's home telephone number using this format:

- Area code (hyphen) 3 digits (hyphen) 4 digits. For example, 508-555-1212. You must enter the patron's area code.
- If the patron does not want the library to call, enter two spaces and the word NOCALL after the telephone number. Example: 508-555-1212[two spaces]NOCALL. This serves as a reminder to the circulation staff.
- If the patron does not want the library to call, but would like to get the emailed notices, enter the word EMAIL after the telephone number. Example: 508-555-1212[two spaces]EMAIL
- From now on, *do not* enter NOEMAIL after the telephone number.
- If the patron uses their cell phone for their home phone, enter it into the Homephone field.

Workphone

Optional. Use the format for Home Phone above for entering this information. If the patron has an extension, enter "EXT" after the phone number followed by the extension number.

Email

It is extremely important that email addresses be entered into the EMAIL field correctly; not doing so has resulted in server troubles because the email field is what is read when email notices are sent.

Note: If the patron does not want to receive email of any kind (including announcements of book sales, or hold, overdue, or billing notices), then do not enter an email address.

A valid email address has a user name, an "@" sign, and a domain (such as "comcast.net"). For example, kjs@domain.org is the email address of a person with the username "kjs" who has an account with "domain.org".

Here are some requirements on the entering of the email address.

You can never have the following in an email address:

- spaces
- two @ signs
- just text with no @ sign
- comma (",").

The only special characters allowed in an email address are:

- @ (at sign)
- . (period)
- _ (underscore)
- - (hyphen)

Examples of typos that have been found in the EMAIL field include:

cmp1103@tmail.com,
yo_ama-IZ@yahoo,com
msloan7551@aol,com
msuarez,@wheatonma.edu
ritinha37,@aol.com
rockstar03@hotmail,ail.com
queenof the mafia@@gmail.co,

This is what they should have looked like:

cmp1103@tmail.com
yo_ama-IZ@yahoo.com
msloan7551@aol.com
msuarez@wheatonma.edu
ritinha37@aol.com
rockstar03@hotmail.com
queenofthefafia@gmail.com

If the patron is changing their email address, ask them to write it out for you to copy.

A note about temporary local addresses: If the patron is using a temporary local address, use the Address 1 fields for the local address and the Address 2 fields for the permanent address. For example, if the patron is a summer resident of your community, enter the local address in Address 1. Do not use Address 3.

Extended Info

If you enter a note or a comment into the **Note** or **Comment** field, it will appear in the Notes pop-up in Display User or Modify User. Notes and Comments are for other staff members to see, and can include information such as "Signed Internet form - 7/1/09" or "Library card found in library."

When you have finished entering patron information

When you have finished entering patron information, review what you have entered, and click the **Register User** button.

Frequently Asked Questions



Are patrons required to obtain a new card if they move to your community from another community within SAILS?

No, they may continue to use their old patron card.

1. Have the patron fill out a new registration form.
2. Search for the patron record, or if the patron has the old card, scan in that barcode, and review their existing patron record. Make updates as needed in **Modify User**.

Pay particular attention to:

Basic Tab

Name – we often see people with a new last name

Profile – are they older and need to be changed out of JUV or YA?

Library – change to your library

Demographics Tab

User Cat1 – change to match one of your library's UserCat1 entries

User Cat2 – verify the city or town that they now live in

Extended Info

Are there old messages which may now be cleaned up? If so, take the opportunity to do so.

Remember:

- If you don't use the correct **Profile**, your patron may be blocked from using the OverDrive Digital Library collection or be given the wrong loan periods for materials.
- If you don't change the **Library** in the Basic Tab, your library's copies won't be held for this patron first.



Can a patron who has a card from outside the SAILS network but within Massachusetts get a SAILS card?

Yes. Do the following:

1. Have the patron complete the standard patron registration form.
2. Verify the patron's home address using whatever means of identification normally used for residents.
3. Create a new user record using the barcode from the patron's home library card.
4. Select MASS in User Cat2.
5. If the person does not have a library card at their home library or their library does not use barcodes, issue a SAILS card.



Can students from colleges or schools use their library card in a public library?

No, only public library cards are accepted at public libraries.



What do you do if a patron has lost his or her card?

1. Use the **Modify User** wizard.
2. Issue a new card and scan the new barcode into the **User ID** field.
3. Verify all the patron information to make sure that it is current.



How do we indicate that the patron no longer wants to receive any type of email?

Delete the email address from the patron record. Add a note about the deletion in the Notes field.