



Patron Registration

Symphony Workflows

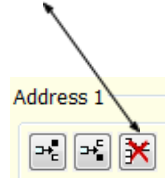
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Introduction

This manual is intended primarily for public library staff members who are manually entering or updating patron records. Academic and K-12 libraries are encouraged to use the patron load option whereby student records are loaded into the system by SAILS staff members and students are identified by student id. K-12 libraries that prefer to manually enter student records should follow the abbreviated steps listed in the Student Record section.

IMPORTANT - If you are deleting information from a field such as an email address don't use the backspace to remove the information. Use the Delete Row helper.



Step by Step Procedures

1. Search the system by name or phone number to see if the person already has a card.
2. If the patron does not have a record in the database, use the **User Registration** wizard.
4. Scan in the new patron barcode
5. Click on each tab as you enter the data and complete the required files. Do not click the **Register User** button until the record is complete.
6. When you have finished entering patron information, review what you have entered, and click the **Register User** button.

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

Basic Info tab

First Name / Middle Name / Last Name / Suffix fields

Enter the appropriate part of the name in these fields as listed on their legal identification.

Here are some examples of how to enter names:

- If the patron has no middle name enter **Nmn** in the **Middle Name** field.
- If the patron is a Jr., III, etc., enter that designation in the **Suffix** field. If there is no suffix, leave this field blank.
- Enter prefixed names without spaces (for example: McDonald).
- Eliminate punctuation marks (for example: OToole).
- Enter hyphenated names as they are spelled without a hyphen (for example: SmithJones).

Preferred Name

This field contains the user's preferred name or nickname, up to 25 characters in length. Entering a preferred name in this field will also make it searchable in Workflows. Here are some reasons you might want to enter a preferred name:

- For patrons who are transgender and have not updated their legal name to their preferred name.
- For patrons who go by their middle name or some other name that is not their legal name.
- In cases where you want to make a name searchable in the patron record to make it easier to find the patron. For example, staff could enter both parts of a hyphenated name to make both searchable.

Use Preferred Name

Select this box to display the user's preferred name and it will replace the first name in Workflows, Enterprise, patron notices, and other reports. You should only select this box if the preferred name is the first name and should not select it if the only reason you entered the preferred name was to make it searchable.

Title

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

Alt ID

The patron may request a unique Alternate ID to speed up logging into Enterprise and the SAILS Mobile App.

Group ID

The group ID is an optional, free-text field that can be used to link all users belonging to a named group such as a family or department. At a workstation, you can display a list of users with the same group ID. This is not the same thing as User Groups which link patron

delinquencies. Typically public libraries enter a phone number.

Library

This should default to your library. Otherwise, enter your library. This information is used by the system to define the patron's library of choice. It does not have to match where the patron lives. It is the default pickup location although patrons may change the pickup location when placing holds. Patrons with your library in this field will have priority when holds are being filled.

IMPORTANT – if you are updating a patron's card that they had at another library they will need to go into Enterprise and change their default pickup location. This is not done automatically.

Profile Name

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

Charge History Rule

This defaults to NOHISTORY. Patrons may choose to maintain a list of items checked out. These lists are viewable in Enterprise. You may update the patron's record to ALLCHARGES and patrons may opt into this service when they log into Enterprise.

IMPORTANT – Charge history records cumulate for every checkout done by the patron. The system does not have a limit and these histories are not automatically pruned or deleted. Patrons with too many charge history records can experience delays at checkout or logging into Enterprise. SAILS can selectively remove a patron's charge history and provide a list of titles prior to deletion.

Privilege tab

Privilege Expires

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

IMPORTANT – If you are updating a patron's record that was created using the Online User Registration form the expiration date must be updated. The recommended method for doing this is using the Renew Privilege wizard after the record has been updated. If the record isn't completely updated you may receive a message that the patron has reached the limit of charges allowed.

PIN

This is a number that Symphony 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. This number is automatically incremented every time a patron has a claimed returned item. You can manually change this using the override of SAILS.

Web Auth ID

Disregard this field.

BLUEcloud Staff ID

Disregard this field.

Demographics tab

It is very important that information recorded in this field is entered correctly so that Symphony Workflows will be able to keep accurate circulation statistics. If you enter an incomplete record into the system, your monthly and annual transactions statistics will be incomplete.

User cat1

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

User cat2

Select the city or town where the patron **RESIDES**. It is very important that this agrees with the patron's Zip Code. This **must** be updated if the patron has moved to a new community.

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. Local NOMASS profiles must be used if there is no fee. Those patrons are then limited to your library. See the [Circulation Policy Manual](#) to view the complete policy regarding out of state borrowers.

User cat3

User cat 3 lists five options to choose from the drop down list. Select the patron's preferred contact method.

- **EMAIL** – system generated email.
- **SMS** – patron will receive a text message to a phone, for holds and overdues, not bills. Bills will still be printed.
- **VOICE** – patron will receive a system generated phone call for holds and overdues. Bills will still be printed.
- **NONE** – patron is opting out. The library may choose to contact them at the local level if they wish. The system will not contact them for holds and overdues. Bills will still be printed.
- **UPDATE** – patron record needs to be updated to indicate a contact method. (When registering a patron for the first time this should not be used.)

User cat4

User cat4 lists 5 options to choose from the drop down list. These offer special patron statuses that might affect borrowing privileges or notice generation

- **CERT** – patron lives in a community that shares a zip code with a decertified community. For example – Buzzards Bay could be either Wareham or Bourne.
- **DECERT** – patron has a mailing address in certified community but actually lives in a decertified community
- **POBOX** – patron has a mailing address in a decertified community but actually lives in a certified community.
- **UND** – Undeliverable. (When registering a patron for the first time this option should not be used.)
- **VISITOR** – Part time resident from certified community

User cat5

- **INTERNET** – Optional to indicate patron has permission to use public Internet computers
- **NOFAVS** – Patron does not wish to receive Favorites email notices. This is separate from the New Titles Alerts – it is a holdover from an e-Catalog option that is not supported in Enterprise.

User cat6– cat12 – *not currently in use*

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. Use the gadget to enter the date.

All public library patrons must supply their month and day of birth. Network policy does not require that a patron provide his or her year of birth although this is preferred.

- If the patron wants to supply their year of birth, select the month, day and year.
- If the patron *refuses* to supply their year of birth, select the month and day, and select the year 1900.

Language

This field can be used to track statistics based on the patron's primary language. If the network were to ever send multilingual HTML notices, this field could be used to determine which notices should be sent.

Addresses tab

Symphony Workflows sends notices and bills using the information entered into the Primary address. Symphony Workflows defaults to a Primary address or Address 1. You can also select Address 2.

Although this is not a requirement, SAILS recommends that for a patron who has two addresses, 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 to go to what is listed in Address 1, then select the Address 1 Primary radio button.
- If you want email 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. It is important that it be entered all in capital letters. Be sure to update USERCAT4 to UND at the same time.

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
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
VLV	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
RM	Room
DEPT	Department

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 s/he 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.

PHONE1

Use PHONE1 to indicate the patron's primary phone number regardless of what kind of phone it is. The automated calls use this field to contact patrons for patrons who opt in for this service.

Enter the phone number as all numbers. Don't put in a character to separate area code.

Put two spaces after the phone number then indicate which method of contact they use. Use the same language found in the Usercat 3 field – EMAIL, SMS, VOICE. This is not used by the system to generate notices but is merely informational for staff.

Homephone *Optional*

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.
- *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, 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@hot,ail.com
queenof the mafia@@gmail.co,

This is what they should have looked like:

cmp1103@tmail.com
yo_ama-IZ@yahoo.com

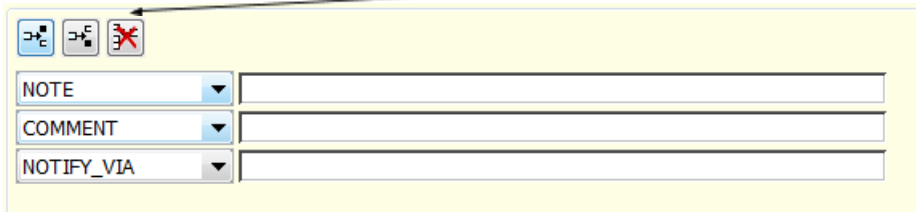
msloan7551@aol.com
msuarez@wheatonma.edu
ritinha37@aol.com
rockstar03@hotmail.com
queenofthefafia@gmail.com

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

Extended Info tab

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 Taunton” or “Library card found in library – 10/1/16 Midboro.”

IMPORTANT – Every note or comment must be dated. Include your library’s code. If a comment or note is no longer relevant it should be deleted. Use the Delete Row Helper.



The screenshot shows a form titled "Extended Info tab" with a yellow background. At the top left, there are three icons: a blue square with a white 'E', a grey square with a white 'F', and a red square with a white 'X'. Below these icons are three rows of input fields. The first row is labeled "NOTE" with a dropdown arrow. The second row is labeled "COMMENT" with a dropdown arrow. The third row is labeled "NOTIFY_VIA" with a dropdown arrow. A red arrow points from the text "Use the Delete Row Helper." to the red 'X' icon.

SMS Notice Contact Info Tab

This is a tab in the patron's record and must be filled out in order to have our patrons receive SMS (text) notices. Usercat3 of SMS and a phone number in PHONE1 is not enough to enable the service for a patron.

Tab may appear blank when opened the first time for a patron.

1. Click the button that looks like a sheet of paper to add a phone line to receive SMS notification.
 - Label – Enter the name of the person the phone belongs to.
 - Phone Number – Enter only the numbers
 - Overdue Notice – Place a check mark
 - Hold Notice – Place a check mark
 - Manual Message - optional
2. Click Save when the record has been updated.

***Note: If patrons are to receive sms notices, you must put checkmarks in the Hold and Overdue options. We won't be generating other notices via this method.**

User Groups

Library staff can create a **family card**, also known as a **user group** in Symphony WorkFlows, and can assign patrons to that family card. Library directors must contact SAILS before using this feature.

The advantage of the family card is that you can view all bills of a group at one time and that when you go to pay the bills, Symphony WorkFlows presents them all in one place.

It is up to the library director and circulation staff (along with the patron, if the library wishes) to decide who is linked and who is not linked. For example, it might be a benefit to the library to link the members of a family or of a local institution/group to ensure payment by someone in the group if one member tends to run up a bill.

1. Enter a name for the family card in the **Group Name** field. Use the **telephone number** as a family card name. By entering a name here, you are creating the new family card.
2. If the family card already exists, search for it by using the gadget.
3. Select L or NL (for linked or not linked) from the **Responsibility Policy** drop-down list.
4. *Do not* check any of the check boxes.

K-12 Patron Registration

Basic Info tab

First Name / Middle Name / Last Name / Suffix fields

Enter the appropriate part of the name in these fields.

Preferred Name

This field contains the user's preferred name or nickname, up to 25 characters in length. Entering a preferred name in this field will also make it searchable in Workflows. Here are some reasons you might want to enter a preferred name:

- For patrons who are transgender and have not updated their legal name to their preferred name.
- For patrons who go by their middle name or some other name that is not their legal name.
- In cases where you want to make a name searchable in the patron record to make it easier to find the patron. For example, staff could enter both components of a hyphenated name to make both searchable.

Use Preferred Name

Select this box to display the user's preferred name and replace the first name in Workflows, Enterprise, patron notices, and other reports. You should only select this box if the preferred name is the first name and should not select it if the only reason you entered the preferred name was to make it searchable.

Here are some examples of how to enter names:

- If the patron has no middle name enter **Nmn** in the **Middle Name** field.
- If the patron is a Jr., III, etc., enter that designation in the **Suffix** field. If there is no suffix, leave this field blank.
- Enter prefixed names without spaces (for example: McDonald).
- Eliminate punctuation marks (for example: OToole).
- Enter hyphenated names as they are spelled without a hyphen (for example: SmithJones).

Alt ID – Optional

You may enter the Student ID in this field. This field must be unique so contact SAILS before entering information in this field.

Group ID – Optional

You may enter the student's home room in this field

Library

This should default to your library.

Profile Name

This defaults to the Profile Name you selected in the popup screen earlier. You will only see profiles in use in your school.

Charge History Rule

This defaults to NOHISTORY. Contact SAILS staff if you want to track students' reading history.

Privilege Tab

Privilege Expires

This defaults to an expiration date based on the patron profile. SAILS staff updates expiration date based on the year in which the student will be leaving the school or school district. Do not change the expiration.

PIN

This is a number that Symphony Workflows automatically generates. Schools typically assign 9999 as the pin although some institutions have different guidelines. 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. This number is automatically incremented every time a patron has a claimed returned item. You can manually change this using the override of SAILS.

Web Auth ID

Disregard this field.

BLUEcloud Staff ID

Disregard this field.

Demographics tab

User Cat1

Enter the current grade for the student. You will only see grades appropriate for your building.

You do not have to enter any other information in the student records.

Addresses Folder - *Contact SAILS if you wish to send notices via email or text message*

Zip Code

Enter the student's homeroom in this field. Be consistent in how this is entered. We can run end of term reports for you sorted by homeroom based on this field.

Frequently Asked Questions

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

It is recommended that patrons receive a new card with a barcode issued by your library

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 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.