

CIRCULATION MANUAL

PATRON RECORDS

Searching for a Patron

1. Click on the SEARCH BOX
 - a. Index Box displays search modes-click on arrow to pull down list of choices.
 - i. Click on one of the choices and type in the information in the box to the right. For name type last name then first.
 - ii. Hit enter or click on SEARCH
 - iii. A list of names will display.
 - b. Click on EXPAND ALL to view addresses, p-types and library.
 - c. If name is not in the database, a highlighted line displays where it would be in the list.

Creating a NEW Patron Record

1. Click on the NEW icon at the top right of screen
2. A template has been created to help you navigate through this process.
3. The template will display with a box overlaid in the middle of it
 - a. These are the fixed fields. Only certain information will be accepted into these fields. How you get the information will be discussed as you navigate the template.
 - b. To move from one box to the next hit enter or click NEXT.
 - c. If you make a mistake you cannot correct it until you have completed the entire registration.
 - d. To correct a mistake before field is entered, you can backspace, click and drag mouse over mistake, or double click on error to delete it.
 - e. You can type in data where red cursor displays.
 - f. Libraries should prepare lists of their most frequently used codes.
4. Navigating the template to create a patron record.
 - a. EXPIRATION DATE:
 - i. Type "t" for today's date and backspace to enter final digit for the year (2 years hence for most libraries)
 - ii. Type in mm/dd/yy for students, teachers, etc.
 - iii. Typed "b" to leave field blank
 - iv. There is no address check function. You must put in a date to expire if you want to check address, phone, etc. on a regular basis.
 - v. If you double click in the box a calendar will display.
 - b. PATRON CODE 1 Age
 - i. Enter code letter for age range (See cheat sheets)
 - ii. Double click in box to see list of choices.
 - c. PATRON CODE 2
 - i. Leave Blank

- d. PATRON CODE 3
 - i. Residence: enter code # for RI town, 0 for out of state, 1 for MA.
 - ii. Double click in box to see list of choices.
- e. PATRON TYPE
 - i. Type in code # (See cheat sheets)
 - ii. Double click in box to see list of choices
- f. BIRTH DATE
 - i. Type in mm/dd/yy
- g. HOME LIBRARY
 - i. This should be filled in for each library.
 - ii. Type in 2 letter code for your library or double click in box to see choices
- h. PATRON AGENCY
 - i. This should be filled in for each library
 - ii. Type in code for your library or double click in the box to see choices.
- i. NOTICE PREFERENCE
 - i. Type in code: z-email, p-phone, a-print
- j. PATRON CODE 4
 - i. Used for college, school, agency, etc.
 - ii. Type in code or double click in box for choices

PATRON MESSAGE and MANUAL BLOCK are not part of the template at this time.

The following fields will display at the top of the screen.

- k. BARCODE
 - i. Laser or type in number.
- l. PREFIX
 - i. Type in if needed (Father, Rev., Dr., etc.)
- m. NAME
 - i. Type last name comma space then first name space then middle name or initial.
- n. SUFFIX
 - i. Type in if needed (Jr, II, PPL Teacher Card, etc.)
- o. ADDRESS 1
 - i. Type in # and Street or Box # on line 1
 - ii. Type in City, State and Zip Code on line 2
- p. ADDRESS 2
 - i. Enter as above if needed or just click next to move on.
 - ii. Third Address must be typed in Notes.
- q. TELEPHONE 1
 - i. Type in 10 digits with hyphens (401-123-4567)
- r. TELEPHONE 2
 - i. Same as above
- s. EMAIL ADDRESS – Type in

- t. GUARDIAN
 - i. Type in name (First name space last name)
- u. UNIQUE ID – License #
 - i. Type in digits first (1234 RILIC)
- v. MESSAGE
 - i. Free text that displays in box when card is scanned.
 - ii. Only the first message entered will display. If more than one message put on the same line.
- w. NOTES
 - i. Free text that displays in the patron information box when card is scanned.
 - ii. Use for 3rd address, to indicate internet permission, etc.

Click on “SAVE” and “CLOSE” icons to complete registration.

Pin numbers must be entered by the patron at an OPAC. Staff cannot see the pin #, it is encrypted in the record. We can only delete the pin # so the patron can choose another one.

5. Duplicate Checking

The system will automatically check for duplicate entries in the patron ID index and/or the Barcode index to prevent the creation of duplicate patron records. If the system finds a duplicate record, it will display in a separate window. If the system finds more than one duplicate record, it will display a browse list of the records.

To replace the record you are creating with the record that has been found, choose the Use Patron Record button.

Editing a Patron Record

1. Retrieve the Patron Record.
2. Click on EDIT to open the record
3. The cursor will appear in the first fixed length field. You can use the tab key to move through the fields. The cursor will move to the variable length fields when you reach the last fixed length field.
4. You can also single click in the field you want to change.
5. You can click on a variable length field and make your change.
6. Inserting a variable length field
 - a. Click on INSERT icon on the toolbar
 - b. A drop down menu will display with the names of the fields.
 - c. Enter the data and click OK or hit enter.
 - d. The inserted field may be out of order. The fields will be arranged in order when you save the record. You can also re-order the fields by choosing the REFRESH command from the VIEW menu.

Deleting a Patron Record

1. Retrieve the Patron Record.
2. Click on the EDIT icon on the toolbar.
3. Click on the DELETE icon on the toolbar.
4. You will be prompted to verify this is the action you want.
5. A deleted patron record cannot be restored.
6. Only a clear patron record can be deleted.

Linking Patron Records

1. Retrieve Patron Record.
2. Click on LINKED PATRONS tab.
3. Choose the LINK button. A patron search window will open with a drop down menu.
4. Choose an option and search. If there is not an exact match, a browse list will appear.
5. Choose a patron from the list and click on SELECT.
6. The patron is added to the family group and the LINKED PATRONS tab is updated.
7. To remove a patron from the family group, highlight the patron to be removed and choose the UNLINK button.
8. You will be prompted to verify the action.