Registering Patrons

To register a new patron, we will begin by accessing the “Circulation” menu and selecting “Register Patron.”
User Identification

The first step to registering a patron is to scan or enter the barcode from the library card you are assigning the new patron. This can be done manually or using a barcode scanner.

After entering the barcode, the “Username” field will automatically populate with the barcode. This can be changed by the circulation staff, if the patron has a username they would like to use, or it can remain the barcode.

Also be sure to give the patron the 4-digit “Password” to the right of the password box. This will be their temporary password to access the “My Account” section of the Online Catalog.
Staff should continue populating the Name, Birth date and Identification fields.

After completing all of the required fields, click “Forward>>”
Contact Info

The following screen will collect the patron’s contact information

Enter the patron's email (required for pre-overdue notices and hold messages) and any available phone numbers. The home library will default to the library where the patron is registering.

After completing all of the fields, click “Forward>>” to continue on to the patron’s address information.
From the “Addresses” screen enter the patrons address. If they have multiple addresses they would like to be contacted at, you can click “Create a New Address” to add alternate addresses.

After completing, click “Forward>>” to continue on to the Groups and Permissions editor.
Groups and Permissions

From the Groups and Positions interface circulation staff can choose the Profile Group for this account. Profiles include Patron (Friend, Non Resident, Reciprocal Barrower, etc.) or Staff (Circ1, Circ2, Admin, etc.) Permissions for each of these groups will be decided by the Evergreen Indiana consortium. It is also important to note that only supervisors designated by Evergreen Indiana will be able to create and edit staff Profiles.

From Groups and Permissions you can also choose to apply filtering to Internet Access, and place “Alert Messages” which can only be seen by other staff.
Registering Patrons

If this user is an adult who wishes to be the “lead” account, you can set the “Family/Group Lead” account flag on this account.

After completing the required fields click “Forward>>”

**Statistical Categories**

Statistical Categories will be decided on a library-by-library basis.

Circ staff can chose what StatCat’s to place patrons into based on guidelines laid out by their particular library.

After completing the required fields click “Forward>>”
Surveys

Surveys can be set on a Consortium wide basis, or on a library by library basis.

From this screen, Circ Staff can record patron's answers to any surveys in progress at that time.

After completing the required fields click “Forward>>”
Finishing

The last step to registering a patron is “Finish”

Staff can view and/or print a summary of the patron’s registration, or they can choose to Save, Clone or Cancel the registration.

Typically, “Save User” will be the choice. One circumstance where you might “clone” a user is if a mother and daughter come in to receive a library card. You can create the mother’s account and “clone” her account to automatically populate fields like addresses and phone numbers to save time. Cloning also “groups” all clones of that particular user as “children” belonging to the lead account.
After clicking “Save User” you will see the following message, signifying that the user has been created successfully.

![Image of message box with User update succeeded]

The page at http://demo.gapines.org says: