

ANATOMY OF A PATRON RECORD

ALL-CAPS ALL THE TIME!!! These are the ONLY fields that should be used.

- 1) **Basic Info Tab**
 - a. **First Name, Middle Name, Last Name**
 - b. **User ID**
 - c. **Profile**
 - d. **Library**
 - e. **Charge History**
- 2) **Privilege Tab**
 - a. **Renew patron card**
 - b. **Set PIN**
 - c. **Bar patron**
 - d. **Edit # of Claims Returned items**
- 3) **Demographics Tab**
 - a. **User Categories**
 - b. **Birthdate**
 - c. **Language** (which doesn't seem to affect anything now but might at some point)
- 4) **Address Tab**
 - a. **Phone**
 - b. **Street**
 - c. **PO_BOX** (when applicable)
 - d. **City/State**
 - e. **Zip**
 - f. **Email**
 - g. **Care/Of** (when applicable)
- 5) **Extended Info**
 - a. **Notes, Comments**
 - b. **Lost Item** (auto-populated. Should remove titles if item comes back)

Basic Info Tab:

Name:

- Should be entered as written on ID
- Do NOT use Preferred Name
- No punctuation after Middle Initial

User Profile: See separate handout.

The User Profile, combined with the User Home Library and the Circulation Map, controls how the patron interacts with the circulation system.

Profile determines:

- Whether patron *could* get billed
- How long before card expires (IF it expires)
- Whether patron can renew card online
- Checkout limit
- Hold limit

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- Overdue limit
- Block limit
- Whether checkout increases the checkout count on an item

User Library:

- Determines whose Local Hold items a patron can place holds on.
- Determines which library gets \$\$ for UI bill or fines paid online in the catalog.
- Determines your statistics for # of patrons

Charge History:

- Is off (set to NOHISTORY) by default when registering a patron
- Can be controlled by the patron in Enterprise or by staff in WorkFlows
- Only records an item once it has been returned.
- Only options are ALLCHARGES or NOHISTORY.
- Can only be erased by Melissa or I

Privilege Tab:

- **Renew patron card** – Be sure to check address, phone & UserCats 1&2 before renewing
- **Change PIN** – We are sticking with 4-digit PINs for now.
- **Bar patron** – for special cases
- **Edit # of Claims Returned items** – If items actually were returned or got paid for, you can reset this #.
- **Most of these fields require an override**

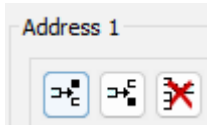
Demographics Tab:

User Categories:

- **User Category 1**
 - Critical for funding and statistics.
 - Municipality in which the patron lives.
 - Worth double-checking periodically. Like when cards get renewed.
 - Let Karla know if you come across patrons who live in area w/o a code
- **User Category 2**
 - County in which the patron resides
 - Used for statistics and funding
 - Used for spot-checking: is address and Ucat1 in this County?
- **User Category 3**
 - Gender
 - Not critical for anything anymore
- **Birth Date**
 - Important for identification/duplicate checking
 - Important for UMS to identify minors and send collection notice to parents
 - Important for libraries that allow parents to restrict children's card

Address Tab:

Add Below, Add Above, Remove lines using the gadgets. Must use Red X gadget to remove all data in a field—esp email.



- **Phone**
 - Used for looking up patron/Duplicate Checking
 - Used for phone notices
- **Street**
 - Mailing Address
 - Used for notices (esp bill, collection agency)
 - Used for Duplicate Checking
 - Used for verifying User Cat1 (Usually)
- **PO_BOX**
 - When applicable
- **City/State**
 - No punctuation
 - Use official 2-letter state abbreviation
- **Zip**
 - Must include 5 digit zip code
 - May include +4 zip. XXXXX-XXXX format. No spaces.
- **Care/of**
 - Optional

Remember that, if used, any-and-all these fields will appear

- On Notices
- In the public catalog
- To staff at time of checkout

Extended Info Tab:

- **Notes**
 - Do not appear in the catalog
 - Should be as discreet and brief as possible while providing enough info to inform other staff
 - Should be cleaned out if/when issue resolved
 - Are NOT searchable
- **Comments**
 - Are the same as Notes except searchable
- **LostItem**
 - Are the same as Comments, except populated automatically by the system