

MONTANA SHARED CATALOG PATRON REGISTRATION

Follow the Post Office address recommendations, which include the following:

- 1) Enter data in ALL CAPS.
- 2) Do not use punctuation.
- 3) Exceptions to the above are:
 - a hyphen in full (+4 digits) zip codes (59803-4799)
 - Use address abbreviations wherever possible (AVE ST LN DR RD)

WORKFLOWS PATRON REGISTRATION (data entry issues)

- *Always check through “User Display” to see if the user already has a card.*
- *Double Check User Profile to ensure it is in use by your library.*

- 1) **Basic Info:** Enter patron’s name as follows:
 - i. Title: Optional.
 - ii. First Name: Enter first name in all caps.
 - iii. Preferred Name: Optional (this can be a nickname or alternate name for the user).
 - iv. Middle Name: Enter middle name or initial. Leave blank if no middle name.
 - v. Last Name: Enter last name in all caps
 - vi. Suffix: Enter Sr. or Jr. or III for example or leave blank.

Here is an example of registration data entry:

JOHNSON
JOHN
J
SR
383 DEWEY AVE
ANYTOWN MT
59808-2156
emailaddress@notrealemail.net

- Alternate ID: 6-10 character ID determined by patron to access their eLibrary account; may be used in lieu of library card number.
 - Group ID: Optional. Used to link users belonging to a named group, family or department. Some libraries enter phone number, in format (000)000-0000 with no spaces, for use by automated dialing.
 - Library and Profile Name: Ensure your library and user profile are correct. Use the wizard properties to set default entries (right click wizard name, edit/save properties)
- 2) **Privilege Tab:** Expiration date is determined by the user profile to calculate the default date. The system enters CHANGEME as the default PIN. You must enter an override if the PIN is changed.
 - 3) **Demographics:** Used for gathering information and identifying particular groups in reports and statistics. Select user categories based on your library’s needs or leave blank. Birth date is optional but if would like Workflows to calculate age of users, the birth date is required. Schools can use selections in user category 3 to identify grade levels or classes. The Department field can be used for homeroom and/or teacher names.
 - 4) **Addresses** (hints)
 - All mailing addresses (incl. PO BOXES) go in address 1, the “Primary” address.

- If patron has a mailing address that is different from their physical address, use address 2 for the physical address. Address 2 might also be used for a permanent out-of-state address, if patron has a temporary in-state address.
- Include apartment/suite numbers on same line as the street address. Too many lines in the address can tamper with the alignment of printing on overdue notices.
- Use “Phone” or “Dayphone” for cell phone if different from home phone. Use Dayphone or Workphone can be used interchangeably or left blank.
- Use “PH-NOTICE” if you wish the phone number to display on notices sent to the user.
- Email addresses can be entered in the field after ZIP.

5) **Extended Info:**

- The “Note” field can be used to amplify information about the user.
- The “Staff Note” field can be used for info that the patron can’t see. It is also used by those libraries with Debt Collect enabled for updates made to the collection agency account. Some libraries enter staff initials here or in the Demographics department field.
- **IMPORTANT: EMAIL notification for hold pickup or overdue notices.**
 - Enter email address in address 1
 - **Enter E in NOTIFY_VIA** field.
 - Email notices are sent from the following address:
Montana_shared_catalog@mt.gov. This address is a system generated address (mask) and cannot be replied to. Users should be instructed to allow email from the domain “mt.gov” thru their blocked email filters (spam).