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Slide 1

Slide notes: Click to add notes for the selected slide

Text Captions: Montana Shared Catalog

Tutorial on

Registering a New User



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Slide 2

Slide notes: In this tutorial you will learn how to register a new patron with the Symphony Work-flows System. Click on the Circulation tab, then select and open the Users button by clicking on it. This wizard provides many options for dealing with patron information. Select New User.



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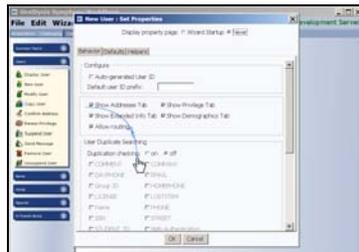
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properties

Slide notes: Here Right click on the New User wizard to bring up this menu and click on properties.

Text Captions: Right click the New User wizard to check properties.



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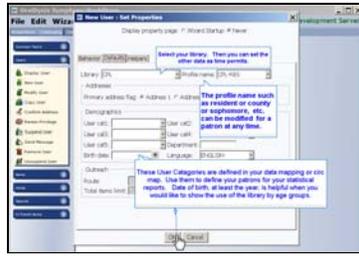
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Slide 4

Slide notes: The "behavior" tab is standard, usually with no changes, but make sure that the "duplication checking" is on, with at least the name checked. Next click on the defaults tab.



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Slide 5

Slide notes: Here selecting your library is very important. This defaults page doesn't need to be redone each time, but set up your library's acceptable defaults. later, they can be adjusted for the patron's specific registration information. Each of these will be discussed through-out the tutorial.

The profile name is necessary for circulation reports. This could be resident, county or freshmen or any other parameter that identifies your patron. A suggestion made by the group, was to limit profile names and use the user categories in demographics to really define your patrons. The user categories can be set patron by patron at a later date. Click OK.

Text Captions: These User Categories are defined in your data mapping or circ map. Use them to define your patrons for your statistical reports. Date of birth, at least the year, is helpful when you would like to show the use of the library by age groups.

The profile name such as resident or county or sophomore, etc. can be modified for a patron at any time.



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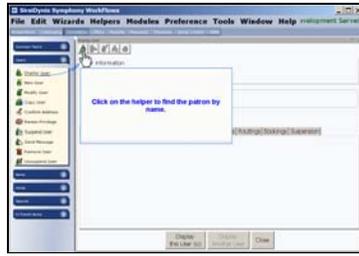
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Slide 6

Slide notes: The first step after filling out the registration form is to Click on The Display User wizard just above the new user, to search the patron database to make sure the user isn't already registered. if you have the duplication checking set in your defaults, you could skip this step.

Text Captions: Check to make sure the user isn't already registered.



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Slide 7

Slide notes: Still in Display User, Click on the helper to find the patron by name.

Text Captions: Click on the helper to find the patron by name.



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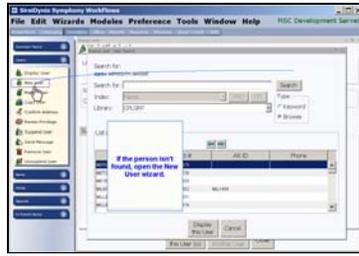
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Slide 8

Slide notes: The User Search screen lets you type in the name to see if they are already in your database. Click on Search. If they are already registered a screen with their information pops up.



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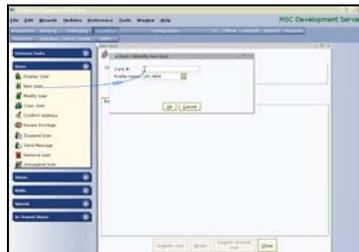
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Slide 9

Slide notes: If the person isn't found, open the New User Wizard.

Text Captions: If the person isn't found, open the New User wizard.



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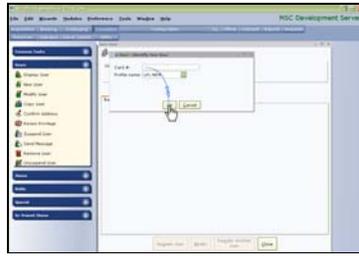
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Slide 10

Slide notes: Scan or type in a new barcode for the patron. If you are registering the patron on the fly, just leave the profile name as default. If you are registering the complete data, change the profile as appropriate for your library, using the selection gadget.



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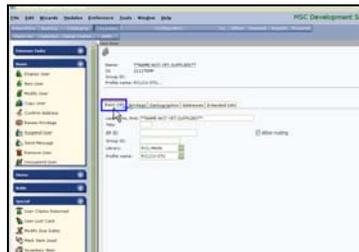
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Slide 11

Slide notes: When the new barcode is in the box. Click OK.



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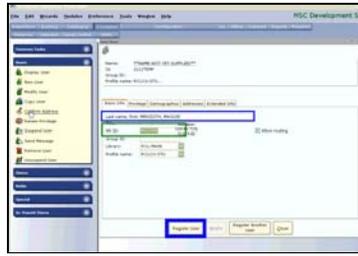
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Slide 12

Slide notes: This is the next screen, the basic info tab is highlighted.




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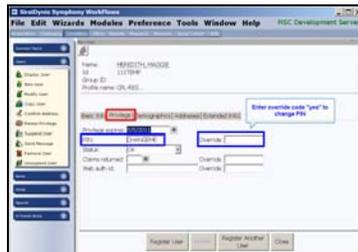
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Slide 13

Slide notes: Now set the "Caps Lock" on your keyboard, the information placed here must be in capital letters. In the basic info tab, type in the patron's last name, comma, first name, comma, middle initial with no period. A patron may choose to use the Alternative I-D box, this can only be set through the librarian. If you are doing a partial registration on the fly, you can stop here and click on Register User at the bottom of screen. If you are adding all the patron's data, don't click register user but go to the Privilege tab next to the basic info tab.




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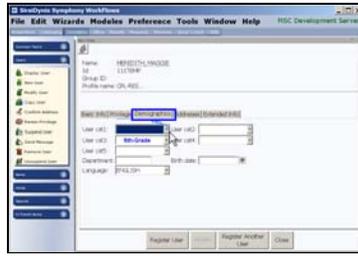
Slide 14

Slide notes: In the Privilege tab: Set the privileges according to your library's policies for expiration. Public Library standards require updating the patrons every three years. Schools may want to do it year by year. M-S-C Admin can do a global roll over and deletions for schools.

The pin-number is a default "change-me" for all new patrons. The patron may change their pin, by doing it now, or in their E-library account at a later time.

If you change the PIN, put the new one in and then go to over-ride and type in, yes.

Text Captions: Enter override code "yes" to change PIN




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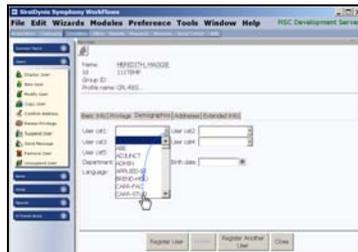


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Slide 15

Slide notes: On the demographics tab, use the drop down menus to enter user categories as entered in your library's demographic profile map. If you go to the menus you will see how some libraries use these categories.

Text Captions: 5th-Grade




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Slide 16

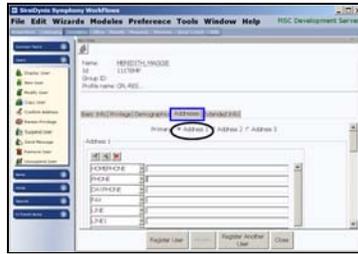
Slide notes: Use the drop down boxes to find your categories. These are used for statistical report purposes. User category one is usually the location status of a patron.

user category two is usually a description of the patron, like student, adult, faculty member etc.

user category three is generally where the patron is physically or in what grade level.

user category four can be used for a town or library or I-L-L definitions.

user category five is generally not used.




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Slide 17

Slide notes: In the next tab, Addresses, click on the dot for Address one, then fill in the patron information as appropriate.

The Phone number must be entered in the phone field, but also put numbers in the home-phone box and in the day phone box, either one could be used for a cell phone number.




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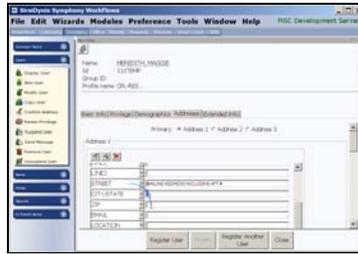
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Slide 18

Slide notes: Scrolling down still in the Address one gadget, type in the mailing address in the Street box, include P. O. Boxes and apartment or suite numbers on the same line as the street box. Try to keep them short by using abbreviations for route, drive, street and avenues, etc. If there is another address for the patron, say a physical address or a permanent out-of- state address or a temporary physical address, these would be put in the Address two box down below.



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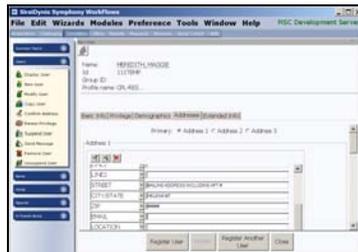
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Slide 19

Slide notes: Then the City and state abbreviation - no comma. Then the zip code.



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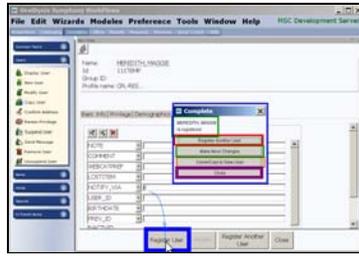
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Slide 20

Slide notes: For email notifications, enter an email address while still in the Address 1 gadget. Email addresses are case sensitive.






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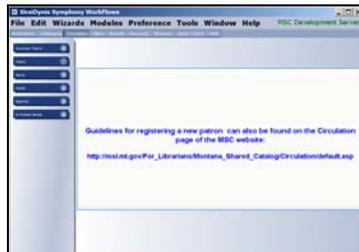
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Slide 23

Slide notes: Now click on Register User. This Complete box comes up and tells you that the patron is registered. You can close the box if you want to. But this also gives you some options. You can register another user, which takes you to the beginning of this wizard, you could make more changes to the registration, or Clone or Copy to a New User which is helpful when most of the data remains the same such as for students or a family signing up.




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Slide 24

Slide notes: More information can be found in the guidelines for registering a new patron on the circulation page of the MSC website: [http://msl.mt.gov/For\\_Librarians/Montana\\_Shared\\_Catalog/Circulation/default.asp](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Circulation/default.asp)

Text Captions:

Guidelines for registering a new patron can also be found on the Circulation page of the MSC website:

[http://msl.mt.gov/For\\_Librarians/Montana\\_Shared\\_Catalog/Circulation/default.asp](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Circulation/default.asp)



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Slide 25

Slide notes: This completes this tutorial on new patron registration. Use the symphony HELP for more assistance or call the MSC Administration.  
Text Captions: This completes this tutorial on Patron Registration.

Thanks for your attention!  
The  
Montana  
Shared  
Catalog