

MONTANA SHARED CATALOG

Patron Registration Guidelines – Schools

The MSC patron registration guidelines are designed to create consistent patron records with standardized data. When data is normalized reports are more accurate and easier to customize to your library's needs.

Data Entry Conventions

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

- 1) Enter data in ALL CAPS.
- 2) Do not use punctuation. Exceptions to the above are:
 - a hyphen in full zip codes (e.g. 59803-4799)
 - a comma between patron's last name and first name (e.g. SMITH, JOHN Q)
- 3) Use address abbreviations wherever possible (AVE ST LN DR RD)

Searching for Existing Patrons

If you have any patrons in WorkFlows **ALWAYS** check to see if the patron already has an id using the User Display Wizard.

User Profiles

Your library was configured with several user profiles. When you register a new user you will need to scan their barcode and select their user profile first. If you are unsure what your user profiles are please contact MSC Admin at msc@mt.gov to find out.

Entering Patron Information

Basic Info Tab:

- 1) Last name, first: Enter patron's name as follows: SMITH, DEBORAH L (note: no period after middle initial)
- 2) Title: Tab through/ignore the "title" field.
- 3) Alt ID: 6-10 character ID determined by patron to access their iBistro account; may be used in lieu of library card number. Many libraries choose to use a variation of the patron's name [DESMITH or SMITHDEB] or allow the patron to choose their own at registration.
- 4) Group ID: Public put the phone number here but schools can leave blank
- 5) Library: Be sure that your library is in this field
- 6) Profile name: This should be the user profile that you entered with the barcode. If you entered the user profile incorrectly you can change it here.

Privilege Tab

- 1) You can skip this entire tab unless you want to change the date the patron's privilege expires or their PIN
- 2) To change the PIN from CHANGEME you will need to enter a new PIN and type YES in the override box.

Demographics Tab

- 1) User Categories. You do not have to use all of these categories. If you choose to use any they should always be entered consistently. The more consistent this information the better the reporting. For schools it is most important to put the grade level in User Category 3 (e.g. 1ST-GRADE). If you want to use other User Categories please refer to the User Category lists on the MSC website Circulation page http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Circulation/default.asp
- 2) Department: Enter the patron's homeroom in this field in ALL CAPS (e.g. JOHNSON). Because this is a text field it is important to always type the homeroom teacher's name the same way.
- 3) Birthdate: Use the calendar gadget to enter the patron's birth date. This is not a required field.
- 4) Language: This field defaults to English.

Addresses Tab

- 1) Unless you are planning to send overdue notices in the mail you can skip most of this tab.
- 2) Phone: Enter as (000)000-0000 with no spaces. Always enter information in the same phone field (e.g. PHONE or HOMEPHONE).
- 3) Address hints:
 - All mailing addresses (incl. PO BOXES) go in Address 1.

- 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. Be sure to always add the street address to the same line (e.g. STREET).

Example of registration data entry:

PHONE: JOHNSON, ROBERT E
STREET: PO BOX 2156
CITY/STATE: MISSOULA MT
ZIP: 59808-2156
EMAIL: ROBBIE678@YAHOO.COM
(pay attention to case sensitivity
in email addresses)

Extended Info Tab

- 1) You won't need to enter anything in this tab unless you have Notes or Comments about the patron or if you intend to send notices via email.
- 2) Notify Via: Enter an E into this field if you have entered an email address in the Addresses Tab and you intend to have email notices go out to your patrons. Email notices are sent from sirsi@mt.gov

Notes on Data Entry

Be consistent! If you want accurate statistics it is imperative that you use only certain user categories and that you enter address information systematically. It doesn't matter so much which fields you use, just so that you always use the same ones and you know how to instruct your staff.

Also, avoid using social security numbers for any of the id numbers.