

## Registering Patrons

About: Registering new patrons, updating patron information, creating associations

Press F7 to begin the patron registration process. This opens a *Find Tool* (Find Tool will have “Patron Records”) in the title bar.

Use the *Find Tool* to ensure there are no other patrons by the name of the current applicant. If there are no others, follow the instructions below.

### Registering a Patron:

On the *Polaris Shortcut Bar*, click on “New.”  Select “Patron Record” from list.

**Address and Phone**  (you are automatically placed on this window):

All mandatory information is in bold

Ensure address check is filled in

Specify which address you would like as default

Enter an email address in the Email address field

Ensure patron code is correct

Ensure expiration date is correct

The address is also mandatory, but you must click on “Add...”, add multiple by clicking again. (“Edit...” when there is one already)

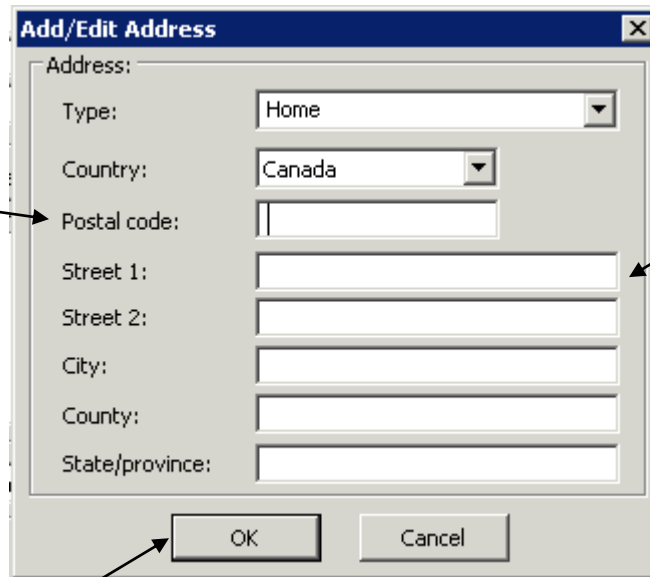
Ensure there is a phone number

Type	Street One	Street Two	City	State	Zip Code	County	Coun...
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Notification option must be mailing address or email address – Telephone 1, 2, and 3 are only for libraries that have an automatic telephone system

Adding addresses:

Enter a postal code.  
This auto-populates  
City and Province

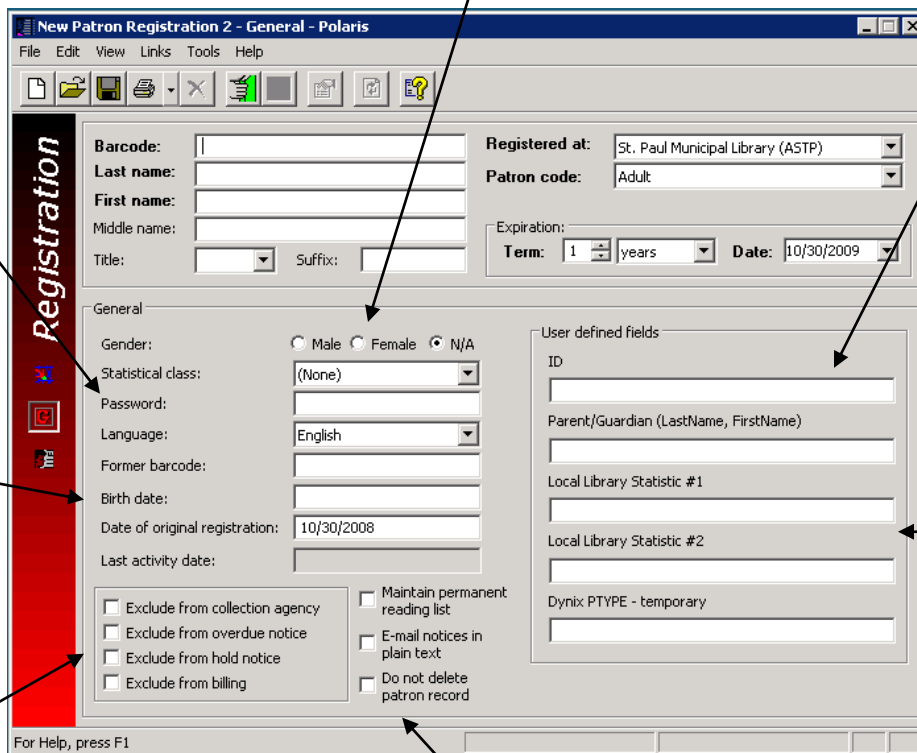


Enter the street  
address

Click OK to Save

### General

Enter password –  
last 4 digits of  
phone number.  
Tell patron to  
change it online



Enter Gender

Can be whatever  
ID your library  
decides to track

Set birthdate for  
demographic  
reasons (PType is  
now for services)

User defined  
fields are  
populated with  
data each library  
wishes to track.  
These sections  
will be turned  
into drop-down  
menus by NLLS.  
This needs to be  
decided at the  
board level, and  
NLLS needs to be  
alerted

Check the  
pertinent points  
in the exclusions  
list

Check, if pertinent

## Status

This window provides information about the patron, including blocks and money owed.

Don't forget to click on *Save!*

Registration

Barcode:

Last name:

First name:

Middle name:

Title:  Suffix:

Registered at: St. Paul Municipal Library (ASTP)

Patron code: Adult

Expiration: Term: 1 years Date: 10/30/2009

Status

Blocks	Amount owed: \$0.00
	Items out: 0
	Items overdue: 0
	Items long overdue: 0
	Items on hold: 0
	Claims (current): 0
	Claims (total): 0
	Lost items: 0
	Notes: No

Notice

Title	Type	Date	Method	Amount
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For Help, press F1

## Duplicating a patron record:

Click on the *New* button 

A window appears:

Ensure "Copy Existing Work Form" is selected

New Patron Registration

Clear Work Form

Copy Existing Work Form

Use Existing Template

OK

Cancel

Help

Template >>

Click on "OK" to bring up new form

This opens a new window, with most mandatory fields filled. The only one that is not filled is *Barcode*:

Enter new barcode

Don't forget to click on Save when finished!

Ensure other mandatory information is correct – names will have to be changed

Home address should be the same – double check on other addresses, if necessary

Make sure the correct addresses are assigned to these fields

Make sure email address is correct for this patron

Type	Street One	Street Two	City	State	Zip Code	County	Coun...
Home	1234 45 Ave		St Paul	AB	T0A 3A3		Canada
Work	12345 123 a St...		Edmonton	AB	T5L 0M1		Canada

Make sure the patron's phone number is entered

## Associations:

This is the same as the family link in Dynix.

Go into first patron's record.

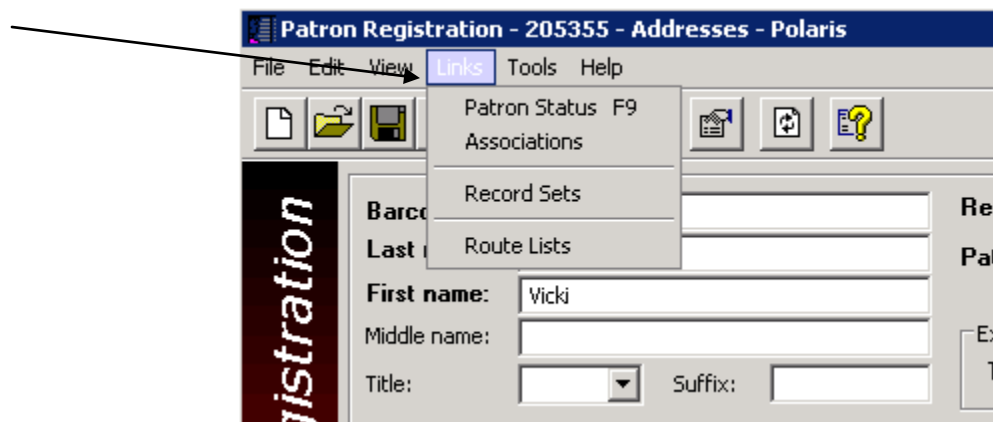
The screenshot shows the 'Patron Registration - 205355 - Addresses - Polaris' window. The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with various icons. A vertical red bar on the left side contains the word 'Registration' and several icons. The main form area is divided into several sections:

- Registration Details:**
  - Barcode: knysh117
  - Last name: knysh
  - First name: Vicki
  - Middle name: (empty)
  - Title: (dropdown)
  - Suffix: (empty)
  - Registered at: St. Paul Municipal Library (ASTP)
  - Patron code: Standard
  - Expiration: Term: 0, Date: 10/31/2009
- Addresses, Phone Numbers:**

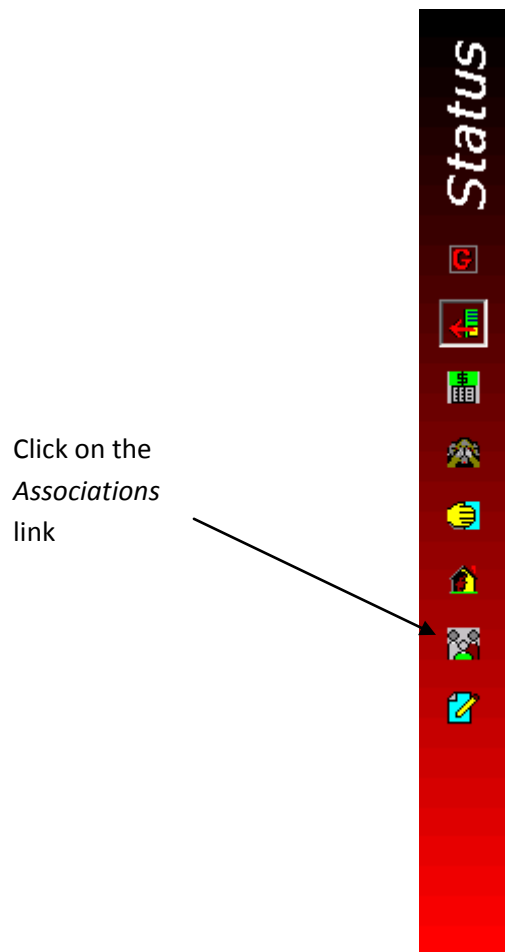
Type	Street One	Street Two	City	State	Zip Code	County	Coun...
Home	5234 -55 Ave		St Paul	AB	T0A 3A0		Canada
- Address Check:**
  - Term: 0, Date: 10/31/2009
  - Buttons: Add..., Edit..., Remove, Mailing Label
  - Address for notices and bills: Home
  - Address for monthly statements: Home
  - Address for Invoices: Home
  - Email address: (empty)
  - Alt Email address: (empty)
  - Voice phone 1: 780-645-4229
  - Voice phone 2: (empty)
  - Voice phone 3: (empty)
  - FAX number: (empty)
  - Notification option: Mailing Address

At the bottom, it says 'For Help, press F1' and 'NUM'.

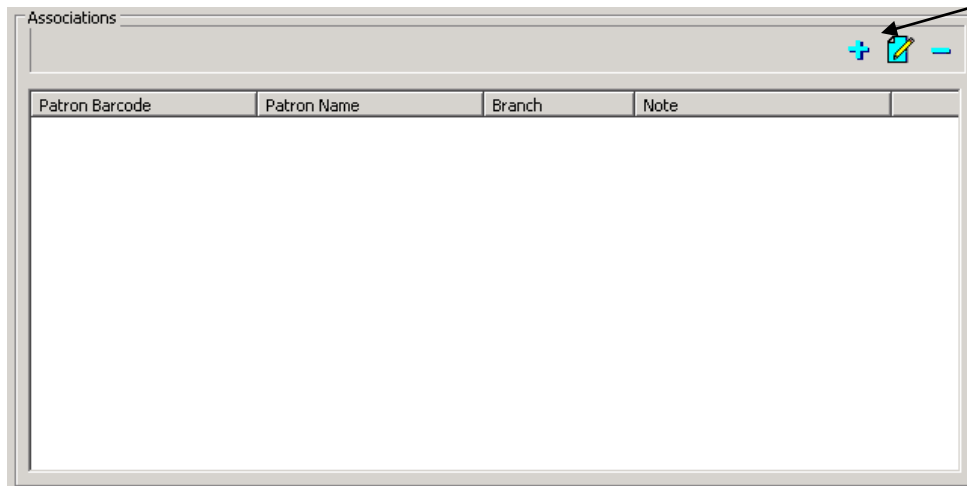
Click on Links>Patron Status, or press F9



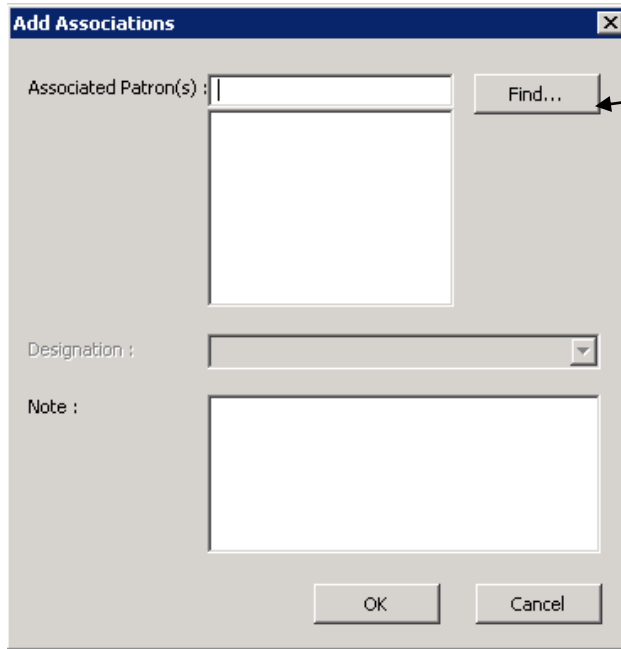
This opens the patron's status screen.



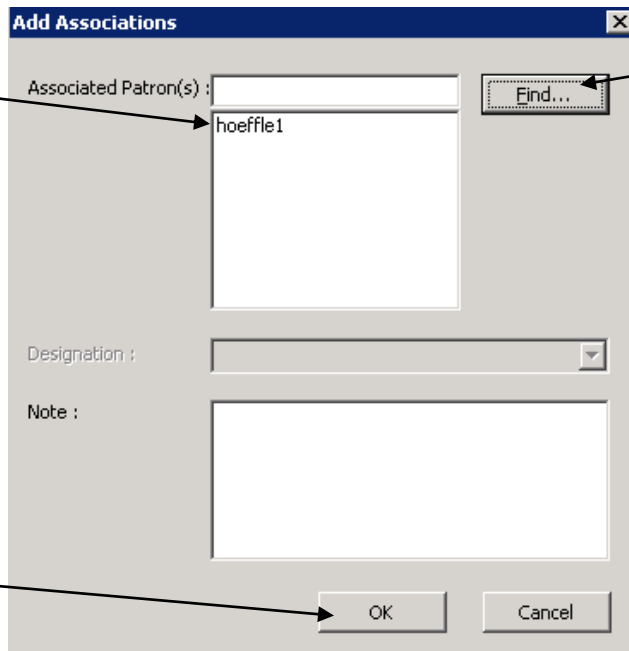
This changes the window to allow you to add or remove people:



Click on plus sign to add people. This opens a new window.



Click "Find..." and use *Find Tool* to find necessary patrons



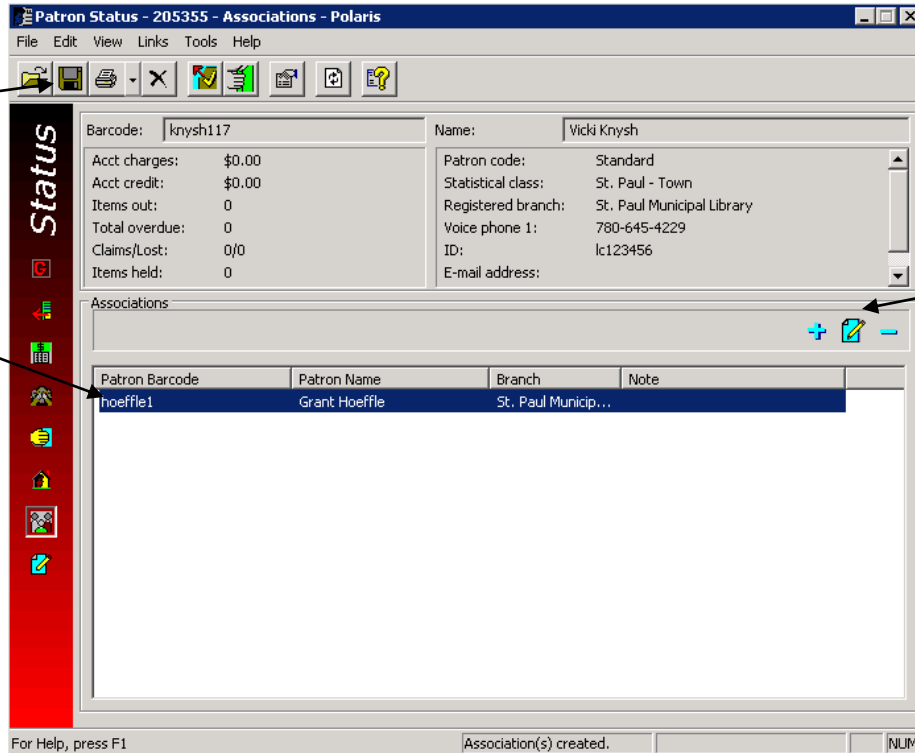
As you find patrons, it lists them

If you wish to continue to add, click "Find..." again and find more patrons. Do this as many times as necessary.

Click *OK* when finished. Window will close.

Click Save before exiting!

Patrons are now listed here



If you wish to add more or remove patrons, click on the plus or minus sign.

To remove the patron, the line must be selected before you click on the minus sign.

The icon in the middle is to add a note.