Workflows Tip of the Week

Module: Circulation

Summary: **Components of a patron record - Public Libraries**

Note: There are 3 important parts to every patron record that controls how a patron can use the system and what library owns that patron.

Instructions:

The **Basic Info** tab contains information about what library is the patron's primary library and how that patron can use the library.

The User ID is the number representation of the patron's barcode. It has no other purpose than to give staff a quick way to look up a patron. The 4 digit library code has no significance to the software.

The Library indicates which library "owns" the patron. When a report is run that shows the number of registered card holders at a library it is looking for the code in this field. This is also used to determine holds precedence. Local holds are always filled first if placed properly and the system looks for this field to determine if a patron is a local patron.

The Profile tells the system how long before a patron's card expires, how many items a patron can have checked out at any one time, how many holds, and the triggers that can make a patron blocked (outstanding fines and/or number of overdue items). There is chart listing the patron profiles on the SAILS website that explains the parameters for the most commonly used Profiles.

- http://sailsinc.org/circ/PatronProfiles2.asp

The User Cat2 field in the **Demographics** tab identifies the community in which a patron resides. It should match the City listed in Address1 of the Addresses tab. When a report

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is run showing non-resident use or counting how many residents of a community hold a library card, it is this field that is used.

When a patron moves to a new community it is not necessary to issue that patron a new library card but it is important to update the information in these fields. It is also important to update patron profiles when a patron goes from being a juvenile to an adult or from an adult to a senior.