



## 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 screenshot shows a web-based interface for modifying a user record. The window title is "Modify User". At the top, there are two tabs: "Alerts" and "Notes". Below these, the user's details are displayed: Name: Barbara, Id: 222, Group ID: (blank), and Profile name: ADULT. A section titled "Identify User" contains a text input field for "User ID" with the value "222" and a "Home phone" field with the value "508-000-0000". Below this is a tabbed interface with five tabs: "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Basic Info" tab is selected and contains several fields: "Last name, first:" with the value "Barbara", "Title:" (blank), "User ID:" with "222", "Alt ID:" (blank), "Group ID:" (blank), "Library:" with a dropdown menu showing "WAREHAM", and "Profile name:" with a dropdown menu showing "ADULT". There is also a checkbox labeled "Allow routing" which is checked. At the bottom of the window, there are four buttons: "Get User Information", "Modify User", "Modify a Different User (b)", and "Close".

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 a 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>

Modify User

Alerts Notes

Name: Barbara  
Id: 222  
Group ID:  
Profile name: ADULT

Identify User

User ID: 222 Home phone: 508-000-0000

Basic Info Privilege Demographics Addresses Extended Info

User cat1: AF1 User cat2: MARION  
User cat3: EMAIL User cat4:  
User cat5:  
Department: Birth date: 5/14/1969  
Age: 38

Get User Information Modify User Modify a Different User (b) Close

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

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.