



## Workflows Tip of the Week

Module: Circulation

Summary: Patron Records - Issuing Library Vs. UserCat2

**Note:** There are two fields in the patron record that refer back to a SAILS library. Each field has a different function.

### Instructions:

1. Search for a patron using the Modify User Wizard. The library name in the Basic Info tab identifies what library has issued the card to the patron. The patron now “belongs” to that library.

2.

A screenshot of a web-based form for a patron record. The form has a tabbed interface with five tabs: "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Basic Info" tab is selected. The form contains the following fields:

- Last name, first:
- Title:
- User ID:
- Alt ID:
- Group ID:
- Library:
- Profile name:

3. Click the Demographics Tab. User cat2 should be the name of the community where the patron resides. It should match the City in Address1. If the patron lives outside of SAILS but in Massachusetts then the value is set to MASS. If the patron lives outside of MASS, then it is set to NOMASS.

A screenshot of the "Demographics" tab in the patron record system. The form contains the following fields:

- User cat1:
- User cat2:
- User cat3:
- User cat4:
- User cat5:
- Department:
- Birth date:
- Age: 38