

# Workflows Tip

## Module: Circulation

### Summary: **Online registration by a new patron**



**Note:** A new patron can register online for a temporary library card.

With a temporary library card, the patron can:

- Check out items (no more than five)
- Place holds (no more than five)
- Use the online databases, and
- Download Overdrive materials.

When a patron registers for a temporary library card, he or she selects a home library, enters their name, address, phone number, email address, PIN, and other information in a form, and then immediately receives a confirmation email. The email instructs the patron to go to their library within **three weeks** and bring **identification** so that they can get a permanent library card. After three weeks, if the patron has not picked up the permanent card, the temporary one expires. After four weeks, the temporary card is removed from the system.

### **Profile name**

When a patron registers for a temporary library card, WorkFlows sets the patron's Profile Name to OUREG.

### **Property setting**

The check box for the "Profile modified/auto extend privilege" property in the Modify User wizard (Behavior tab) must be checked.

### **Circulation desk procedure**

When the patron comes to the library to pick up the permanent card:

1. Check that the patron does not already have an account in the system.
2. **Do not** create a new record for the patron.

In the **Modify User** wizard, enter the temporary card number. The information that the patron provided when they registered online appears in the various tabs.

**Alerts**

Name: silva, corey\_j  
 Id: 22043000001676  
 Group ID:  
 Profile name: OUREG...

Identify User

User ID: 22043000001676

Street: 61 bonney st 2  
 City, state: newbedford,ma,massachussets  
 Zip: 02740  
 Home phone: 5089902319  
 Email: coreysilva81802@hotmail.com

Basic Info | Privilege | Demographics | **Addresses** | Extended Info

Primary:  Address 1  Address 2  Address 3

Address 1

STREET	61 bonney st 2
STREET	
CITY/STATE	newbedford,ma,massachussets
ZIP	02740
HOMEPHONE	5089902319
WORKPHONE	
CELLPHONE	
EMAIL	coreysilva81802@hotmail.com

3. Scan in the barcode of the permanent card.
4. Change the **Profile Name** from OUREG to the appropriate profile.
5. Update the **Charge History Rule**, if the patron wants to opt-in to this service.
6. Enter the correct demographics – usercat1, usercat2, usercat3.
7. Make any necessary corrections for spelling, format, and capitalization in any of the other fields.
8. Click **Modify User**.

The system extends the new patron's privilege (length of time; number of check outs or holds the patron is allowed to place) based on the new profile.

**Please remember:** when a patron with a temporary card comes in to get a permanent one, **do not** create a new patron record – just update the temporary record with the new barcode, change the profile, and make any necessary corrections to the patron information.