

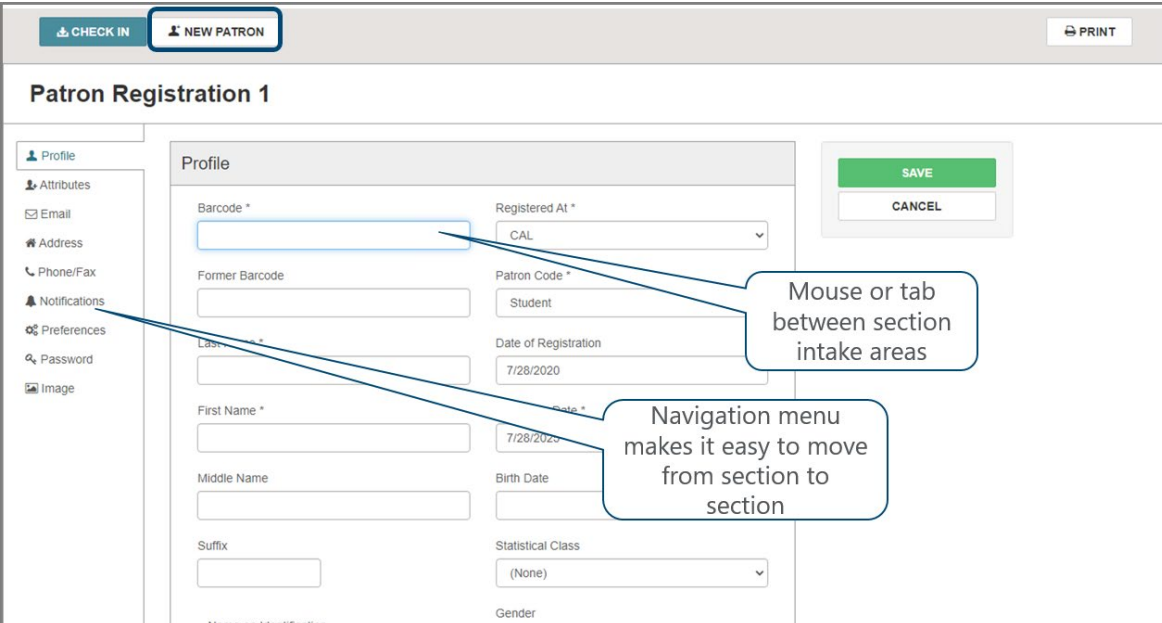
POLARIS LEAP PATRON REGISTRATION

How to Create a Patron Records in Leap

Patron Registration

This guide provides step-by-step instruction on patron records creation.

To register a new patron begin by clicking the New Patron button.



The screenshot shows the 'Patron Registration 1' form. The navigation menu on the left includes: Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Password, and Image. The main form area is titled 'Profile' and contains the following fields:

- Barcode *
- Registered At * (dropdown menu)
- Former Barcode
- Patron Code * (dropdown menu)
- Date of Registration
- Last Name *
- First Name *
- Middle Name
- Suffix
- Birth Date
- Statistical Class (dropdown menu)
- Gender

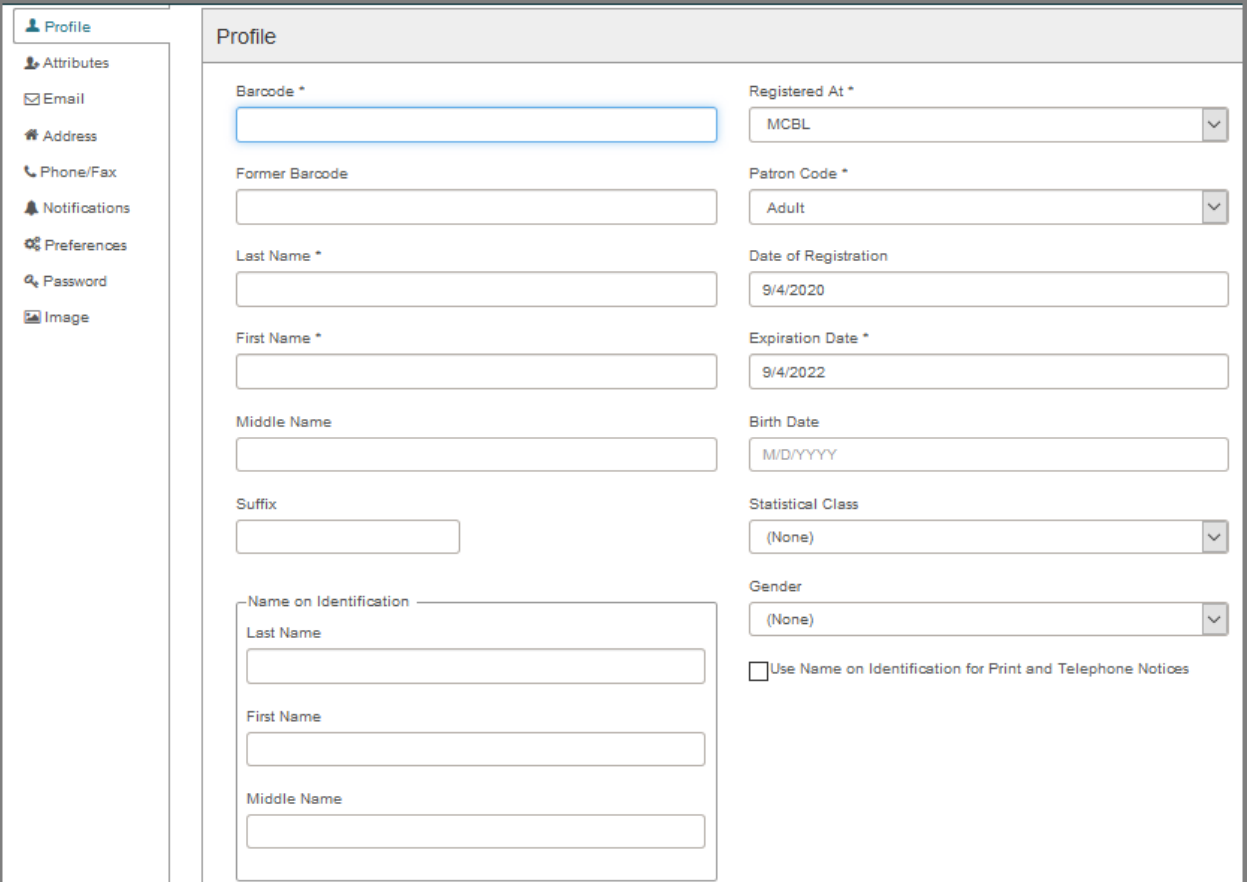
Buttons for SAVE and CANCEL are located on the right side of the form. Callouts indicate that the navigation menu makes it easy to move from section to section, and that the mouse or tab can be used to move between section intake areas.

Note: It is possible to suppress specific fields and views of a patron registration record using System Administration settings

Training

The patron registration form is organized in sections.
The **Profile** section holds:

- Barcode—current and former
- Registered branch
- Patron code
- Name – title, suffix and name on identification
- Dates—registration, expiration and birth date
- Statistical class
- Gender



The screenshot shows a web form titled "Profile" with a left-hand navigation menu and a main content area. The navigation menu includes links for Profile, Attributes, Email, Address, Phone/Fax, Notifications, Preferences, Password, and Image. The main content area is divided into two columns. The left column contains fields for Barcode *, Former Barcode, Last Name *, First Name *, Middle Name, Suffix, and a section for Name on Identification with sub-fields for Last Name, First Name, and Middle Name. The right column contains fields for Registered At * (dropdown menu), Patron Code * (dropdown menu), Date of Registration, Expiration Date *, Birth Date, Statistical Class (dropdown menu), Gender (dropdown menu), and a checkbox for "Use Name on Identification for Print and Telephone Notices".

Profile	
Barcode *	Registered At *
<input type="text"/>	MCBL
Former Barcode	Patron Code *
<input type="text"/>	Adult
Last Name *	Date of Registration
<input type="text"/>	9/4/2020
First Name *	Expiration Date *
<input type="text"/>	9/4/2022
Middle Name	Birth Date
<input type="text"/>	M/D/YYYY
Suffix	Statistical Class
<input type="text"/>	(None)
Name on Identification	Gender
Last Name	(None)
<input type="text"/>	<input type="checkbox"/> Use Name on Identification for Print and Telephone Notices
First Name	
<input type="text"/>	
Middle Name	
<input type="text"/>	

Training

The **Attributes** section holds:

- Attributes are called User Defined Fields (UDF) in the client.
- If your library also uses Custom Data Fields, these fields and UDF's are combined in the attributes area.

Attributes	
Privileges/Restrictions	Parent/Guardian
<input type="text"/>	<input type="text"/>
Friends of the Library?	ID/License *
(None) <input type="checkbox"/>	<input type="text"/>
Not Currently Used	Member of Friends
<input type="text"/>	<input type="text"/>
Summer reading program completion - year	Patron may check out items for:
<input type="text"/>	<input type="text"/>

Training

The **Email and Address** section holds:

- Click the Address button in the Addresses section to add an address.
- Click the button again if additional addresses are needed.
- Addresses may be edited or deleted.
- The address check date is also set here.

Email

Email Address

Alt Email Address

Addresses

➤ ADDRESS

Address Check Date

Term

Years

Phone/Fax

Phone 1

Phone 2

Phone 3

Phone/Fax & Notification section:

- Enter up to three phone numbers and a fax number
-

Phone/Fax	
Phone No. 1	Phone No. 2
<input type="text" value="410"/>	<input type="text"/>
Phone No. 3	Fax No.
<input type="text"/>	<input type="text"/>

- Check “Additional TXT message” to send a text in addition to the selected notification option
- Select desired phone and carrier for text messaging
- eReceipt Options are also set here

Notification Settings	
Notices Address	eReceipt Option
<input type="text" value="(None)"/>	<input type="text" value="Email Address"/>
Notification Option	<input type="checkbox"/> Additional TXT Notice
<input type="text" value="Email Address"/>	
Text Messaging Phone	Wireless Carrier
<input type="text" value="(None)"/>	<input type="text" value="(None)"/>

Preference & Password


- Check desired preferences
- Enter the password and retype it to confirm

Preferences

Exclude from Notices and Reminders

☐ Overdue
☐ Hold
☐ Billing
☐ Almost Overdue/Auto-Renew
☐ Patron Record Expiration
☐ Inactive Patron

Language

English 

☐ Maintain Reading History
☐ Do Not Delete Record
☐ E-mail Notices in Plain Text
☐ Exclude from Collection Agency

Password

Password

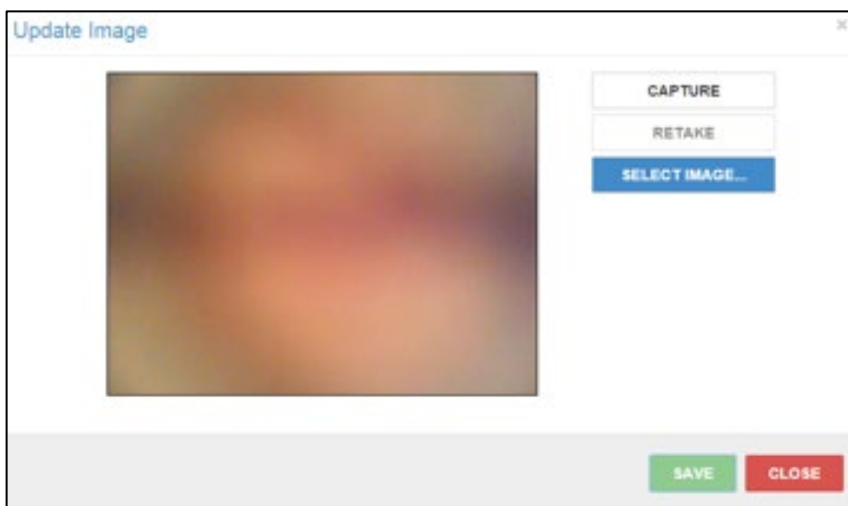
Password (Confirm)

Training

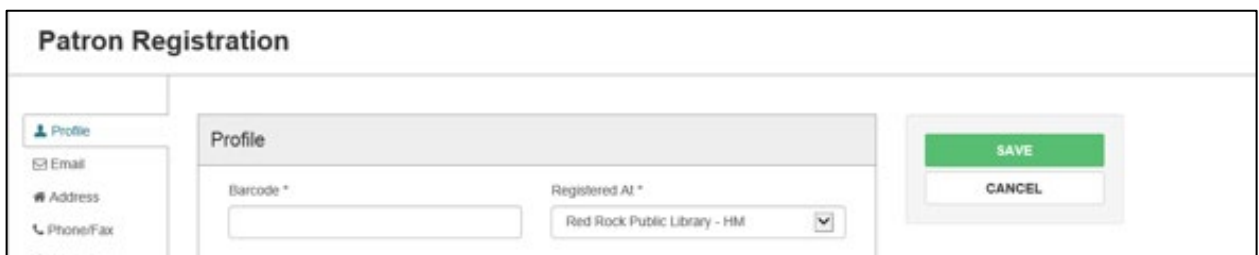
The **Image** section adds an image or photograph to the patron registration.



- Click Update Image to capture an image or browse to a picture
- Click the green Save button to finish saving the image



- When the new patron is complete, click the green Save button
- Staff will be prompted if needed information is missing

A screenshot of the "Patron Registration" form. The "Profile" section is active, showing a "Barcode *" field and a "Registered At *" dropdown menu. The dropdown menu is set to "Red Rock Public Library - HM". To the right of the form are two buttons: "SAVE" (green) and "CANCEL" (white).

Miscellaneous Info.

Training

After a patron has been saved, a Misc. info section appears that hold registration date, circulation counts, merging information, etc.

Misc. Information	
Record ID	YTD Circ Count
87441	14
Registered On	Lifetime Circ Count
1/26/2014	14
Creator	YTD You Saved Amount
gvandenberg	\$0.00
Creation Date	Lifetime You Saved Amount
8/26/2014	\$0.00
Modifier	Merge Date
gvandenberg	
Modification Date	Merge Barcode
2/18/2016	
Last Activity	
2/18/2016 1:48:39 PM	

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