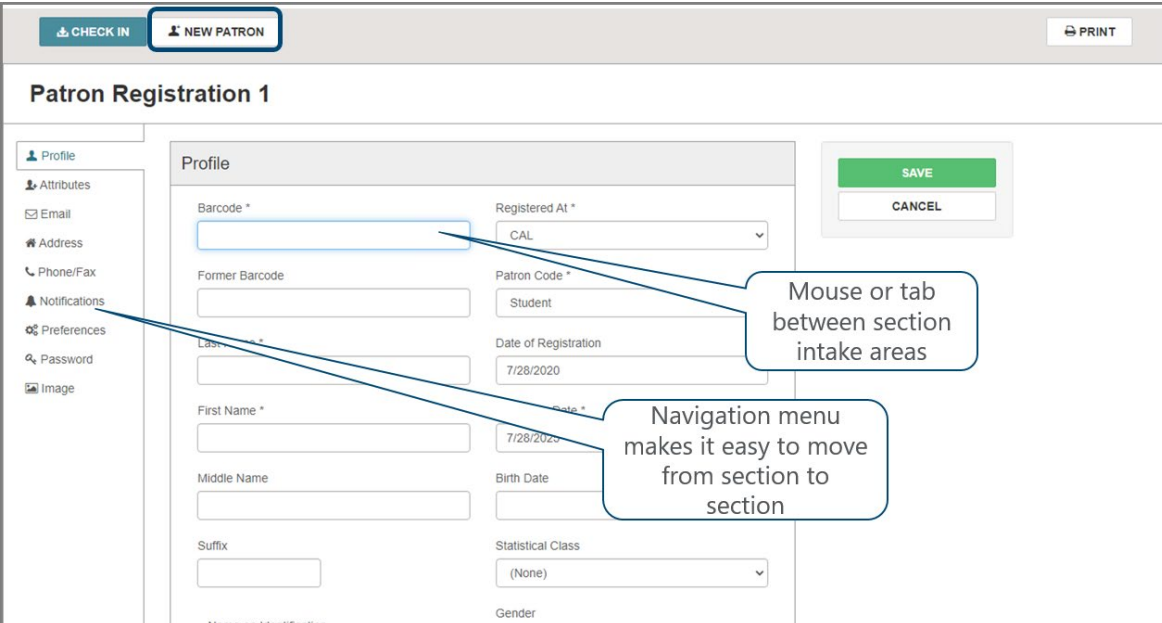# Training

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.

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

iii innovative

Part of **Clarivate**

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 **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.

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.

Phone/Fax & Notification section:

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

Phone/Fax

Phone No. 1	Phone No. 2
410	

Phone No. 3	Fax No.

- 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
(None)	Email Address

Notification Option	
Email Address	☐ Additional TXT Notice

Text Messaging Phone	Wireless Carrier
(None)	(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
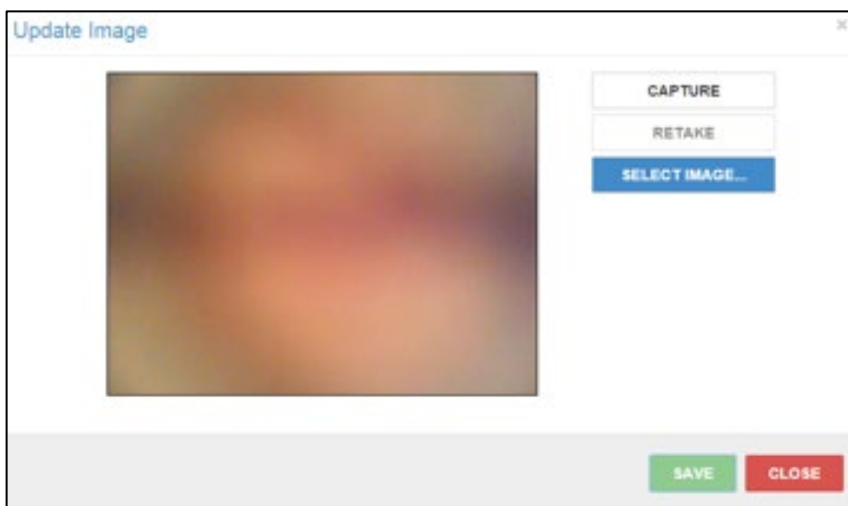☐ Exclude from Collection Agency

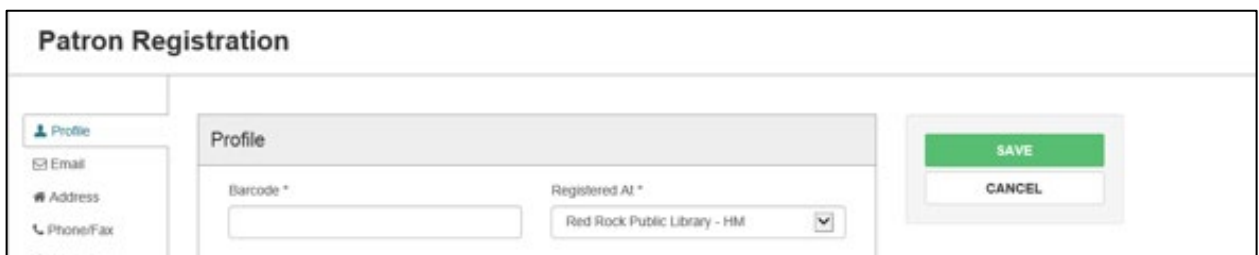**Password**

Password

Password (Confirm)

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

Miscellaneous Info.

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	