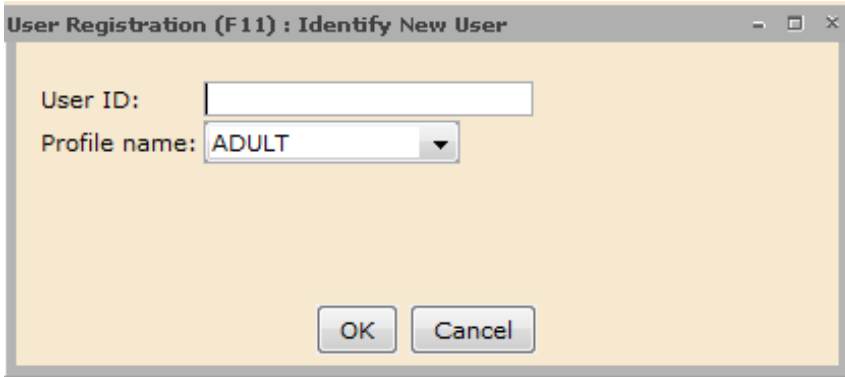


User Registration Wizard

The **User Registration** wizard creates a new user record.

To register a new user

1. On the Users toolbar, click the **User Registration** wizard  and this window will pop up.



2. Scan the barcode into the **User ID** field.

3. The **Profile name** default depends on the library you are logged in as but the drop down arrow will allow you to pick the correct profile name.

4. Press **ENTER** or click **OK**. The next User Registration window with several tabs appears. The entries on each tab are explained below.

Basic Info Tab

The screenshot shows a web application window titled "User Registration (F11)". At the top left is a small icon of three people. Below it, a summary box displays: "Id: 302203", "Group ID:", and "Profile name: POCSSTU...". Below this is a tabbed interface with "Basic Info" selected. The "Basic Info" tab contains the following fields and controls:

- Title:
- First name:
- Preferred name: Use preferred name
- Middle name:
- Last name:
- Suffix:
- Alt ID: Allow routing
- Group ID:
- Library:
- Profile name:

At the bottom of the form are four buttons: "Save", "Check Duplicate User", "Register Another User", and "Close".

1. In the **First name**, **Last name** boxes, type the user name. For names with suffixes add Jr, Sr, III in the Suffix box.
2. Do not add anything in the **Alt ID** field.
3. Do not add anything in the **Group ID** field.
3. The **Library** associated with the user's card should be defaulted to the library you are in.
5. Verify the **Profile name**. This field carries over the value entered from the **User Registration** wizard. You can change this now if you previously selected the incorrect profile.
6. Do not change the **User preferred name** or **Allow routing** check boxes.

Privilege Tab

The screenshot shows a web application window titled "User Registration (F11)". At the top left, there is a small icon of three people. Below it, a summary box contains the following text: "Id: 302203", "Group ID:", and "Profile name: POCSSTU...". Below this is a tabbed interface with five tabs: "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Privilege" tab is currently selected. The main content area of the "Privilege" tab contains several form fields: "Library card expires:" with a date input field showing "1/28/2014" and a small icon; "PIN:" with a text input field showing "3687" and an "Override:" text input field; "Status:" with a dropdown menu showing "OK"; "Claims returned:" with a text input field and a small icon, and an "Override:" text input field; and "Web auth id:" with a text input field and an "Override:" text input field. At the bottom of the window, there are four buttons: "Save", "Check Duplicate User", "Register Another User", and "Close".

1. Symphony automatically assigns the **Privilege expires** date based on the user's profile.
2. The **PIN** assigns a random number. PIN changes require an **Override**. Your supervisor will provide the code for you to use.
3. The default **Status** setting is **OK** for a new user. Depending on the patron's activity, this status can change.
4. Use the **Claims returned** and **Override** boxes to record the number of times a customer claims to have returned a book that cannot be located. Manual changes require an override.
5. Leave the **Web auth id** empty.

Demographics Tab

Some Information on the Demographics tab is optional. However Internet Access, Residency and Birthdate are very important.

The screenshot shows the 'User Registration (F11)' window with the 'Demographics' tab selected. The form contains the following fields:

- Id: 302203
- Group ID:
- Profile name: POCSSTU...

The 'Demographics' tab includes the following fields:

- Internet Access: [Dropdown]
- Residency: [Dropdown]
- Misc/Major: [Dropdown]
- Gender: [Dropdown]
- Education: [Dropdown]
- Department: [Text]
- Birth date: [Text]
- Language: ENGLISH [Dropdown]

Buttons at the bottom: Save, Check Duplicate User, Register Another User, Close.

- 1. Internet Access:** Click the arrow for a list to choose from.
 - Full – Unlimited access the Internet
 - Limited – Only the library supplied databases and software
 - Unknown – Used for School, Academic and Special libraries; is equivalent to Limited.
- 2. Residency** is for home area of patron and used for special statistics.
 - DELMAR – if they live in the town of Delmar, DE or MD
 - DOVER – if they live in the city limits
 - HARRINGTON – if they live in the town
 - KENT – if they live in the County but not in Dover, Harrington or Smyrna
 - MILFORD-SD – if they live in the Milford School District
 - NEWCAST – if they live in New Castle County
 - OUTSTATE – if they live in another state (except in Delmar, MD)
 - SMYRNA – if they live in the town of Smyrna
 - SUSSEX – if they live in Sussex County but not in Delmar, DE
- 3. Gender:**
 - FEMALE
 - MALE
 - NOTAPP = Not Applicable – for special profiles like Damaged or Discard
- 4. Misc/Major** is being used in Academic Libraries but not in Public Libraries so leave them blank.
- 5. Education** and **Department** should also be left Blank.
6. Add the patron's **Birth date** to help identify patrons with the same name.

Addresses Tab

User Registration

Name: Colose, Katie
Id: 3022393333
Group ID:
Profile name: NCCNEWAD...

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

Primary: Address 1 Address 2 Address 3

Address 1

HOMEPHONE
LINE
POBOX
STREET
CITY/STATE
ZIP
EMAIL
LOCATION

Address 2

USEFOR
HOMEPHONE
LINE
POBOX
STREET
CITY/STATE
ZIP

Address 3

CARE/OF
DAYPHONE
WORKPHONE
LINE
POBOX
STREET
CITY/STATE
ZIP
HOMEPHONE

1. Enter up to three **Addresses**.
2. Click **Address 1**, **Address 2**, or **Address 3** to specify the **Primary** address. The system uses the primary address when running notice reports.

3. If you want to e-mail notices (like Overdue Notices), be sure to type the patron's full e-mail address in the **EMAIL** box. If they do not want email notices but want to have their email address on file, type it in a **Note** field in the **Extended Info** tab.

NOTE: Your Symphony administrator controls the fields that display in the address template. If you need additional fields, ask your Symphony administrator to modify the Address policy. Do not modify the template from this window.

Extended Info Tab

This tab has text fields including **Notes** and **Comments** for additional user information. **Only staff members using WorkFlows see both Notes and Comments.**

Notes are used to alert staff to important information concerning a patron's record such as the need to update a phone number or retrieve an item from the lost and found.

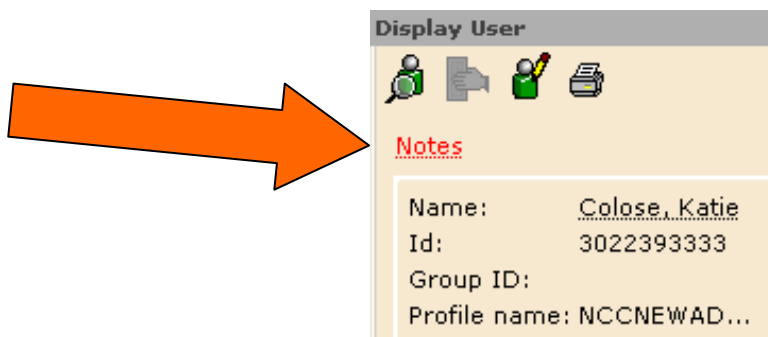
Comments should be used to provide information to other staff members about a patron that may be of a sensitive nature. Please discuss their use with your supervisor.

To remove a note or comment once it has been entered, use the delete tool in the toolbox.



****IMPORTANT****

ONLY Notes will appear in a patron's record when it is accessed.



User Registration (F11)

Id: 302203
Group ID:
Profile name: POCSSTU...

Basic Info | Privilege | Demographics | Addresses | Extended Info | SMS Notice Contact Info

GUARDIAN	
LICENSE	
PASSPORT	
NOTE	
COMMENT	
LOSTITEM	
NOTIFY_VIA	EMAIL
CELLPHN	
WORKPHN	
TEACHER	

1. Put in the **Guardian** for juveniles; add the driver's **License** number (State[space] Number – DE 123456) and additional phone numbers if needed.
2. If the patron would like **Email** Notification (default) make sure we have the correct email address under the **Addresses** tab. If they would not like to be notified by Email, then change the word EMAIL to **PHONE**.
3. Click **Check Duplicate User** to have the system look for possible duplicate registrations. The system will check Name, Street, Birthdate, Home Phone and License fields for duplicates and display any potential matches.

SMS Notice Contact Info Tab

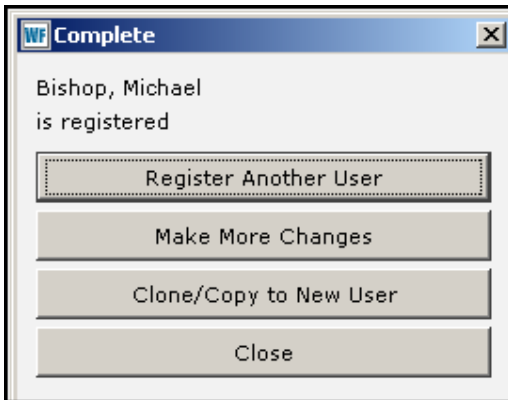
If patrons would like to receive text messages for certain library communications, the phone number and type of messages are configured here.

The screenshot shows the 'User Registration (F11)' application window. At the top, it displays user information: Id: 302203, Group ID:, and Profile name: ADULT... Below this is a tabbed interface with tabs for Basic Info, Privilege, Demographics, Addresses, Extended Info, and SMS Notice Contact Info. The 'SMS Notice Contact Info' tab is active, showing a 'Phone Numbers' section. This section contains a table with the following columns: Label, Country, Phone Number, Overdue Notice, Hold Pickup Notice, Bill Notice, Manual Message, and User Announcements. The 'Country' column is set to 'United States'. To the left of the table are two icons: a plus sign in a square (Add Phone) and a minus sign in a square (Delete Phone). An arrow points from the 'Add Phone' icon to the 'Label' column header. At the bottom of the window are buttons for Save, Check Duplicate User, Register Another User, and Close.

1. Click on the **Add Phone** helper to add a line.
2. Type in an identifying **Label** for this phone such as Mom's Mobile.
3. Don't change the **Country**.
4. Type the **Phone Number** into the box without any punctuation.
5. Check the appropriate boxes for the types of notices the patron would like to receive.

Additional phone numbers may be added by clicking the **Add Phone** helper. If a phone needs to be removed, click in the line for the correct phone number and then click the **Delete Phone** helper.

6. Lastly, click **Save** to create the user record. A confirmation window appears:



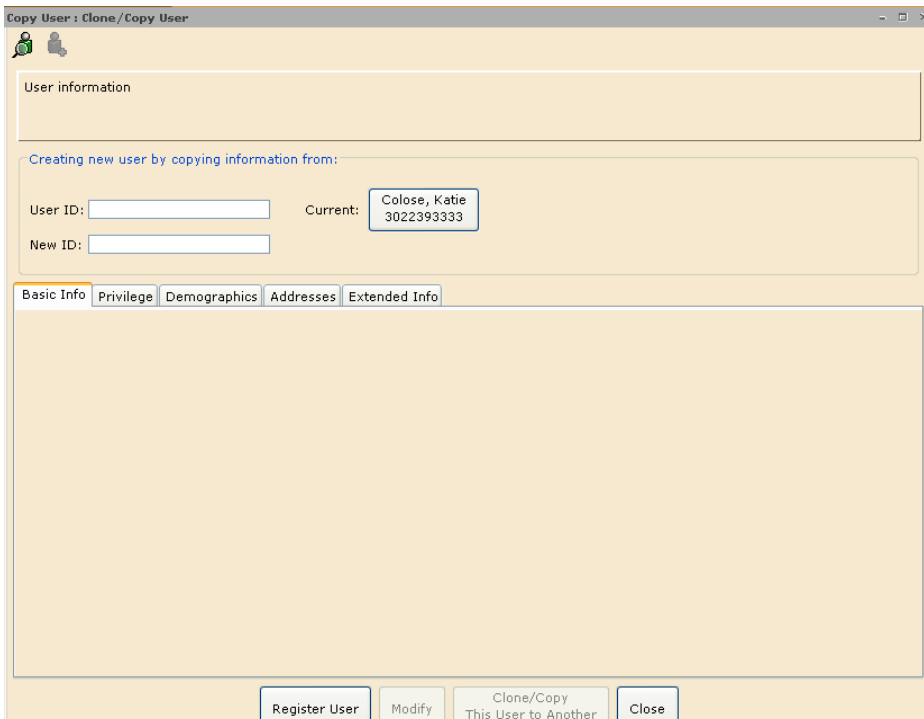
7. Click **Register Another User** to repeat the process, or click **Close**.

Copy User Wizard

The **Copy User** wizard transfers data from non-unique fields into a new user record. This wizard is useful when registering an entire family if the address information is the same.

To copy a user's record

1. On the Users toolbar, click the **Copy User** wizard  . The User Search window appears:



2. Search for the record that you want to copy. This is the same procedure we just discussed in the "User Search Helper" section.

3. Type or scan the **New ID**.

The screenshot shows a window titled "Copy User : Entering Info for Colose". At the top, it displays the user's current information: Name: Colose, Katie; Id: 3022393334; Group ID; Profile name: NCCNEWAD... Below this, it states "Creating new user by copying information from:" and shows "User ID: 3022393333". The main area has tabs for "Basic Info", "Privilege", "Demographics", "Addresses", and "Extended Info". The "Basic Info" tab is active, showing fields for Title, First name, Preferred name, Middle name, Last name (with "Colose" entered), Suffix, User ID (3022393334), Alt ID, Group ID, Library (HOCKESSIN), and Profile name (NCCNEWAD). There are checkboxes for "Use preferred name" (unchecked) and "Allow routing" (checked). At the bottom, there are three buttons: "Save (c)", "Clone/Copy This User to Another", and "Close (b)".

6. Type the new name, and make corrections as necessary, clicking each tab to access different fields of information.

7. When you've completed all changes, click **Save** to save the changes.

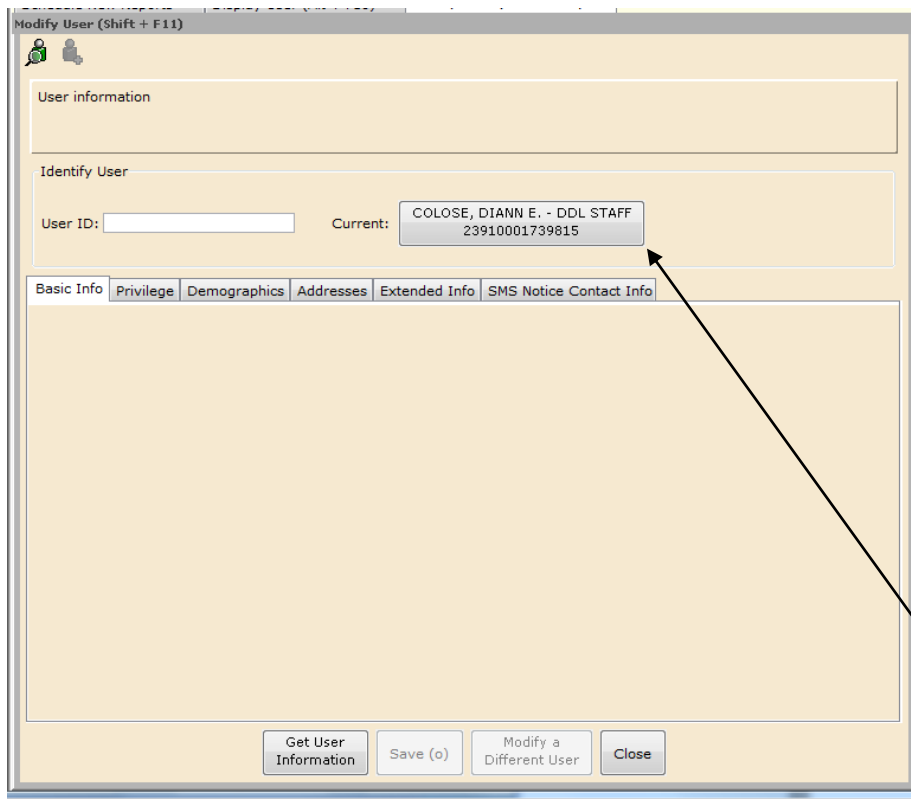
8. Click **Close** to exit the window.

Modify User Wizard

Use the **Modify User** wizard to edit information in an existing user record.

To modify a user

1. On the Users toolbar, click the **Modify User** wizard . The following window appears:



2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Display this User**. You may also click on the **Current:** box if it contains the name of the person whose record you wish to view. The following window appears and the display defaults to the Checkouts Tab:

Modify User (Shift + F11)

Notes

Name: COLOSE, DIANN E. - DDL STAFF
 Id: 23910001739815
 Group ID:
 Profile name: STAFF...

Identify User

User ID: 23910001739815

Home phone: 302-475-2221 EMAIL
 Street: 1906 HARWYN ROAD
 Email: decolose@netscape.net
 CITYSTZIP: WILMINGTON, DE 19810

Basic Info | Privilege | Demographics | Addresses | Extended Info | SMS Notice Contact Info

Title:
 First name: DIANN
 Preferred name: Use preferred name
 Middle name: E. - DDL STAFF
 Last name: COLOSE
 Suffix:
 User ID: 23910001739815
 Alt ID: Allow routing
 Group ID:
 Library: BRANDYWINE
 Profile name: STAFF

Get User Information | Save (o) | Modify a Different User | Close

3. Make corrections as necessary, clicking each tab to access different fields of information.

4. When you've completed all changes, click **Modify User** to save the changes.

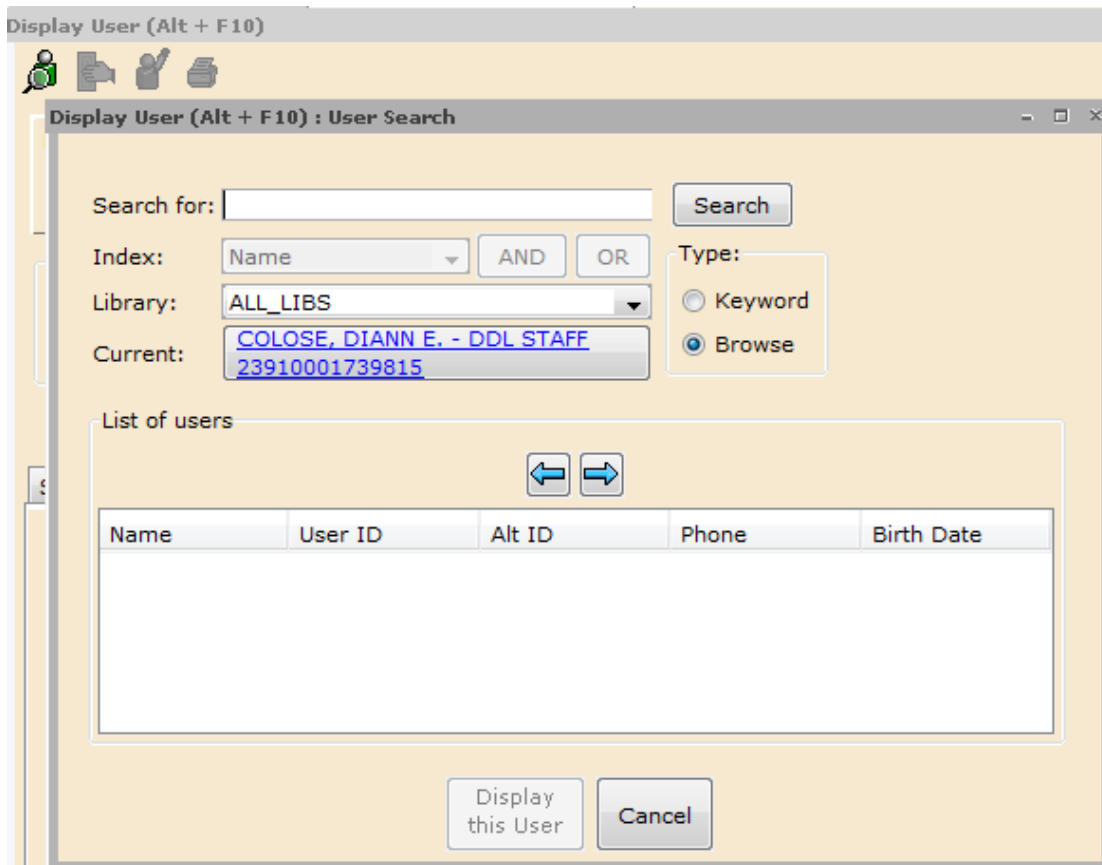
5. Click **Modify a Different User** or **Close**.

User Search Helper

The **User Search** helper is available from many windows in the Circulation module. You can use this helper to locate users when you do not have the User ID.

To locate a user when you do not have the User ID

1. Click the **User Search** helper . The following window appears:



Display User (Alt + F10)

Display User (Alt + F10) : User Search

Search for: Search

Index: Name AND OR Type: Keyword Browse

Library: ALL_LIBS

Current: COLOSE, DIANN E. - DDL STAFF
23910001739815

List of users

Name	User ID	Alt ID	Phone	Birth Date
------	---------	--------	-------	------------

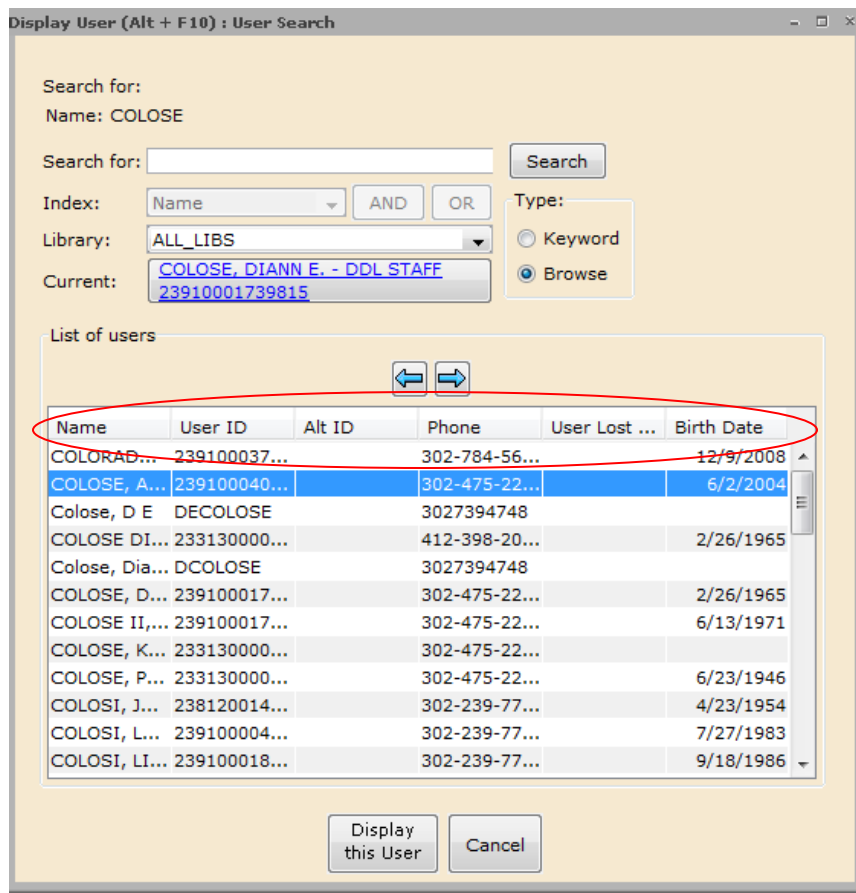
Display this User Cancel


2. In the **Search for** box, type the name or other criteria to search. The **Name** search allows searching by last name. Truncation is implied only in a Browse search. For example, performing a search on JOH will list users like JOHNS, JOHNSON, or JOHNSTON. **Browse** is the default but you can change it to **Keyword** and then search other indexes such as telephone and street.

3. In the **Index** box, select the Index you want to search after changing the Search **Type** to **Keyword**.

4. In the **Library** box, if you are in a multi-library setting, you can qualify the search by a single library or use the default All Libraries.

5. Click **Search**. All user records fitting the criteria you entered will display in the **List of users**:



6. You may sort the columns by clicking on the **Header Bar**. Multiple clicks re-sort them lowest to highest and back. The arrows  move you forward and backward through the results list.

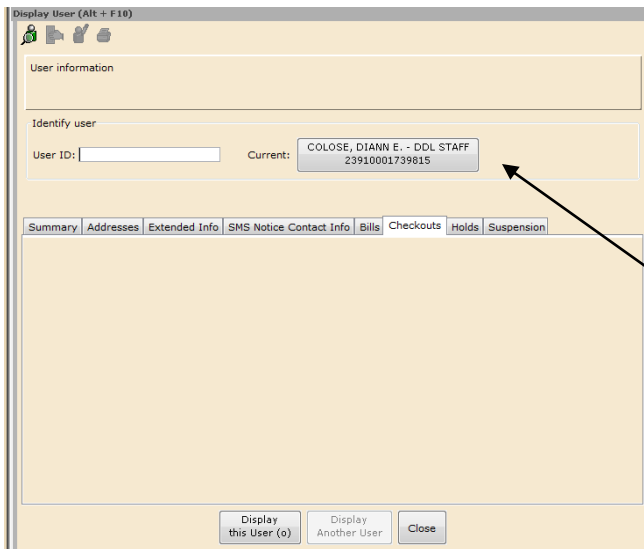
7. Once you identify the correct patron from the list, click to highlight the name and tap the **Enter** Key or click **Display this User** or **Double-click** on the name.

Display User Wizard

Use the **Display User** wizard to access patron information such as status, checkouts, holds and bills, and extended information. You can also take actions on the items checked out, holds placed while displaying the patron's record.

To locate a specific user

1. On the Users toolbar, click the **Display User** wizard . The following window appears:



Display User (Alt + F10)

User information

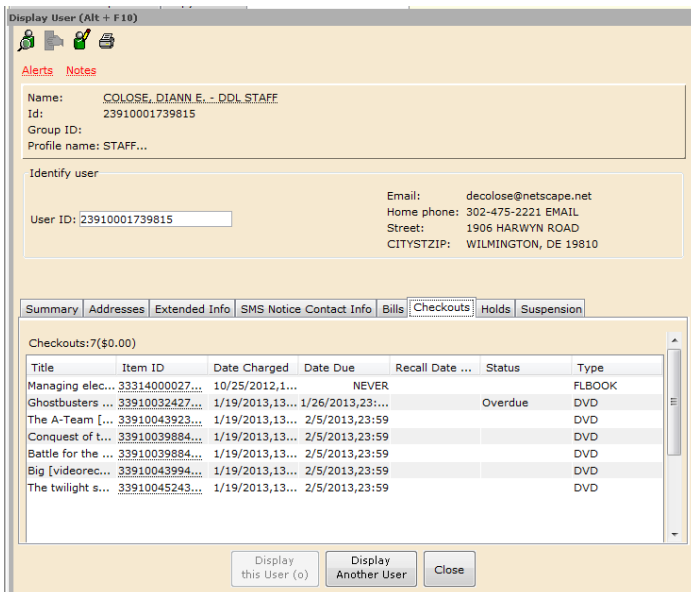
Identify user

User ID: Current: COLOSE, DIANN E. - DDL STAFF
23910001739815

Summary | Addresses | Extended Info | SMS Notice Contact Info | Bills | Checkouts | Holds | Suspension

Display this User (o) | Display Another User | Close

2. Scan the barcode from the user's card, or type the **User ID** and tap the **Enter** key or click **Display this User**. You may also click on the **Current:** box if it contains the name of the person whose record you wish to view. The following window appears and the display defaults to the Checkouts Tab:



Display User (Alt + F10)

Alerts Notes

Name: COLOSE, DIANN E. - DDL STAFF
Id: 23910001739815
Group ID:
Profile name: STAFF...

Identify user

User ID: 23910001739815 Email: decolose@netscape.net
Home phone: 302-475-2221 EMAIL
Street: 1906 HARWYN ROAD
CITYSTZIP: WILMINGTON, DE 19810

Summary | Addresses | Extended Info | SMS Notice Contact Info | Bills | Checkouts | Holds | Suspension

Checkouts:7(\$0.00)

Title	Item ID	Date Charged	Date Due	Recall Date ...	Status	Type
Managing elec...	33314000027...	10/25/2012,1...	NEVER			FLBOOK
Ghostbusters ...	33910032427...	1/19/2013,13...	1/26/2013,23:...		Overdue	DVD
The A-Team [...	33910043923...	1/19/2013,13...	2/5/2013,23:59			DVD
Conquest of t...	33910039884...	1/19/2013,13...	2/5/2013,23:59			DVD
Battle for the ...	33910039884...	1/19/2013,13...	2/5/2013,23:59			DVD
Big [videorec...	33910043994...	1/19/2013,13...	2/5/2013,23:59			DVD
The twilight s...	33910045243...	1/19/2013,13...	2/5/2013,23:59			DVD

Display this User (o) | Display Another User | Close

Checkouts Tab

The **Checkouts** Tab shows a list of items currently checked out to a patron including the Title, Item ID, Date Charged, Date Due, Status and Type of item.

You may sort the columns by clicking on the **Header Bar**. Multiple clicks re-sort them lowest to highest and back.

If you right-click on one of the items currently checked out you can perform the following actions:

The screenshot shows the 'Checkouts' tab in a library system. At the top, there are navigation tabs: Summary, Addresses, Extended Info, SMS Notice Contact Info, Bills, Checkouts (selected), Holds, and Suspension. Below the tabs, it says 'Checkouts:7(\$0.00)'. A table lists items with columns: Title, Item ID, Date Charged, Date Due, Recall Date, Status, and Type. The 'Ghostbusters I...' row is highlighted in blue and has a context menu open over it. The menu options are: Bill User for Item, Change Item ID, Claims Returned, Discharge, Display Holds, Display Item, Mark Item Lost, Mark Item Missing, Modify Due Date, Place Hold, Print Checkout Slip, Renew As Seen, and Renew As Unseen. Below the table, there are 'Display options' with radio buttons for 'Checkout library' and 'Owning library', and a 'Library:' dropdown menu set to 'All libraries'.

Title	Item ID	Date Charged	Date Due	Recall Date ...	Status	Type
Managing elec...	333140000278...	10/25/2012,15...	NEVER			FLBOOK
Ghostbusters I...	339100324275...	1/19/2013,13:14			Overdue	DVD
The A-Team [...]	339100439235...	1/19/2013,13:14				DVD
Conquest of th...	339100398847...	1/19/2013,13:14				DVD
Battle for the ...	339100398847...	1/19/2013,13:14				DVD
Big [videoreco...	339100439946...	1/19/2013,13:14				DVD
The twilight sa...	339100452435...	1/19/2013,13:14				DVD

You may also hold down the mouse and drag or use the **Shift** key and mouse to highlight multiple adjacent items or the **Control** key and mouse to highlight multiple separate items in the list.

This screenshot is similar to the previous one but shows multiple rows in the table highlighted. The context menu is still open over the 'Ghostbusters I...' row, showing the same list of actions as before. The 'Display options' and 'Library:' dropdown are also visible at the bottom.

Holds Tab

The **Holds** Tab shows a list of items currently on Hold for a patron including the Title, Item ID, Level of the hold (Title or Item), Status (available, unavailable, suspended), the date it was Placed, the pickup library, the date it needs to be Picked Up by if it is available, the date the hold Expires and the dates of any Suspended holds.

You may sort the columns by clicking on the **Header Bar**. Multiple clicks re-sort them lowest to highest and back.

If you right-click on one of the items currently checked out you can perform the following actions:

The screenshot shows the 'Holds' tab selected in a navigation bar. Below the navigation bar, it says 'Total holds:4'. A table lists the holds with columns: Title, Item ID, Level, Status, Placed, Pickup at, Pickup by, Expires, Suspen..., and Unsus... A context menu is open over the first row, listing actions: Bill User for Hold, Display Item, Modify Hold, Place Hold, and Remove Hold.

Title	Item ID	Level	Status	Placed	Pickup at	Pickup by	Expires	Suspen...	Unsus...
The bead...	3391004...	TITLE	Unavail	10/15/2012	DESTATE...		10/15/2013		
The dark...	3391004...	TITLE			2 BRANDY...		12/20/2013		
Men in bl...	3380400...	TITLE			2 BRANDY...		12/20/2013		
Abraham...	3331640...	TITLE			3 BRANDY...		1/6/2014		

Bills Tab

The **Bills** Tab shows a list of fines and fees owed by the patron. It includes the Title, Item ID, Reason for the bill, the amount still Owed, the total amount Billed, the Date of the bill and the library where any payments were made.

You may sort the columns by clicking on the **Header Bar**.

If you right-click on one of the items currently checked out you can perform the following actions:

The screenshot shows the 'Bills' tab selected in a navigation bar. Below the navigation bar, it says 'Paid and unpaid bills:2(\$0.00)'. A table lists the bills with columns: Title, Item ID, Reason, Owes, Billed, Date, and Payment library. A context menu is open over the second row, listing actions: Change Item ID, Display Item, Pay Bill, and Place Hold.

Title	Item ID	Reason	Owes	Billed	Date	Payment library
Cheese and culture :...	38720101117...	LOST	\$0.00	\$24.95	8/28/2012	DESTATELIB
Cheese and culture :...	38720101117...	PROCESSEFF	\$0.00	\$5.00	8/28/2012	DESTATELIB

Summary Tab

The **Summary** Tab shows the current standing of the patron's account.

Summary	Addresses	Extended Info	SMS Notice Contact Info	Bills	Checkouts	Holds	Suspension
Status is:	OK	Library card expires:	NEVER	Profile name:	STAFF	Group ID:	
Internet Access:	FULL...	Residency:	NEWCAST...	Misc/Major:	WHITE...	Gender:	FEMALE...
Education:	COLMAST...	Birth date:	2/26/1965	Library:	BRANDYWINE...	Age:	47
Language:	ENGLISH	Next allowed loan date:		Amount owed:	none	Credit balance:	none
Checkouts:	7	Unpaid bills:	none	Holds:	4	Routings:	none
Extended info:	yes	Orders:	none	Distributions:	none	Requests/messages:	none
Claims returned:	none						
Outreach user:	no						

Addresses Tab

The **Addresses** Tab shows the current addresses on file for the patron.

Summary	Addresses	Extended Info	SMS Notice Contact Info	Bills	Checkouts	Holds	Suspension
Primary:	1						
Address 1							
Email	Home phone	Street	CITYSTZIP				
decolose@netscape.net	302-475-2221 EMAIL	1906 HARWYN ROAD	WILMINGTON, DE 19810				

Extended Info Tab

The **Extended Info** Tab shows the current Notes on a patron's account.

Summary	Addresses	Extended Info	SMS Notice Contact Info	Bills	Checkouts	Holds	Suspension
Note:	BH LIBRARY PATRON - KEEP HER HOLDS ON THE SHELF HERE AT BH TO BE PICKED UP. SHE DOES NOT WANT THEM SENT TO DDL (DOVER). GW/BH 4/6/11						
Note:	Okay for husband to pick up materials.						
Note:	Juvenile card(s): Alicia Colose						

SMS Notice Contact Info Tab

The **SMS Notice Contact Info** Tab shows the current text messaging setup for a patron's account.

Summary	Addresses	Extended Info	SMS Notice Contact Info	Bills	Checkouts	Holds	Suspension
Phone Numbers							
Label	Country	Phone Number	Overdue Notice	Hold Pickup Notice	Bill Notice	Manual Message	User Announcements
Work Mobile	United States	3025556127	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

If any of the information on the Summary, Addresses, Extended Info or SMS Notice Contact Info Tabs needs to be corrected or updated, you can edit the record by clicking the **Modify User** helper.

Display User (Alt + F10)

Alerts Notes

Name: COLOSE, DIANN E. - DDL STAFF
 Id: 23910001739815
 Group ID:
 Profile name: STAFF...

Identify user

User ID:

Email: decolose@netscape.net
 Home phone: 302-475-2221 EMAIL
 Street: 1906 HARWYN ROAD
 CITYSTZIP: WILMINGTON, DE 19810

Summary Addresses Extended Info SMS Notice Contact Info Bills **Checkouts** Holds Suspension

Checkouts:7(\$0.00)

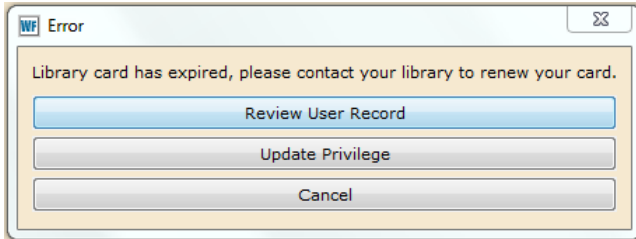
Title	Item ID	Date Charged	Date Due	Recall Date ...	Status	Type
Managing elec...	33314000027...	10/25/2012,1...		NEVER		FLBOOK
Ghostbusters ...	33910032427...	1/19/2013,13...	1/26/2013,23:...		Overdue	DVD
The A-Team [...	33910043923...	1/19/2013,13...	2/5/2013,23:59			DVD
Conquest of t...	33910039884...	1/19/2013,13...	2/5/2013,23:59			DVD
Battle for the ...	33910039884...	1/19/2013,13...	2/5/2013,23:59			DVD
Big [videorec...	33910043994...	1/19/2013,13...	2/5/2013,23:59			DVD
The twilight s...	33910045243...	1/19/2013,13...	2/5/2013,23:59			DVD

Display this User (o) Display Another User Close

Renewing Expired Cards Wizard

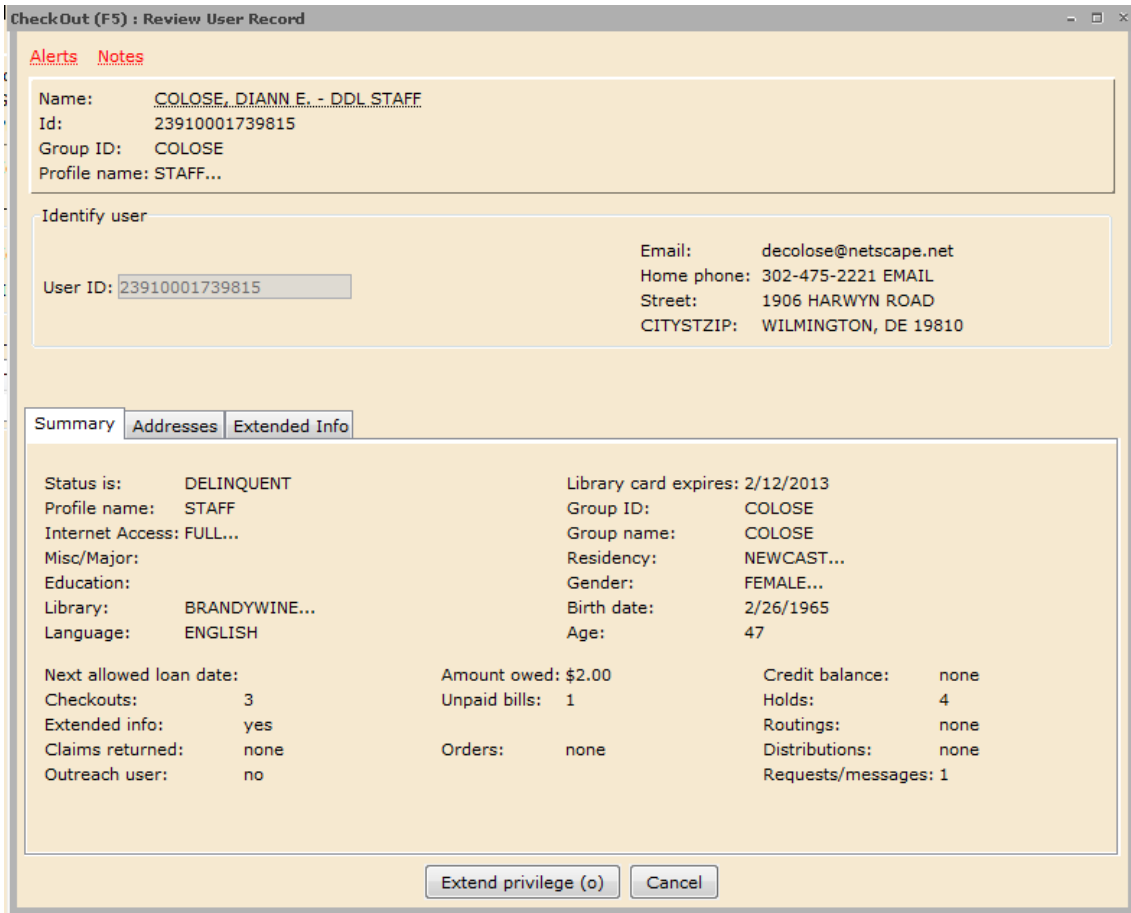
Each year a patron's library card needs to be renewed on the anniversary of its last renewal. All fines must be paid in full, the address and contact information must be updated if necessary and Notes that are no longer pertinent should be removed from the account.

At CheckOut the system will alert you with the following pop-up:



NOTE: Do not click Update Privilege

1. **Review User Record** is the default action if you tap the Enter key or it can be clicked to show the following pop-up:



Summary Tab

The **Summary** Tab contains a snapshot of the patron's account. Check the Status is:, Amount owed: and Unpaid bills: sections.

Summary | Addresses | Extended Info

Status is:	DELINQUENT	Library card expires:	2/12/2013
Profile name:	STAFF	Group ID:	COLOSE
Internet Access:	FULL...	Group name:	COLOSE
Misc/Major:		Residency:	NEWCAST...
Education:		Gender:	FEMALE...
Library:	BRANDYWINE...	Birth date:	2/26/1965
Language:	ENGLISH	Age:	47
Next allowed loan date:		Amount owed:	\$2.00
Checkouts:	3	Unpaid bills:	1
Extended info:	yes	Credit balance:	none
Claims returned:	none	Orders:	none
Outreach user:	no	Holds:	4
		Routings:	none
		Distributions:	none
		Requests/messages:	1

Extend privilege (o) Cancel

Addresses Tab

The **Addresses** Tab contains all of the addresses listed in the patron's account. Compare them to the driver's license or other documentation presented by the patron.

Summary | Addresses | Extended Info

Primary: 1

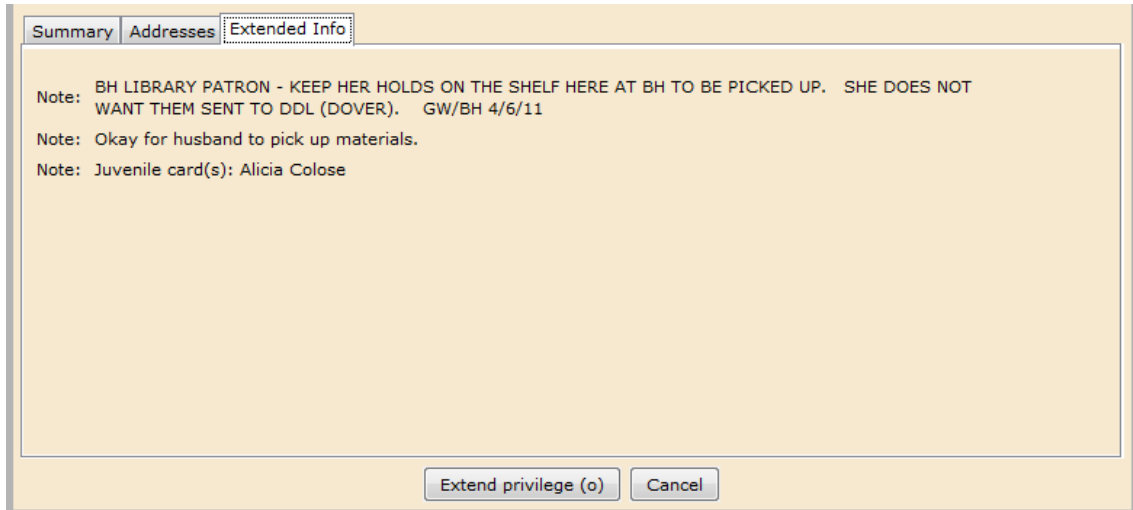
Address 1

Email	Home phone	Street	CITYSTZIP
decolose@netscape.net	302-475-2221 EMAIL	1906 HARWYN ROAD	WILMINGTON, DE 19810

Extend privilege (o) Cancel

Extended Info Tab

The **Extended Info** Tab contains the Notes that should be reviewed. If they are older, check with the patron to see if they are still necessary. If they pertain to partial returns, confirm that the items have been returned. (Check with your supervisor for the procedure in your library.)



The screenshot shows a software interface with three tabs: 'Summary', 'Addresses', and 'Extended Info'. The 'Extended Info' tab is active and contains three notes:

- Note: BH LIBRARY PATRON - KEEP HER HOLDS ON THE SHELF HERE AT BH TO BE PICKED UP. SHE DOES NOT WANT THEM SENT TO DDL (DOVER). GW/BH 4/6/11
- Note: Okay for husband to pick up materials.
- Note: Juvenile card(s): Alicia Colose

At the bottom of the window, there are two buttons: 'Extend privilege (o)' and 'Cancel'.

2. If all is in order, click the **Extend privilege** button, however, if there are issues to be addressed click the **Cancel** button.

3a. If a payment needs to be made, use the **Paying Bills Wizard** as directed in section BEG 4 of this manual.

3b. If the address or notes need to be changed, use the **Modify User Wizard** as directed on pages 11-14 of this section of the manual.

User Lost Card Wizard

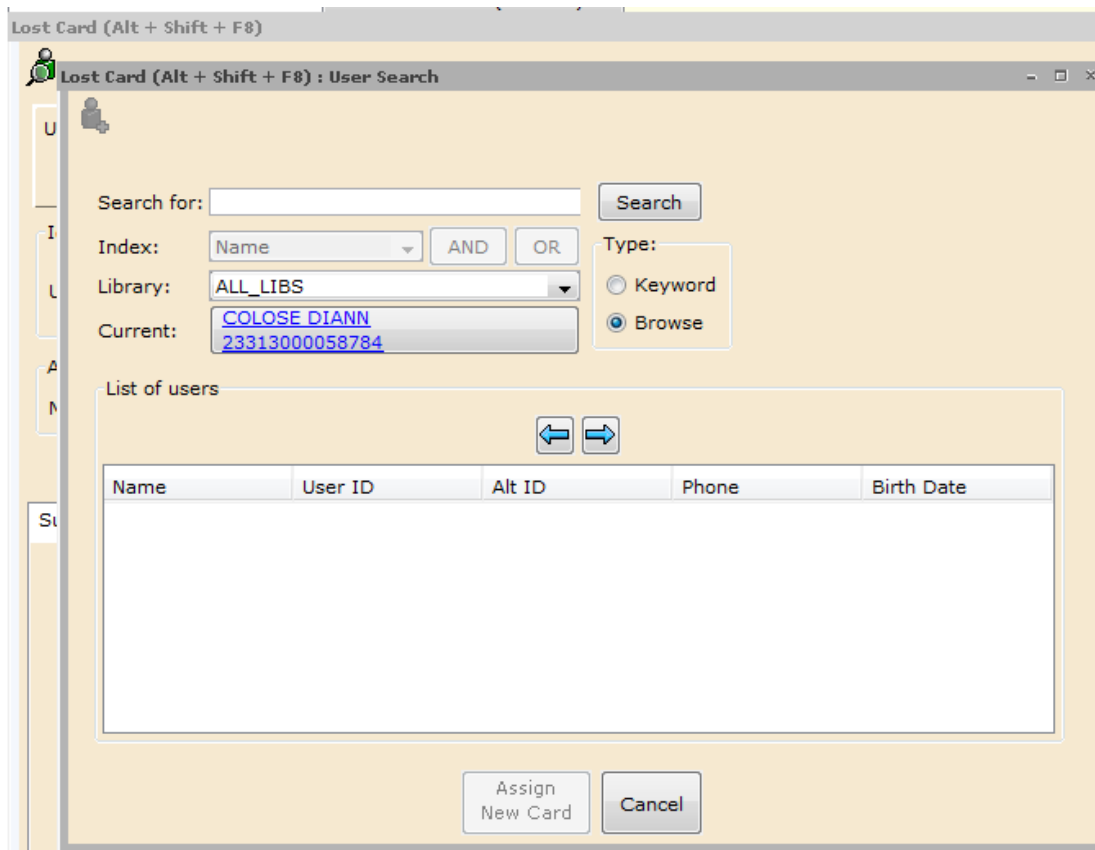
The **User Lost Card** wizard lets you inactivate a patron's lost library card and issue a new card. WorkFlows copies the patron information from the lost card to the new card. If the patron has checkouts, bills, or holds, these records are transferred to the new card.

****IMPORTANT****

DO NOT overwrite the existing user barcode with the new one.

To issue a new library card

1. On the Special toolbar, click the **User Lost Card** wizard . The User Search window appears with the User Lost Card window appears behind it:



Lost Card (Alt + Shift + F8)

Lost Card (Alt + Shift + F8) : User Search

U

I

L

A

M

St

Search for: Search

Index: Name AND OR Type: Keyword Browse

Library: ALL_LIBS

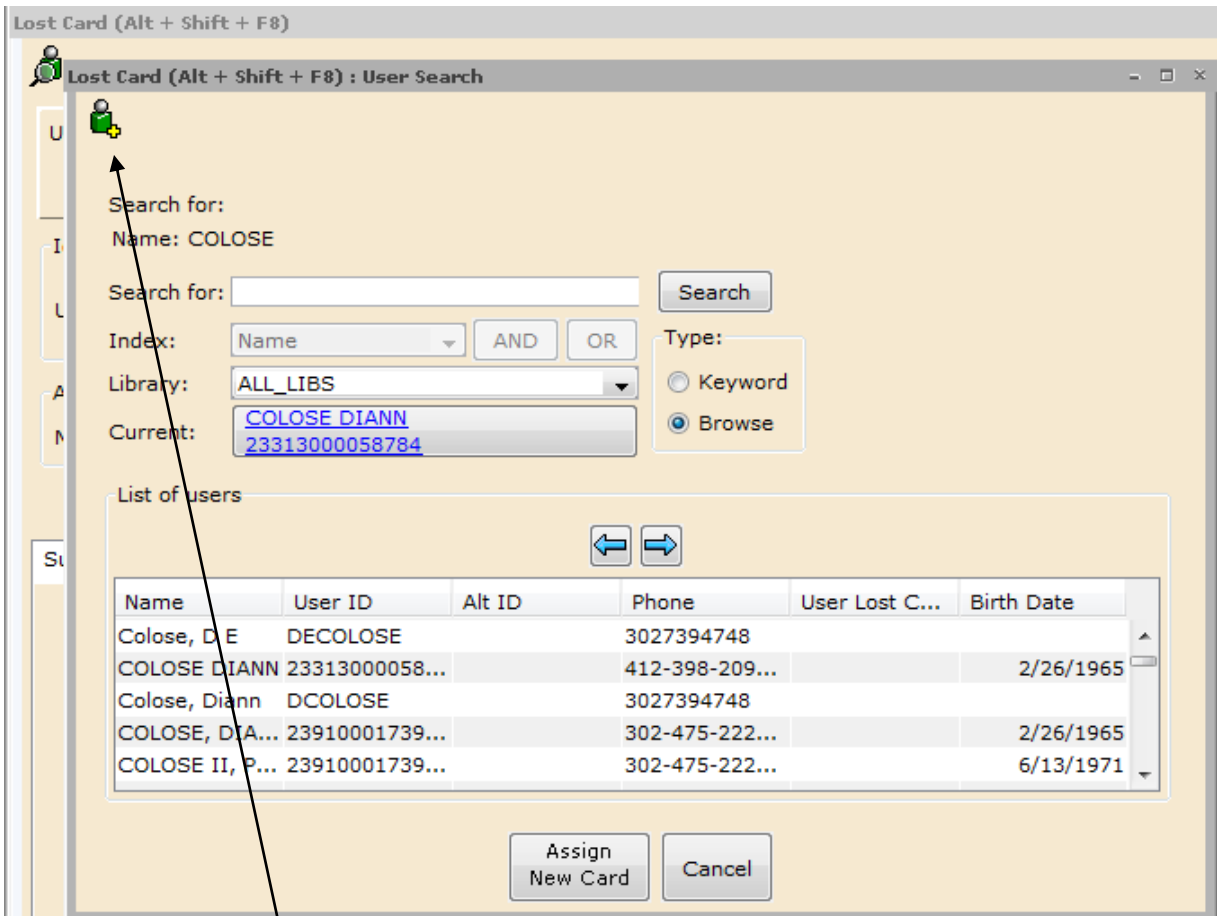
Current: COLOSE DIANN
23313000058784

List of users

Name	User ID	Alt ID	Phone	Birth Date
------	---------	--------	-------	------------

Assign New Card Cancel

2. On the **User Search** window, search for the user who has the lost card. If a hit list appears, click the appropriate user.



NOTE: If you have two users with the same name, click the **Display User** helper to get more information.

3. Once you determine the correct user, click **Assign New Card**. The User Search window closes, and the user information displays on the User Lost Card window.

Lost Card (Alt + Shift + F8)

Name: COLOSE DIANN
 Id: 23313000058784
 Group ID:
 Profile name: ADULT...

Identify user

User ID:

Email: DCOLOSE@NCCDE.ORG
 Home phone: 412-398-2098 Email Notification Available
 Street: 132 FAIRFAX BLVD
 CITYSTZIP: WILMINGTON DE 19803

Assign new ID to existing user

New user ID:

Summary | Addresses | Extended Info | Bills | Checkouts | Holds | Routings

Status is: OK
 Profile name: ADULT
 Internet Access: FULL...
 Misc/Major:
 Education:
 Library: DESTATELIB...
 Language: ENGLISH

Library card expires: 7/16/2013
 Group ID:
 Residency: NEWCAST...
 Gender: FEMALE...
 Birth date: 2/26/1965
 Age: 47

Next allowed loan date:
 Checkouts: none
 Extended info: none
 Claims returned: none
 Outreach user: no

Amount owed: none
 Unpaid bills: none
 Orders: none

Credit balance: none
 Holds: none
 Routings: none
 Distributions: none
 Requests/messages: none

Get User Information | Assign New Card (o) | Mark Another User's Card Lost | Close

4. Scan or type a **New user ID**, and click **Assign New Card**. The following confirmation message appears:

Complete

Bishop, Michael
 has been assigned user ID:6470

Lost user ID:6435
 has been deactivated with profile:LOSTCARD.

Mark Another User's Card Lost

Close

NOTE All of the user's checkouts, holds, and bills are transferred to the new card ID. If the new User ID number is not unique, an error message appears.