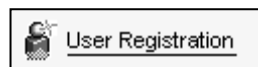


## User Registration

The User Registration wizard guides you through the process of registering a new user for your library.

**NOTE:** *Automatic Patron Update will keep your student records updated each night. New students will be automatically added but will not appear until the following day after the update runs. If you need to create faculty or a new student follow these steps, using dummy patron barcodes to assign the Patron ID #.*

1. **Click** on User Maintenance Wizard Group
2. **Click** on User Registration



If not using **Auto-Generated ID**, the User Registration screen displays.

**NOTE:** *If the wizard properties are set to not auto-generate a user ID, you can still auto-generate an ID by typing AUTO in the User ID box during registration.*

3. **Select** from the drop down menu the correct profile name. The user profile is based on your library's User Profile policies.
4. **Scan or Type** in the new user barcode number.

By default, the Duplicate Checking option is enabled to check by User Name and Student ID. If a duplicate is found, *the Duplicate User(s) found during Registration* screen displays.

If using **Auto-Generated ID**, the next available number will be added and the information screen will open ready to add your information.

**NOTE:** *Required fields appear highlighted.*

Use the folder tabs to add information about a user and his or her access.

The Basic Tab will be open.

5. **Type** the faculty/student name as formatted.
6. **Preferred name** – may be used if available. To have the preferred name display instead of the First Name field, **Click** the check box for User preferred name. Enter other fields as needed.

7. **Select** your library code, if not displayed, from the drop down menu.
8. **Select** the profile, if not previously selected, from the drop down menu.

9. The Privilege Tab should be left as system generated.

10. **Select** the Demographic Tab.

You may enter the Grade (when entering FACULTY\* users, selection FACULTY as the grade), Gender, Birth date and Department (Teacher).

**IMPORTANT NOTE: Do not change the drop down selections on the labels for the entries in Addresses and Extended Info. These are preset to work with the automatic patron update.**

Name: JAMESON, FRANK  
Id: 17299  
Homeroom:  
Profile name: FACULTY1...

Identify User  
User ID: 17299

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

Grade: FACULTY Job Title:  
Language: ENGLISH Gender: MALE  
Internet Use: INTERNET\_Y  
Teacher: Birth Date: NEVER  
Language: ENGLISH Age: 0

You can add additional information, such as notes and comments, on the Extended Information folder and the Addresses folder. Use the Before and After helper buttons to add entry fields before or after the field in which your cursor is positioned. Use the Delete helper button to delete an entry field.

11. **Select** the Addresses Tab

12. **Enter** the address information if applicable.

You may enter a second address if applicable. This is not updated by the system.

Address 3 - this information has been added to allow for additional information you may wish to enter. This will not be replaced by nightly update.

Name: JAMESON, FRANK  
Id: 17299  
Homeroom:  
Profile name: FACULTY1...

Identify User  
User ID: 17299

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

Primary: Address 1 Address 2 Address 3

Address 1

ATTN  
ADDRESS  
CITY  
STATE  
ZIP  
PHONE  
EMAIL

13. **Select** the Extended Info tab to add a comment or note.

14. To remove an entry in a comment or note, you must **select** the Delete Row helper.

**NOTE:** *The extended information will display on the user screen when you click on the Notes glossary. This will not be changed by the patron update.*

15. When all information is completed, **click** the Check Duplicate User button.

**NOTE:** Check Duplicate may be turned off in properties.

16. If there are no duplicate users, a message will appear stating “No duplicate users found”. **Click** OK. The Register User button will turn black and then you’ll be able to **click** it to complete the user’s registration.

**Note:** For more detailed information or specific questions, use HELP wizard.