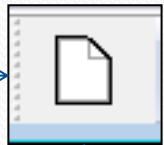
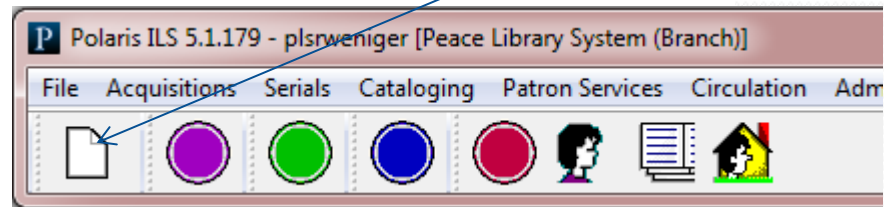
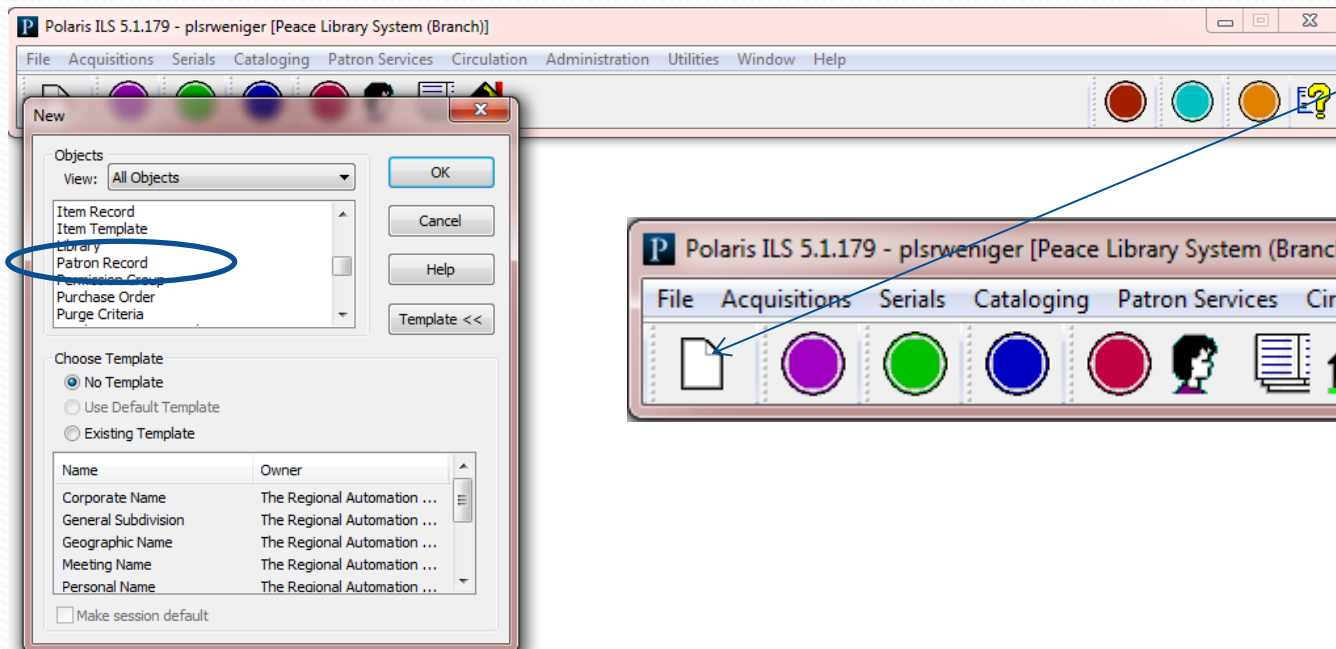


Polaris Patron Registration



Registering a New Patron

- Login to Polaris.
- Click On “File” and then on “New”, then choose “Patron Record” from the alphabetical dropdown list,
- OR, start with a click on the “New File” icon. 



New Patron Registration Workform

Note the four workform view icons on the left banner:

- Address and Phone
- General
- Status
- Custom Data

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: [] Registered at: Peace Library System (Branch) (APRPLS)

Last name: [] Patron code: Adult

First name: []

Middle name: []

Title: [] Suffix: [] Expiration: Term: 1 years Date: 11/07/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country

Address Check

Term: 1 years Date: 11/07/2017

Notices address: (None) Phone 1: [] [] TXT

Notification option: Mailing Address Phone 2: [] []

Additional TXT notice [] Phone 3: [] []

eReceipt option: (None) FAX number: []

Email address: [] Alt Email address: []

For Help, press F1 NUM

Click on each of the four icons and watch how the bottom half of the workform changes for gathering more information about the new patron.

Registering a New Patron: Name and Barcode

- Scan the barcode number from their new library card into the workform.
- Enter their full legal name as shown on the patron's government issued ID.
- Choose the correct patron code from the dropdown list.

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode:

Registered at: Peace Library System (Branch) (APRPLS)

Patron code: Adult

Expiration: Term: 1 years Date: 22/11/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
Address and Phone							

Address Check

Term: 1 years Date: 22/11/2017

Notices address: (None)

Notification option: Mailing Address

Additional TXT notice ☐

eReceipt option: (None)

Email address:

Alt Email address:

Phone 1: ☐

Phone 2: ☐

Phone 3: ☐

FAX number:

Add... Edit... Remove Mailing Label

For Help, press F1 NUM

Registering a New Patron: The Address

If the **government issued ID** showing their **full legal name** does not have their current mailing address, ask for a household utility bill or lease agreement.

Click on “Add” to fill in the mandatory address field.

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: []

Last name: []

First name: []

Middle name: []

Title: [] Suffix: []

Registered at: Peace Library System (Branch) (APRPLS)

Patron code: Adult

Expiration: Term: 1 years Date: 11/07/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County
[Empty row]						

Address Check

Term: 1 years Date: 11/07/2017

Notices address: (None)

Notification option: Mailing Address

Additional TXT notice []

eReceipt option: (None)

Email address: []

Alt Email address: []

Phone 1: []

Phone 2: []

Phone 3: []

FAX number: []

Add... Edit... Remove Mailing

Add/Edit Address

Address:

Type: Home

Country: Canada

Postal code: []

Street 1: []

Street 2: []

City: []

County: []

State/province: []

OK Cancel

For Help, press F1

NUM

Registering a New Patron: The Address

Enter the postal code. This auto-populates the City and Province. (If the patron's postal code is not recognized, use your library's postal code and contact PLS to have the patron's postal code added.) Enter the street address, and **click on OK to save.**

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode:

Last name:

First name:

Middle name:

Title: Suffix:

Registered at: Peace Library System (Branch) (APRPLS)

Patron code: Adult

Expiration: Term: 1 years Date: 11/07/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County
<div>Address Check</div> <div>Term: 1 years Date: 11/07/2017</div> <div>Notices address: (None)</div> <div>Notification option: Mailing Address</div> <div><input type="checkbox"/> Additional TXT notice</div> <div>eReceipt option: (None)</div> <div>Email address: <input type="text"/></div> <div>Alt Email address: <input type="text"/></div> <div>Phone 1: <input type="text"/></div> <div>Phone 2: <input type="text"/></div> <div>Phone 3: <input type="text"/></div> <div>FAX number: <input type="text"/></div> <div>Add... Edit... Remove Mailing</div>						

Add/Edit Address

Address:

Type: Home

Country: Canada

Postal code:

Street 1:

Street 2:

City:

County:

State/province:

OK Cancel

For Help, press F1

NUM

Registering a New Patron: Phone Number(s)

Enter the phone number(s).

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Registration

Barcode:

Last name:

First name:

Middle name:

Title: Suffix:

Registered at: Peace Library System (Branch) (APF)

Patron code: Adult

Expiration: Term: 1 years

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County

Address Check

Term: 1 years Date: 22/11/2017

Notices address: (None)

Notification option: Mailing Address

☐ Additional TXT notice

eReceipt option: (None)

Email address:

Alt Email address:

Phone 1: (None) AT&T Bell Canada Bell South Cellular One Chatr Cingular (Now AT&T) Eastlink Fido Helio Koodo MetroPCS Nextel PC Telecom Rogers AT&T Wireless Rogers Canada Southwestern Bell Sprint T-Mobile Telus Tracfone USA Mobility Verizon Virgin Mobile Virgin Mobile Canada Wind Mobile

Phone 2:

Phone 3:

FAX number:

TXT ☒

Enter the patron's primary phone number (and any additional phone numbers, if provided).

For cell phones:

- Choose the provider from the dropdown list.
- Click the TXT box for text-able numbers.

Registering a New Patron: Email Address(es) and Notification

Enter email address(es). Choose the **notification option** preferred from the dropdown list.

The default notification option is “Mailing address”, but this requires the library to pay postage.

Encourage choosing:

- Email
- Phone 1 (telephony*)
- TXT Messaging

Don't select FAX; not enabled

Polaris will then email, phone (telephony) or send text notifications [holds, almost overdue, card almost expired] to patrons.

*Telephony (automated voice messages by telephone) can be set up for your library by the PLS IT manager.

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: [] Registered at: Peace Library System (Branch) (APRPLS)

Last name: [] Patron code: Adult

First name: []

Middle name: []

Title: [] Suffix: []

Expiration: Term: 1 years Date: 11/07/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country

Address Check

Term: 1 years Date: 11/07/2017

Add... Edit... Remove Mailing Label

Notices address: (None)

Notification option: Mailing Address

eReceipt option: Email Address

Phone 1: [] [] []

Phone 2: [] [] []

Phone 3: [] [] []

FAX number: []

Email address: [] Alt Email address: []

For Help, press F1

NUM

Registering a New Patron: Additional TXT Notification

If the patron wants to add TXT messaging as an additional notification option:

- Click the box for “Additional TXT notice”.
- Make sure the cell phone number, provider, and TXT box are completed.

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: Last name: First name: Middle name: Title: Suffix: Registered at: Peace Library System (Branch) (APRPLS) Patron code: Adult Expiration: Term: 1 years Date: 22/11/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country
------	------------	------------	------	-------	-------------	--------	---------

Address Check

Term: 1 years Date: 22/11/2017

Notices address: (None) Notification option: Email Address Additional TXT notice eReceipt option: (None) Email address:

Phone 1: Phone 2: Phone 3: FAX number: Alt Email address:

For Help, press F1 NUM

Registering a New Patron: The eReceipt option

The default eReceipt option is None.

If the patron desires an eReceipt, from the drop down menu choose Email Address, TXT Messaging, or All. The patron will receive eReceipts of their transactions for item checkouts and payment of account charges.

If choosing TXT Messaging, make sure the cell phone number, provider, and TXT box are completed.

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode: Registered at:

Last name: Patron code:

First name:

Middle name:

Expiration: Term: years Date:

Title: Suffix:

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country

Address Check

Term: years Date:

Notices address:

Notification option:

☐ Additional TXT notice

eReceipt option:

- (None)
- Email Address
- TXT Messaging
- <All>

Phone 1: ☐

Phone 2: ☐

Phone 3: ☐

FAX number:

Alt Email address:

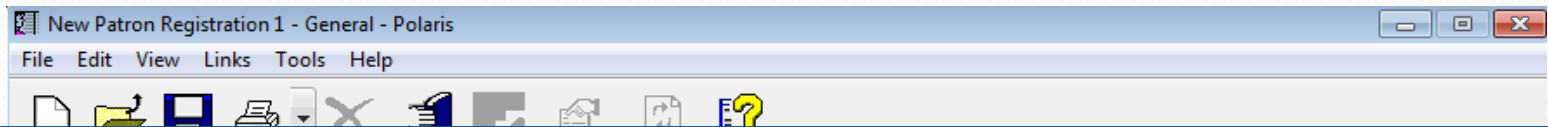
Buttons: Add... Edit... Remove Mailing Label

For Help, press F1

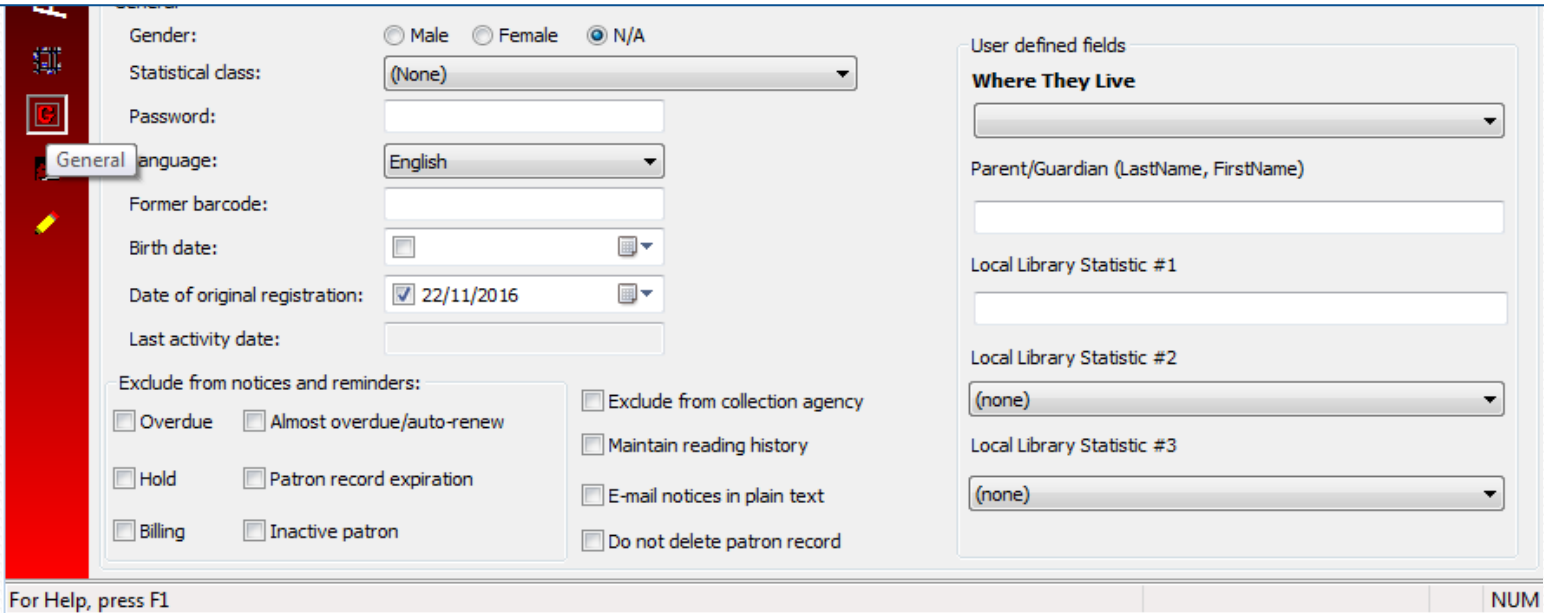
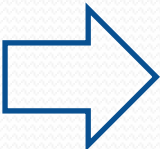
NUM

Registering a New Patron:

Switch to the banner's “General” view



The bottom half of the window provides fields for gender, statistical class, password, language, birthdate, Where they live, Parent/Guardian (for patrons under the age of 18), a check box to receive email notices in plain text, a check box if the patron wants Polaris to keep a list of the books they have checked out...



Gender: ☐ Male ☐ Female ☒ N/A

Statistical class: (None)

Password:

language: English

Former barcode:

Birth date:

Date of original registration: ☒ 22/11/2016

Last activity date:

Exclude from notices and reminders:

☐ Overdue ☐ Almost overdue/auto-renew ☐ Exclude from collection agency

☐ Hold ☐ Patron record expiration ☐ Maintain reading history

☐ Billing ☐ Inactive patron ☐ E-mail notices in plain text

☐ Do not delete patron record

User defined fields

Where They Live

Parent/Guardian (LastName, FirstName)

Local Library Statistic #1

Local Library Statistic #2 (none)

Local Library Statistic #3 (none)

For Help, press F1

NUM

Registering a New Patron: The Patron's Password

- Gender - optional
- Statistical class – optional
- **PASSWORD** – Polaris will automatically insert the password in 24 hours. But if your patron wants to begin requesting items through TRACpac or downloading from eResources immediately, you must manually enter the last four digits of the patron's phone number (e.g. 7503)
- Language - optional
- Birthdate – optional (Click on the calendar, start with the year, then the month and finally the date)

The screenshot shows the 'New Patron Registration 1 - General - Polaris' window. The interface includes a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with icons for file operations. A vertical red sidebar on the left contains the word 'Registration' and several icons. The main form area is divided into sections: 'Barcode', 'Last name', 'First name', 'Middle name', 'Title', and 'Suffix'. Below these is the 'General' section, which includes 'Gender' (radio buttons for Male, Female, N/A), 'Statistical class' (a dropdown menu currently showing '(None)'), 'Password' (a text field circled in blue), 'Language' (a dropdown menu showing 'English'), 'Former barcode', 'Birth date' (with a calendar icon), 'Date of original registration' (with a date of 11/07/2016 and a calendar icon), and 'Last activity date'. At the bottom, there are checkboxes for 'Exclude from notices and reminders' (Overdue, Almost overdue/auto-renew, Hold, Patron record expiration, Billing, Inactive patron) and 'Exclude from collection agency' (Maintain reading history, E-mail notices in plain text, Do not delete patron record). A footer at the bottom of the window says 'For Help, press F1'.

Registering a New Patron:

The Reading History and Plain Text Email

- **Maintain Reading History**

Instruct the new patron to switch “Maintain Reading History” on themselves, if desired, by going into their “My Account” in TRACpac. Reading History can be accessed by Law enforcement personnel without patron consent. By switching it on themselves, patrons acknowledge this and library staff are protected.

- **Email notices in plain text**

Check this box if the patron prefers plain text rather than HTML for Email.

New Patron Registration 1 - General - Polaris

File Edit View Links Tools Help

Barcode: _____ Registered a
Last name: _____ Patron code
First name: _____
Middle name: _____
Title: _____ Suffix: _____

General

Gender: ☐ Male ☐ Female ☒ N/A
Statistical class: (None)
Password: _____
Language: English
Former barcode: _____
Birth date: _____
Date of original registration: ☒ 11/07/2016
Last activity date: _____

Exclude from notices and reminders:

☐ Overdue ☐ Almost overdue/auto-renew ☐ Exclude from collection agency
☐ Hold ☐ Patron record expiration ☐ Maintain reading history
☐ Billing ☐ Inactive patron ☐ E-mail notices in plain text
☐ Do not delete patron record

For Help, press F1

Registering a New Patron:

“Where They Live” and “Parent/Guardian”

Where They Live - required

- If the patron’s municipality, reserve or Métis settlement of residence is not in the pulldown list, select “Not in List” and advise the PLS IT Manager to add it.
- If the patron resides in a municipality that is not a member of PLS, select “Not in System” and a Patron Code of “Non-System” must also be selected.

The screenshot shows a web-based form for registering a new patron. The form includes the following fields and sections:

- Library:** A dropdown menu with "Peace Library System (Branch) (APRPLS)" selected.
- Age Group:** A dropdown menu with "Adult" selected.
- Expiration:** A section with "Term" set to "1" years and "Date" set to "11/07/2017".
- User defined fields:** A section containing a dropdown menu labeled "Where They Live", which is highlighted with a blue box and an arrow pointing to the text "Where They Live" in the left-hand list.
- Parent/Guardian (LastName, FirstName):** A text input field.
- Local Library Statistic #1:** A text input field.
- Local Library Statistic #2:** A dropdown menu with "(none)" selected, with an arrow pointing to it from the text "Field #2" in the right-hand list.
- Local Library Statistic #3:** A dropdown menu with "(none)" selected, with an arrow pointing to it from the text "Field #3" in the right-hand list.

At the bottom right of the form, the text "NUM" is visible.

- **Parent/Guardian - required** if the new patron is under the age of 18. The parent/guardian is billed when overdue fines or charges for items that are lost/damaged are incurred by the minor.
- **Statistics fields** can be customized by the PLS IT manager for each library. Field #1 is free text. Contact the IT manager to customize fields #2 and #3 for you.

Registering a New Patron

Remember
to **Save**
your work!



Questions?

Call PLS and
talk to a
member of the
consulting
team!

780-538-4656
1-800-422-6875

New Patron Registration 1 - Addresses - Polaris

File Edit View Links Tools Help

Barcode:

Last name:

First name:

Middle name:

Title: Suffix:

Registered at: Peace Library System (Branch) (APRPLS)

Patron code: Adult

Expiration: Term: 1 years Date: 11/07/2017

Addresses, Phone Numbers

Type	Street One	Street Two	City	State	Postal Code	County	Country

Address Check

Term: 1 years Date: 11/07/2017

Add... Edit... Remove Mailing Label

Notices address: (None)

Notification option: Mailing Address

☐ Additional TXT notice

eReceipt option: (None)

Email address:

Phone 1:

Phone 2:

Phone 3:

FAX number:

Alt Email address:

For Help, press F1

NUM