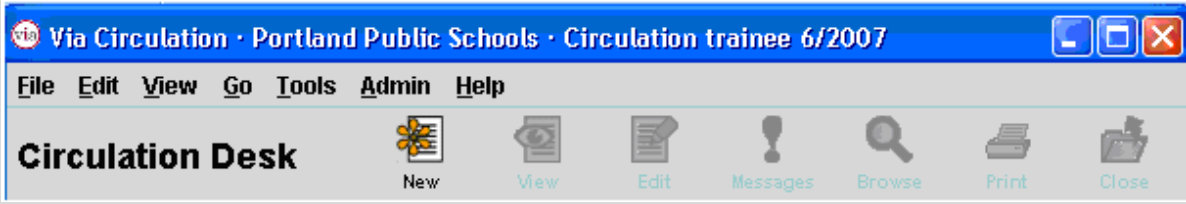


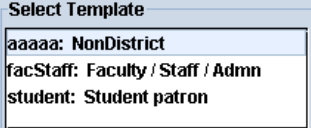
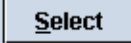


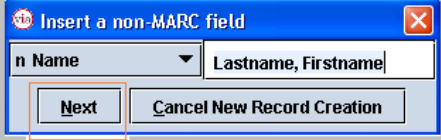


# Portland Public Schools



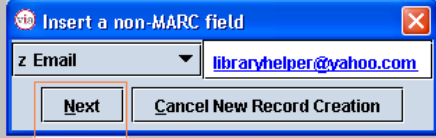

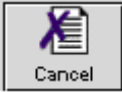
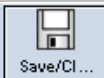
## Via Circulation Quick Reference Guide

### Create a New Patron

Following are step-by-step instructions for creating a new patron. This process will be used primarily for adding volunteers, mentors, and other non-district staff library helpers/users.

		
 <b>From the Circulation Desk Mode:</b>		
<b>Step 1</b>	Click on the <b>New</b> button to begin the <i>Create a New Patron</i> process.	
<b>Step 2</b>	Click on the correct New Patron template to select it. <i>Student and staff patron records will be updated automatically through a daily eSIS trickle feed.</i>	
<b>Step 3</b>	Once a template is highlighted, click on the <b>Select</b> button.	
<b>Step 4</b>	A template wizard will activate, prompting you for specific information. The first prompt is for <b>Home Library</b> . Key in your library's 3 digit location code.	
<b>Step 5</b>	Click on the <b>Next</b> button to move to the next prompt. <i>To cancel the creation of the new record at any time, click on the <b>Cancel New Record Creation</b>.</i>	
<b>Step 6</b>	In the <b>Name</b> prompt field highlight the placeholder text and type the patron's last name and then first name, exactly as shown in the placeholder text. Click on the <b>Next</b> button to continue.	

**CONTACT THE PROFESSIONAL LIBRARY FOR ASSISTANCE, ext. 3267 or [proflib@pps.k12.or.us](mailto:proflib@pps.k12.or.us)**

<p><b>Step 7</b></p>	<p>In the <b>Address</b> prompt field type the patron's address if available.</p> <p>Click on the <b>Next</b> button to continue.</p>																																											
<p><b>Step 8</b></p>	<p>In the <b>Telephone</b> prompt field type the patron's telephone if available.</p> <p>Click on the <b>Next</b> button to continue.</p>																																											
<p><b>Step 9</b></p>	<p>In the <b>Email</b> prompt field type the patron's email address if available.</p> <p>Click on the <b>Next</b> button to continue.</p>																																											
<p><b>Step 10</b></p>	<p>In the <b>Note</b> prompt field you can enter any additional information about the patron that is appropriate (i.e., volunteer, community helper, student teacher, etc.).</p> <p>Click on the <b>Next</b> button to continue.</p>																																											
<p><b>NOTE</b></p>	<p>The patron data can be edited from this screen if necessary.</p> <p>To clear the data and delete the record, click on the <b>Cancel</b> button in the toolbar.</p> 	<table border="1"> <thead> <tr> <th>New PATRON</th> <th>Last Updated: 08-30-2007</th> <th>Created: 08-30-2007</th> <th>Revisions</th> </tr> </thead> <tbody> <tr> <td>Expiration Date</td> <td>- -</td> <td>Current Checkouts</td> <td></td> </tr> <tr> <td>Patron Code 1</td> <td>- -</td> <td>Birth Date</td> <td>- -</td> </tr> <tr> <td>Patron Code 2</td> <td>- -</td> <td>Home Library</td> <td>6d9e Abernethy</td> </tr> <tr> <td>Patron Code 3</td> <td>0 NA</td> <td>Patron Message</td> <td>- NO MESSAGE</td> </tr> <tr> <td>Patron Type</td> <td>10 STUDENT 10TH</td> <td>Manual Block</td> <td>- -</td> </tr> <tr> <td>Total Checkouts</td> <td></td> <td>Claims Returned</td> <td></td> </tr> <tr> <td>Total Renewals</td> <td></td> <td>Money Owed</td> <td>\$0.00</td> </tr> </tbody> </table> <table> <tr> <td>Name</td> <td>Guest, Test</td> </tr> <tr> <td>Address</td> <td>12345 Fantasy Lane Portland, OR 97227</td> </tr> <tr> <td>Telephone</td> <td>503-916-2000</td> </tr> <tr> <td>Email</td> <td>libraryhelper@yahoo.com</td> </tr> <tr> <td>Barcode</td> <td>NOTREQUIRED</td> </tr> </table>	New PATRON	Last Updated: 08-30-2007	Created: 08-30-2007	Revisions	Expiration Date	- -	Current Checkouts		Patron Code 1	- -	Birth Date	- -	Patron Code 2	- -	Home Library	6d9e Abernethy	Patron Code 3	0 NA	Patron Message	- NO MESSAGE	Patron Type	10 STUDENT 10TH	Manual Block	- -	Total Checkouts		Claims Returned		Total Renewals		Money Owed	\$0.00	Name	Guest, Test	Address	12345 Fantasy Lane Portland, OR 97227	Telephone	503-916-2000	Email	libraryhelper@yahoo.com	Barcode	NOTREQUIRED
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<p><b>Step 12</b></p>	<p>Click on the <b>Save/Cl...</b> button in the toolbar once all the data has been entered.</p> <p>The new patron's record will be open and ready to check out material.</p>	 <table border="1"> <tr> <td>Key or Scan Item or...</td> <td>Name</td> <td>Guest, Test</td> </tr> <tr> <td><input type="text"/></td> <td>Patron Type</td> <td>10 STUDENT</td> </tr> <tr> <td><input type="button" value="Search"/></td> <td>Home Library</td> <td>6d9 Abernethy</td> </tr> </table>	Key or Scan Item or...	Name	Guest, Test	<input type="text"/>	Patron Type	10 STUDENT	<input type="button" value="Search"/>	Home Library	6d9 Abernethy																																	
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<p><b>Step 13</b></p>	<p>Click on the <b>Close</b> button to close the new patron record.</p> <p>The new patron's record will be closed and you can select your next action in Circulation.</p>	