

Real Life Library Scenario New patron approaches the circulation desk and requests a card.

Assignment If you did not create a new patron during your on-site training, use the User Registration **wizard** to create an account for a new patron. If you created a user already, use the Modify User wizard to finish adding (imaginary) address information for your user.

Instructions For this exercise, we will create a patron with the last name of **Practice**.

1. Open the User toolbar on the left side of the Workflow screen by clicking on the white arrow next to the word 'Users.'
2. Click on the User Registration Wizard.
3. Assign your patron a user ID. You may use an actual bar-coded library card, or create your own user ID. User ID's may be any combination of letters and numbers, so make one that is easy to remember such as **Julie123**. Click on [OK] to proceed.
4. Using the tabs to proceed, complete the following information:
 - On the BASIC INFO screen, change Profile to ADULT and choose your library from the drop down list.
 - On the PRIVILEGE screen, change the privilege date and PIN. Use the word TRAINDAY as an override code.
 - On the Demographics screen, choose gender/age in CAT 2 and set the patron's birthdate using the gadget (diamond) button.
 - On the ADDRESSES screen, fill out all of address 1.
 - On the EXTENDED INFO screen, add a Note and a Comment
5. Click on [Register User] to complete the process.

NOTE: If you are modifying an existing patron, ensure that all of the above is completed, then click [Modify User] to complete the process.

Terms and Definitions: Wizards are buttons on toolbars that guide you through the steps to perform a specific task. They are located on the left side of the Workflows screen.

Wizard