



Patron Registration

To create a patron registration first ensure that **no patron record already exists** for that patron.

To do this type the full name of the patron into the quick search bar.

1. Click on the **new patron** button located under the quick search bar.
 NEW PATRON
2. This opens the patron registration workflow. All content for the patron registration form is on one page. On the left is a **dashboard** indicating the sections of the workflow.

3. Required fields are indicated by the **asterisks**. You will be unable to save the patron if any of these fields are left blank. It is best practice to fill out other fields in addition to the

required fields such as email and phone number.

- a. **Profile:** you are required to enter the barcode, last name and first name in normal title case, Registration library, patron code (most commonly used are Adult, Junior, and print disabled), and statistical class to identify their county or community.
 - b. **Attributes:** no required fields.
 - c. **Email:** no required fields but strongly suggested for notifications, eResources, and promotional reasons.
 - d. **Address:** start with the postal code, with a space, and the other required fields will generate appropriate information. Polaris references Canada post and thus contains all correct postal codes. You can add a second address by clicking **address**.
 - e. **Phone/fax:** no required fields but strongly suggested for notifications reasons.
 - f. **Notification settings:** the default setting is email, but can be changed by clicking the field and selecting the preferred notification options. If you select **Text message** as Notification Option and or **additional TXT notice** you must select the appropriate phone and add a wireless carrier.
 - g. **Preferences:** to exclude a patron from notifications select appropriate boxes. This will ensure your patron does NOT receive those notices. You may also check **maintain reading history**
 - h. **Password:** is required to access the public access catalog. This is typically defaulted to the last four digits of the phone number.
4. When you have completed the registration form, form click **save**.