

# Create Patron Record

The screenshot displays the library management system interface for Elmwood Park Middle/High School. The top navigation bar includes the BLS logo, the school name, and links for Home, Dashboard, Catalog, Circulation, Reports, Back Office (circled in red), and Messages. The 'Back Office' tab is active. On the left, a sidebar menu lists various management functions, with 'Manage Patrons' (circled in red) selected. The main content area shows a search bar with a 'Search' button and a 'New Patron' button (circled in red) in the top right corner. A footer at the bottom contains copyright information: ©2002-2016 Follett School Solutions, Inc. 14\_0\_0\_AU2 12/28/2016 11:32 AM EST.

**Step 1: In the Back Office tab under Manage Patrons click New Patron button.**

**BELS** School Library Consortium  
Elmwood Park Middle/High School

Home Dashboard Catalog Circulation Reports Back Office Messages

Manage Patrons > New Patron

Manage Patrons  
Update Patrons  
Import Patrons  
Export Patrons  
Manage Homerooms  
Upload Patron Pictures  
Library Policies  
Access Levels  
Calendar / Hours  
Site Configuration  
Inventory  
Job Manager

How do I... ?

General Address Picture

Save Cancel

\* Required Field

**Patron Information**

\* Last Name

Middle Name

\* District ID

Gender

Birthdate

Grad Year

Grade Level

First Name

Nickname

Email 1

Email 2

User Name

New Password

Confirm Password

**Site Information**

\* Barcode

Assign next barcode [Next: P 121051]

Patron Type

Access Level

Status

Card Expires

Homeroom

User Defined 1

User Defined 2

User Defined 3

User Defined 4

User Defined 5

Acceptable Use Policy on File?  Yes

Print Label on Save Save Cancel

Step 2: Fill in fields with basic patron data, and specify a **Homeroom** using the dropdown menu. Note **address** subtab for additional identifying info.

## Manage Patrons

- Update Patrons
- Import Patrons
- Export Patrons
- Manage Homerooms
- Upload Patron Pictures
- Library Policies
- Access Levels
- Calendar / Hours
- Site Configuration
- Inventory
- Job Manager

How do I... ?

General Address Picture

Save

Cancel

\* Required Field

## Patron Information

\* Last Name Middle Name \* District ID 

Gender Unspecified ▾

Birthdate Grad Year Grade Level First Name Nickname Email 1 Email 2 User Name New Password Confirm Password 

## Site Information

\* Barcode   Assign next barcode  
[Next: P 121051]

Patron Type Student ▾

Access Level Patron ▾

Status Active ▾

Card Expires 

Homeroom -- Select a Homeroom -- ▾

Other

User Defined 1 User Defined 2 User Defined 3 User Defined 4 User Defined 5 Acceptable Use Policy on File?  Yes Print Label on Save

Save

Cancel

Step 3: Fill in the **District ID** using your **school short name** and **student/staff barcode** number  
ex. ROPKS-346723 (see appendix for your school short name)

Manage Patrons

- Update Patrons
- Import Patrons
- Export Patrons
- Manage Homerooms
- Upload Patron Pictures
- Library Policies
- Access Levels
- Calendar / Hours
- Site Configuration
- Inventory
- Job Manager

How do I... ?

General Address Picture

Save Cancel

\* Required Field

Patron Information

\* Last Name   
Middle Name   
\* District ID   
Gender   
Birthdate   
Grad Year   
Grade Level

First Name   
Nickname   
Email 1   
Email 2   
User Name   
New Password   
Confirm Password

Site Information

\* Barcode   
 Assign next barcode [Next: P 121051]  
Patron Type   
Access Level   
Status   
Card Expires   
Homeroom

User Defined 1   
User Defined 2   
User Defined 3   
User Defined 4   
User Defined 5

Acceptable Use Policy on File?  Yes

Print Label on Save

Save Cancel

Step 4: Fill in the student/staff ID number for **Barcode**.

## Manage Patrons

- Update Patrons
- Import Patrons
- Export Patrons
- Manage Homerooms
- Upload Patron Pictures
- Library Policies
- Access Levels
- Calendar / Hours
- Site Configuration
- Inventory
- Job Manager

How do I... ?

General Address Picture

Save

Cancel

\* Required Field

## Patron Information

\* Last Name Middle Name \* District ID Gender Birthdate Grad Year Grade Level First Name Nickname Email 1 Email 2 User Name New Password Confirm Password 

## Site Information

\* Barcode  Assign next barcode  
(Next: P 121054)Patron Type Access Level Status Card Expires Homeroom 

Other

User Defined 1 User Defined 2 User Defined 3 User Defined 4 User Defined 5 Acceptable Use Policy on File?  Yes Print Label on Save

Save

Cancel

Step 5: Choose the appropriate **Patron Type** and **Access Level** using the drop down menus.

## Manage Patrons

[Update Patrons](#)[Import Patrons](#)[Export Patrons](#)[Manage Homerooms](#)[Upload Patron Pictures](#)[Library Policies](#)[Access Levels](#)[Calendar / Hours](#)[Site Configuration](#)[Inventory](#)[Job Manager](#)

How do I...

[General](#) [Address](#) [Picture](#)

Save

Cancel

\* Required Field

## Patron Information

\* Last Name Middle Name \* District ID Gender Birthdate Grad Year Grade Level First Name Nickname Email 1 Email 2 User Name New Password Confirm Password 

## Site Information

\* Barcode   Assign next barcode  
[Next: P 121051]Patron Type Access Level Status Card Expires Homeroom User Defined 1 User Defined 2 User Defined 3 User Defined 4 User Defined 5 Acceptable Use Policy on File?  Yes Print Label on Save

Save

Cancel

**Step 6: Click the **Save** button.**

# District Short Names

CLPKS- Cliffside Park  
DUMTS- Dumont  
ERUTS- East Rutherford  
ELPKS- Elmwood Park  
HASH- Hasbrouck Heights  
LEONS- Leonia  
MONTs- Montclair  
NBERS- North Bergen  
NVRSD- Northern Valley  
PKRDS- Park Ridge  
PATSD- Paterson  
ROPKS- Rochelle Park  
SABKS- Saddle Brook  
WEWDS- Westwood  
WRDGS- Wood-Ridge