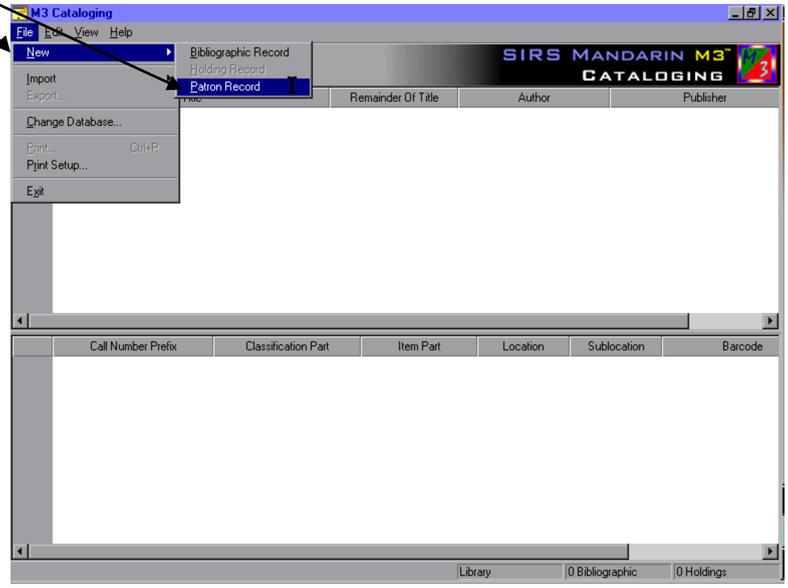
Creating a Template for a Patron Record

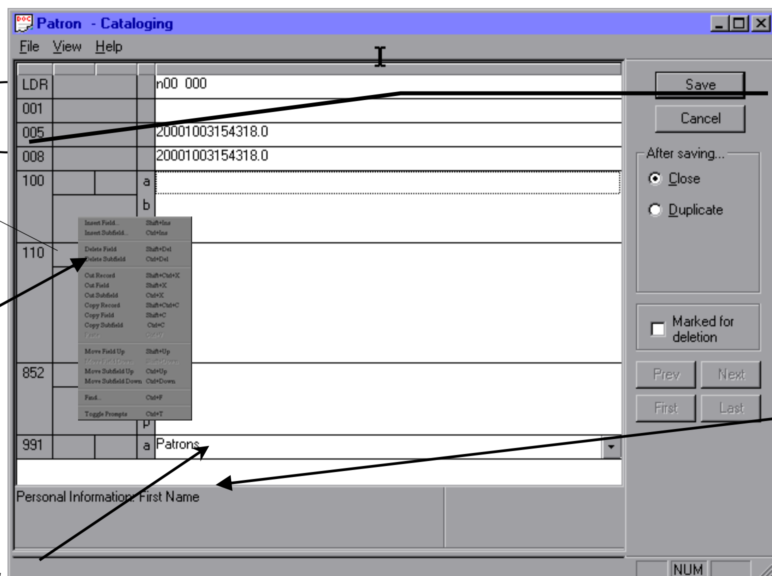
1. From the File Menu, choose New…Patron Record.



2. An empty patron record will appear. Type information that will appear in ALL or most of your records (The standard group, for example) in the appropriate fields in the WHITE section of the box. Leave the other fields blank.

You do not need to type anything into these fields. They are system-generated.

To insert or delete fields or subfields, right click in the gray area and select the action you wish to perform from the list.

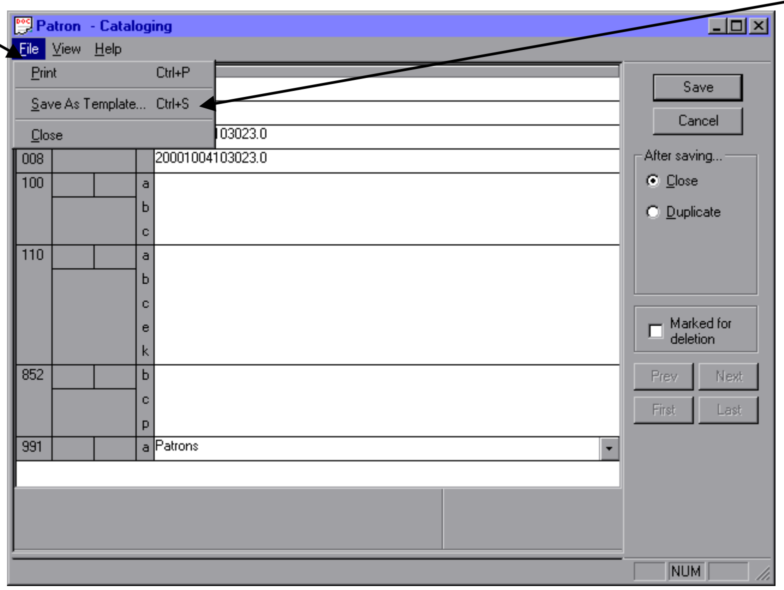


The fields use MARC field tag numbers. If you wish to use natural language prompts instead of the tag numbers, right click in the gray area and choose Toggle Prompts or click in the gray area and press Ctrl+T. You will always see prompts for each field in the bottom area of the window.

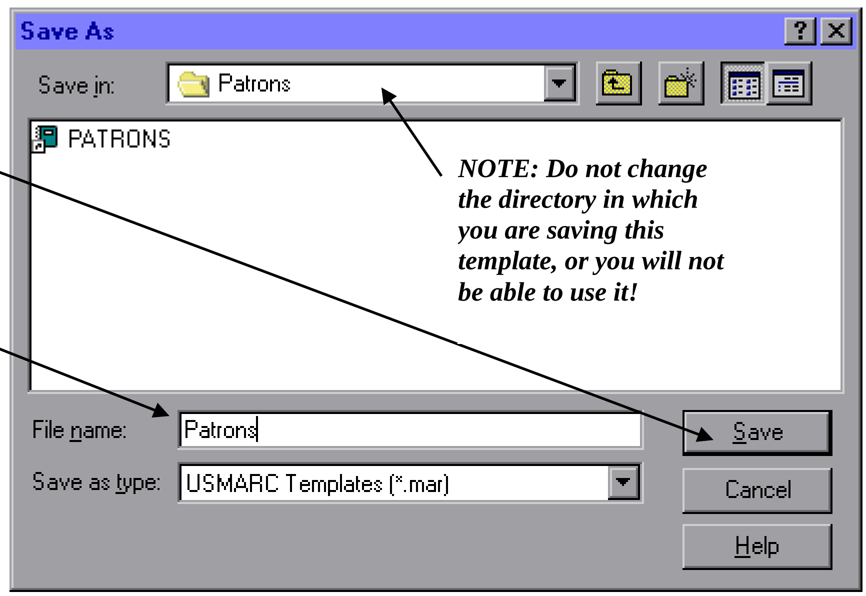
Be certain to select the proper group for this patron -for example, if you are entering a new staff member, make sure he/she is in the Staff or Faculty group!

S. Tanner

3. From the file menu of the RECORD ITSELF (not the application file menu), choose Save As Template



4. It will prompt you for a name for your template – type in a name that describes what that template is for (or you can overwrite the existing template in the folder). Click Save.



5. At this point you can either close the patron record that is still open, or use it to catalog an item. The template should be saved and ready for use.