Adding an Item From Within Circulation

1. From the Item Menu, choose Add Patron (or press F3).

2. A search dialog will appear so that you can search to be sure that patron is not already in your database. Type the last name of the patron in the box underneath Last Name.

3. If there are already patrons with the same last name in the database, they will appear in a search results list.

4. If no patrons match your search criteria, you will be taken directly to a blank record to enter the patron’s information.
5. Type the information in the appropriate fields in the WHITE section of the box. (You cannot type anywhere it appears gray.)

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.

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!

6. When you have finished filling in your information, click Save. (Note: You do not need to fill in all the fields if you do not wish to do so – first & last name & barcode are sufficient.)

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.