

The Connect Circ-Desk Cheat Sheet



Before creating a new account:

- Ask for I.D./proof of address and always search to see if patron already has an account, before asking patron to fill out registration form.
- In Connect, click on “new user.” Search for first name, last name and birthdate (MM/DD/YYYY). Click “register”.
 - If patron name is in database already, (yellow “possible matching account...” bar) verify it is the correct account by clicking the barcode and checking birth date, address, phone, etc. If their card is lost, follow instructions for **Issuing a replacement card (Lost card procedure)**.
 - If patron name is not in database, follow instructions for **Creating a new account:**

Creating a new account:

- Start filling out the registration form.
- **User ID:** barcode
- **Expiration date:** type in or use calendar (OWLS libraries expiration dates is 1 year. NFLS vary between 1 and 3 years – follow your library’s policy.)
- **Status:** leave as “Good” as long as all information has been verified.
- **Name:** Enter patron’s name in ALL CAPS – FIRST NAME, MIDDLE INITIAL (**no period**), LAST NAME, SUFFIX (if needed)

Examples: BRIAN M O'BRIEN JASON T MCDONALD HELEN A STALBINS PHIL W VAN DE HEI
Punctuation CAN be used for compound names. Hyphens ARE OKAY for multiple last names.

Example: KATHRYN M SMITH-JOHNSON

- **Birth date:** mm/dd/yyyy – verify it carried over from patron account search
- **Alternate ID:** NOT TO BE USED FOR SECOND NAMES/NICKNAMES. This field serves no purpose. If you need a second name, use the Full Legal Name field.
- **User Card Type:** choose the patron type, Adult, Juvenile, etc....
- **Address:** Enter patron’s street address in ALL CAPS, no punctuation and using standard postal abbreviations. Use the # symbol to indicate apartment or lot number. If PO Box is same city as permanent address, add it after permanent address, in same field. If not, then add a secondary address field by checking the “secondary address” box.

Examples:

1049 4TH AVE	APPLE ST #1D	W425 STATE HWY 42
MENASHA WI 54952	NEENAH WI 54956	PO BOX 29
		ALGOMA WI 54911-0029

Some common standard postal abbreviations:

AVE avenue	PL place	ST street	CT court
PO BOX (number)	BLVD boulevard	TER terrace	CTY RD (letter)
RD road	CIR circle	TRL trail	STATE HWY (number)
PKWY parkway	DR drive	HTS heights	LN lane

- **Telephone:** Enter patron’s telephone number with area code, separated by hyphens. Use a (space) E after the telephone number to indicate that the patron is receiving notices via email, if this is local policy.

Example: 920-123-1234 E

- **Email:** If patron has requested notices via email, enter the email address using lower case. If no email address, leave blank.
- **For a juvenile card:** Select **Sponsor** from the Preferred Address dropdown. Enter the parent's name in the **Sponsor** field with **JUST** the name. Add address information even if it is the same as the patron. *If additional information is needed for parent or guardian, add it to a note.
Example: ALLEN M VANDENHEUVAL
- **Preferred Branch:** Default will be the branch you are logged in as. This should match the Home Agency, where the patron registered.
- **Preferred Address:** Where patron wants to receive their mailed notices.
- **Overnight Email Sending:** If an email address was added, choose from the dropdown if patron would like to receive emailed notices. Assure patrons their email address will only be used for library business. *bounced is an automatic setting placed by the system.
- **Email Receipts:** Choose Yes if patron would like to receive emailed receipts for checkouts, etc...
- **Home Agency:** Should fill in automatically. If not, make it the same as Preferred Branch and registration branch.
- **Municipality:** Look up on the Municipality Codes by County or Municipality Codes by Municipality lists. If unsure about the exactly municipality, check the county plat map or online resources.
- **School:** Only to be used if you are locally keeping track of local school's patron use.
- **County:** Choose the appropriate county that matches the municipality.
- **Save the record:** Click on the save information icon in the bottom left-hand corner.

Issuing a replacement card (Lost card procedure)

- Pull up patron's account by searching for patron's name.
- Scan the new barcode into the USER ID field.
- Under the Library Statistics > REPLACE CARD field, add in the following "#1 MK/OWLS 9/15/22." Update the "#" of cards each time they get a new one. After the first replacement, please charge \$3 to the account.
- **Don't forget to update expiration date when issuing a replacement card.**
- Click on the green save information icon in the bottom right-hand corner.

Editing the patron record

- Pull up patron's account by scanning their barcode or searching their name.
- Edit any field you need to. Choose from drop-down menus, free text, or calendars.
- Click on the green save information icon in the bottom right-hand corner when done.

Deleting and Resetting PIN number

- Scan patron's barcode or search by name and birthdate.
- Scroll down to the "reset PIN" button in bottom left-hand corner and click.
- This will reset the PIN to the default of the patron's birthdate, MMDDYY. Patrons can then log in and update their PIN to whatever they'd like.
- Click on the green save information icon in the bottom right-hand corner when done.

(More details can be found at <https://owlsnet.org/owlsnet/carl-training>)