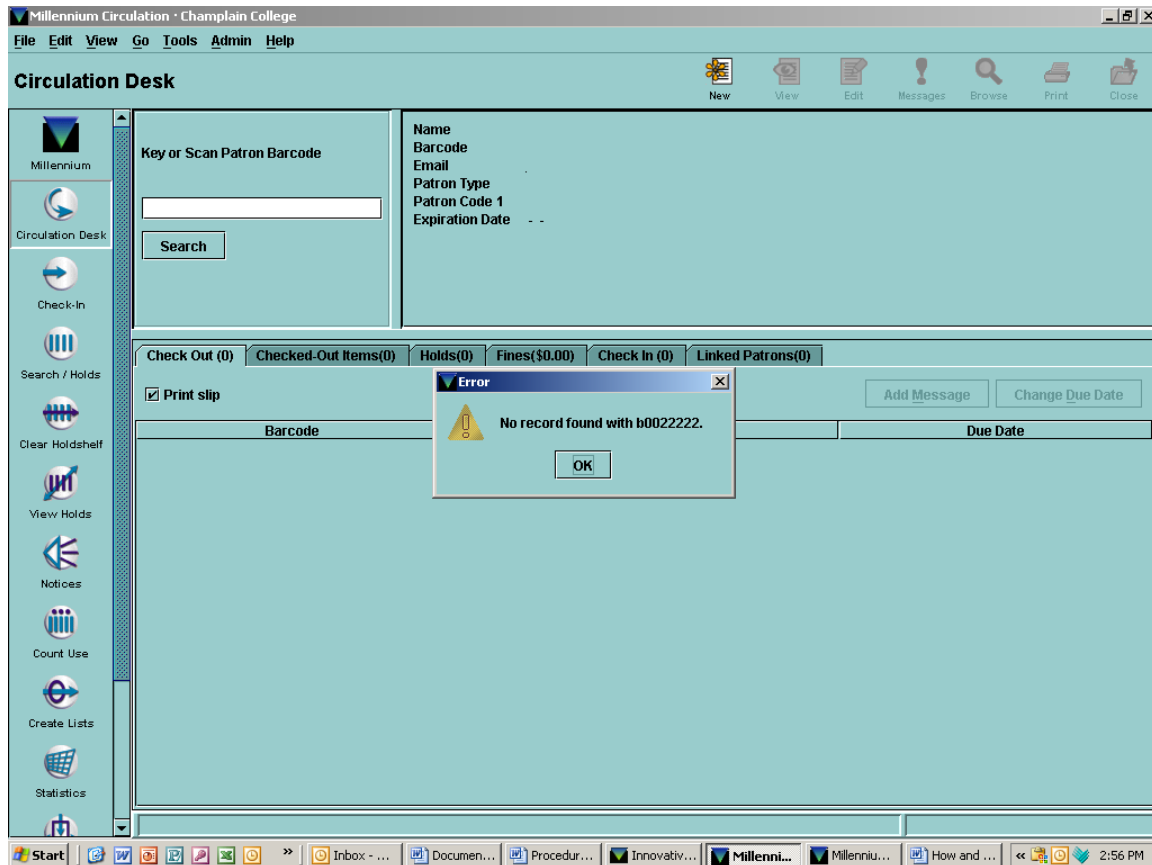
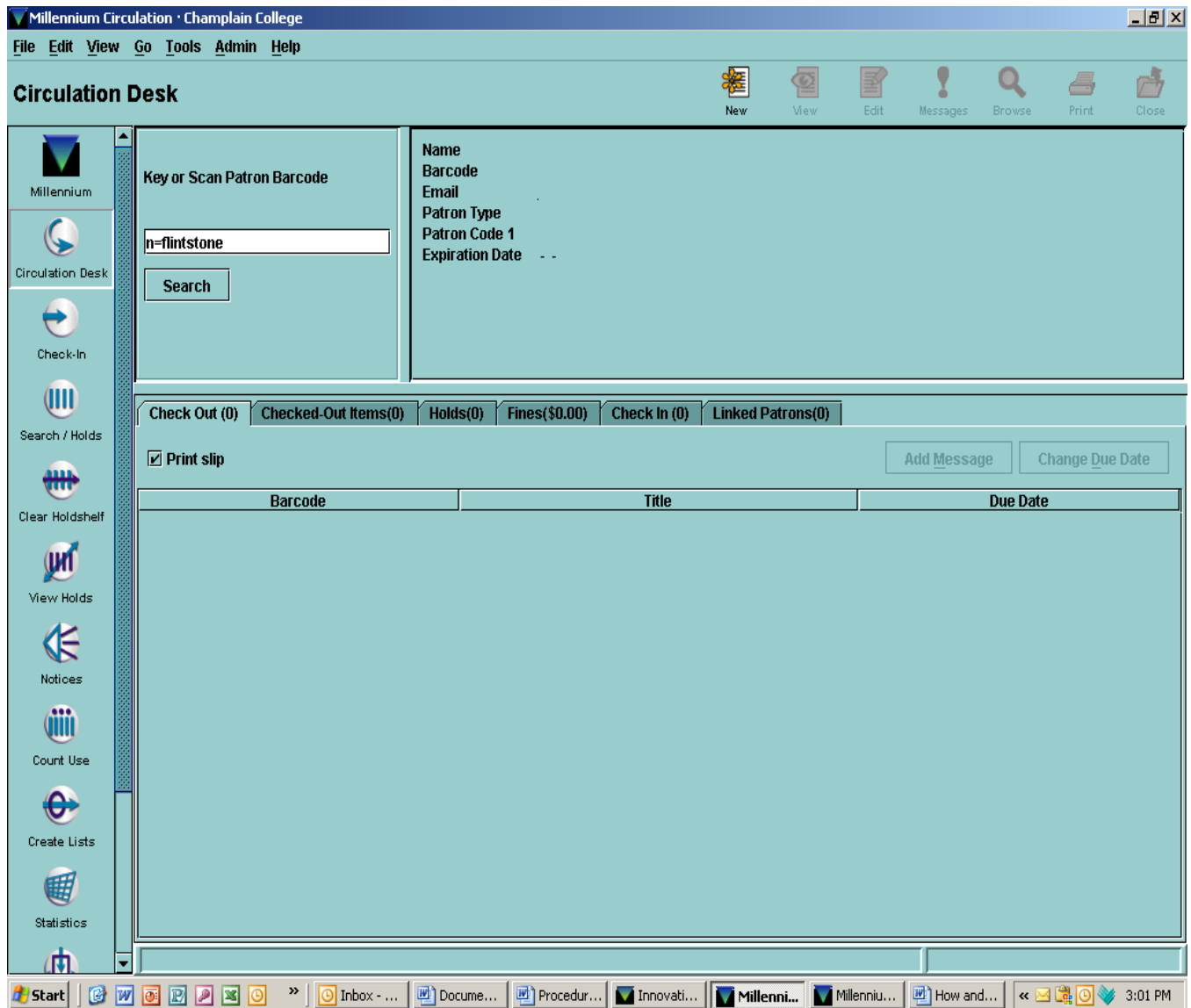


## How & When to Create and Add a New Account (Circulation Coordinators & Library Aide II Only)

If you scan a patron's card and the following information appears on the screen. The person may not be in our system. To make sure, you want to type in the person's name, see pg 2.



You can type the person's name into the system to verify that the person is not in the system.



## Appendix A

The following screen should appear.

Millennium Circulation - Champlain College

File Edit View Go Tools Admin Help

**Circulation Desk**

Key or Scan Patron Barcode

n=flintstone

Search

Name  
Barcode  
Email  
Patron Type  
Patron Code 1  
Expiration Date

Index: . RECORD NO

#	NAME	# ENTRIES
21	Fitzgerald Emily Jeanne	1
22	Fitzgerald Michael P	1
23	Fitzpatrick Ryan J	1
24	Flagler Barton P	1
25	Flanagan Edward	1
26	Flanagan Scott D	1
27	Flanagan Ted	1
28	Flanagan Tom	1
29	Fleming Dylan M	1
30	Flinn Chris	1
31	Your entry =flintstone would be here	0
32	Floyd Kaylie E	1
33	Flynn Keegan Ruel	1
34	Flynn Kelly Ann	1
35	Flynn Richard	1
36	Fodge Mary Corynn	1
37	Fogg Brenden R	1
38	Foley Jared A	1
39	Foley Kaleigh Elizabeth	1
40	Foley Kerstin	1
41	Foley Shauna A	1
42	Follett Ben	1
43	Folsom Erica I	1

NOT LIMITED

0 NAMES, 0 ENTRIES

At this point, if the person wants to check out a book and he or she is not in the system, the person should be verified by the Circulation Coordinator or Library Aide II. Make sure they show you their **current schedule** online through the **Champlain portal**.

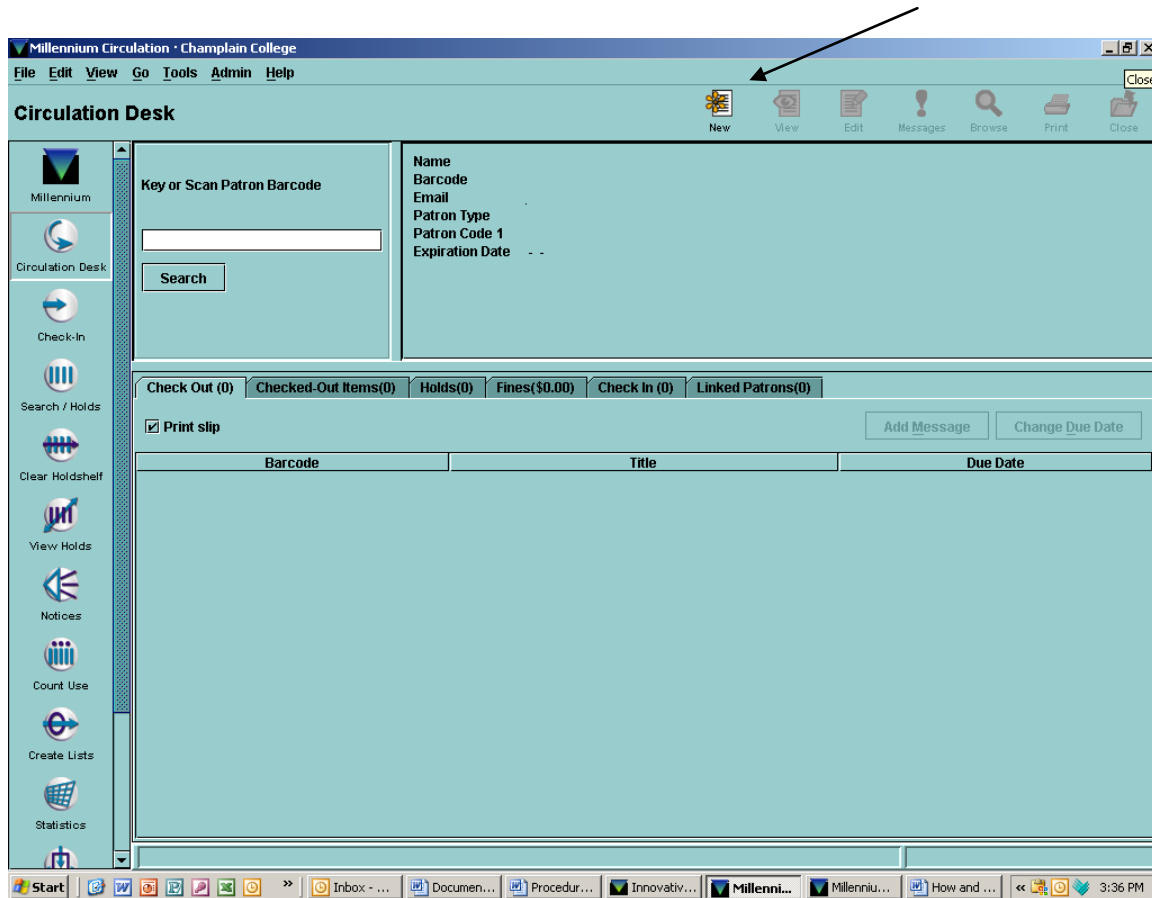
Please do not add a patron or update a record unless you are asked to do so by the Circulation Coordinator.

If the patron is a student who wants to check out a **reserve item**, but is not in the system using all the methods above. See how to add a patron on pg 4.

## Appendix A

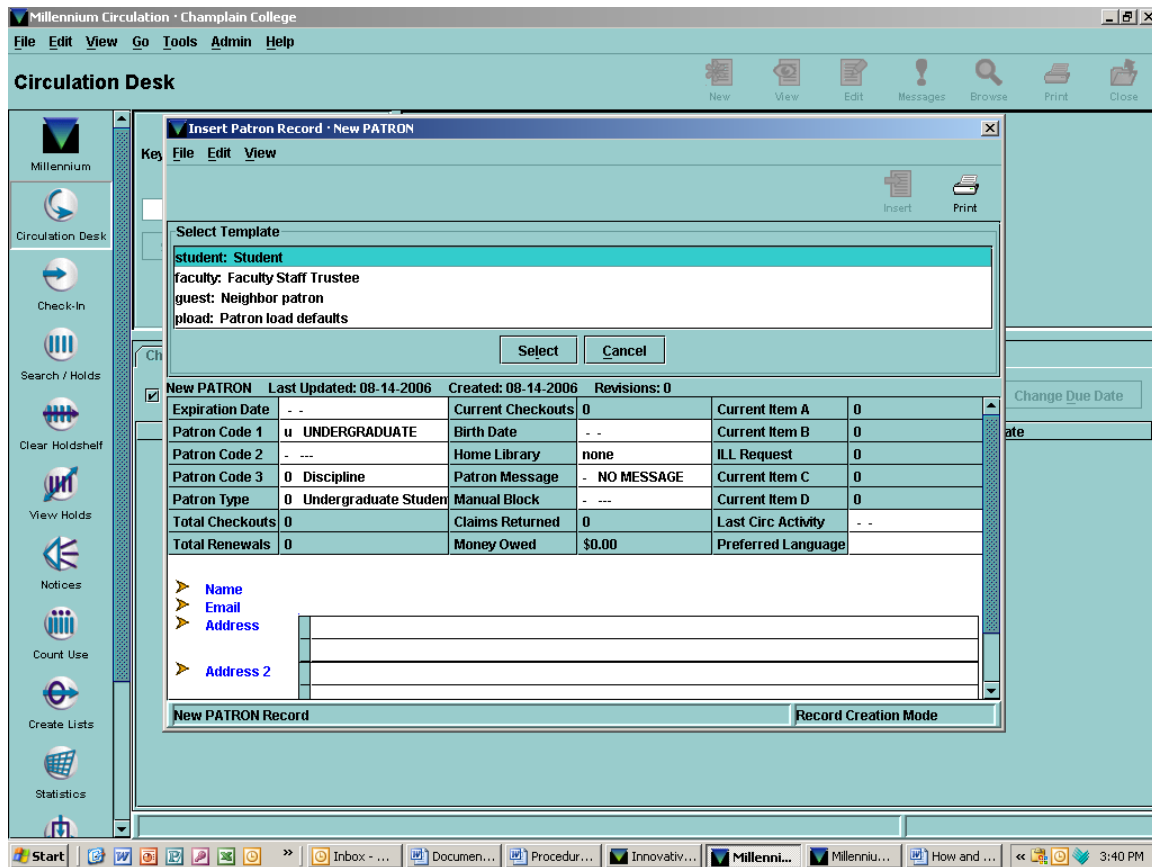
How to add a patron:

Click on the icon “New” to create a new account



## Appendix A

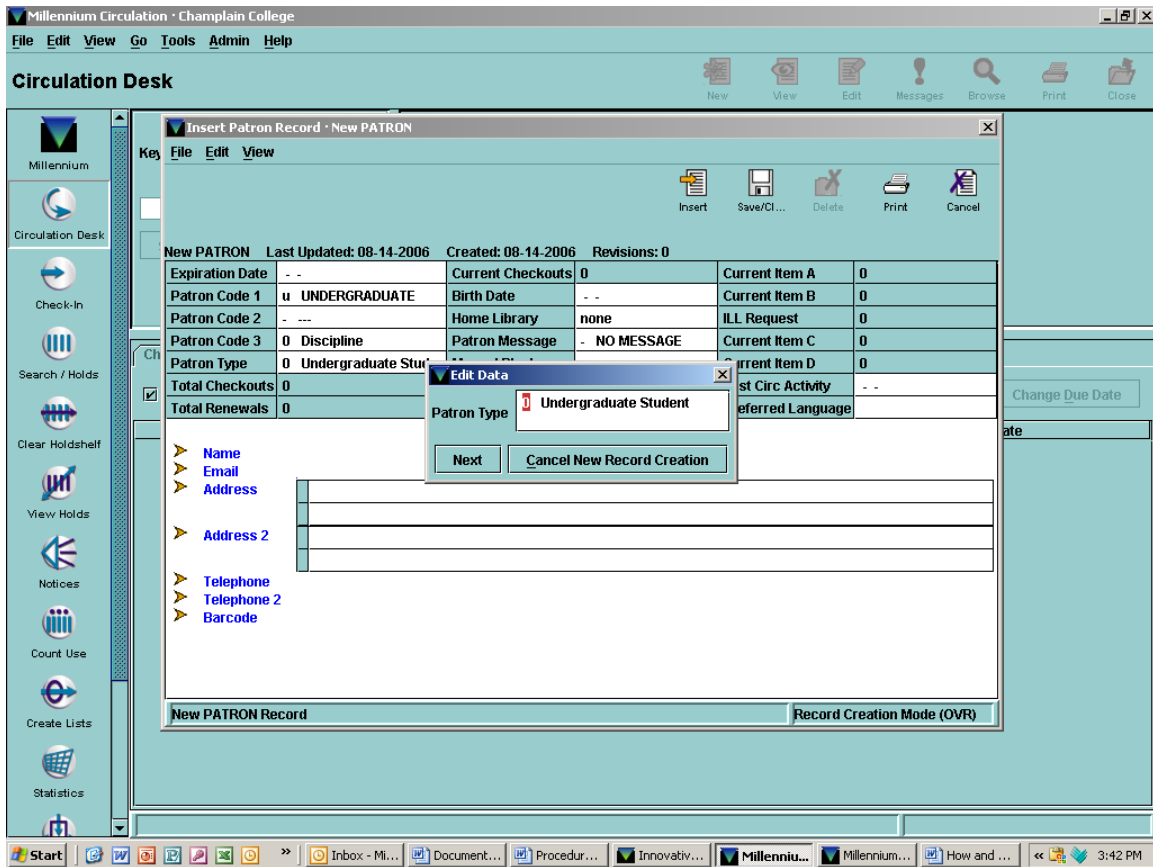
The following screen will appear:



Click on the "Select" button to choose the Student Template

## Appendix A

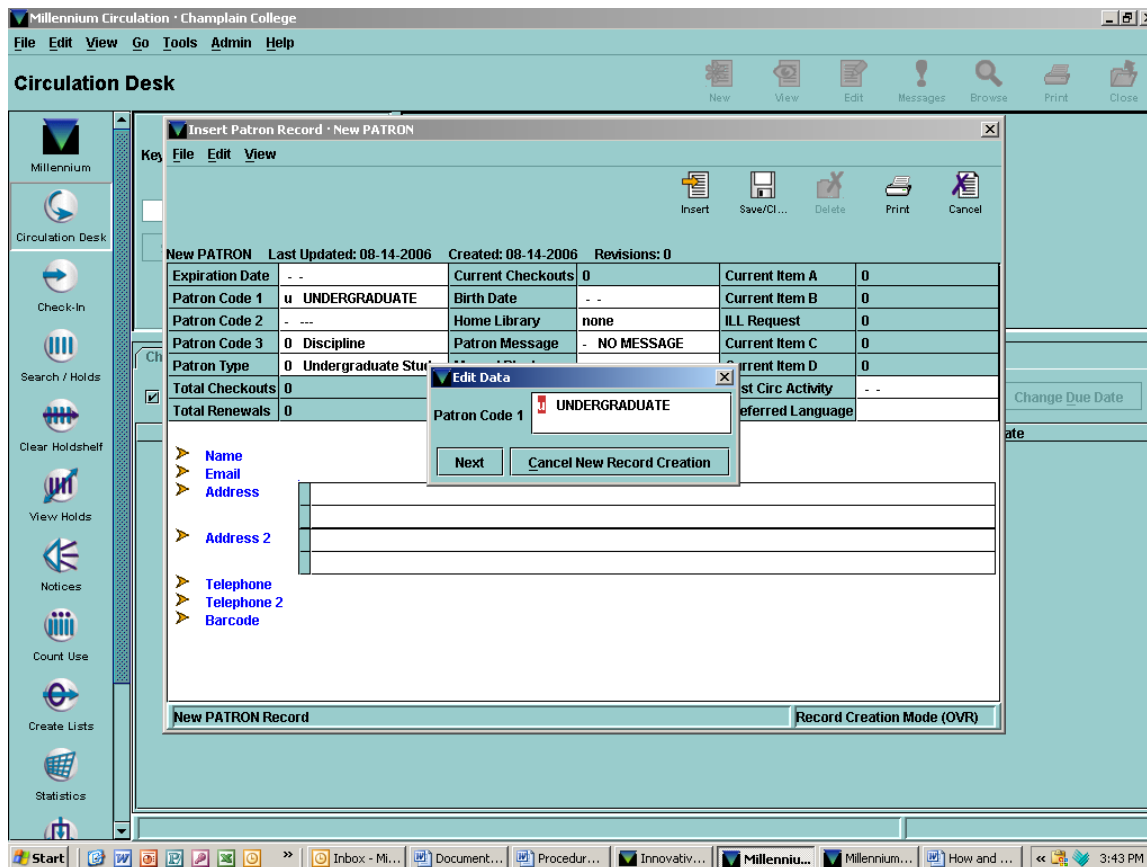
The following screen will appear:



Click on the "Next" button to choose the Undergraduate Student.

## Appendix A

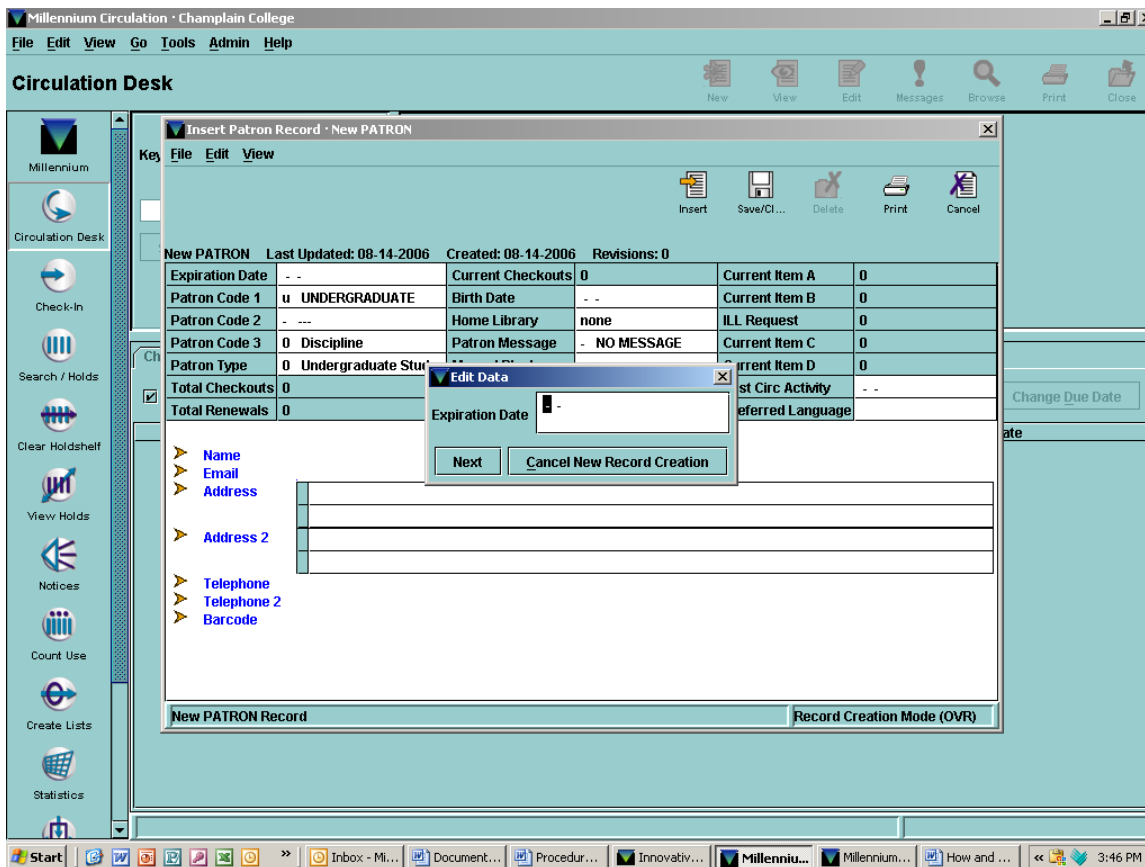
The following screen will appear:



Click on the “Next” button to choose the Undergraduate.

## Appendix A

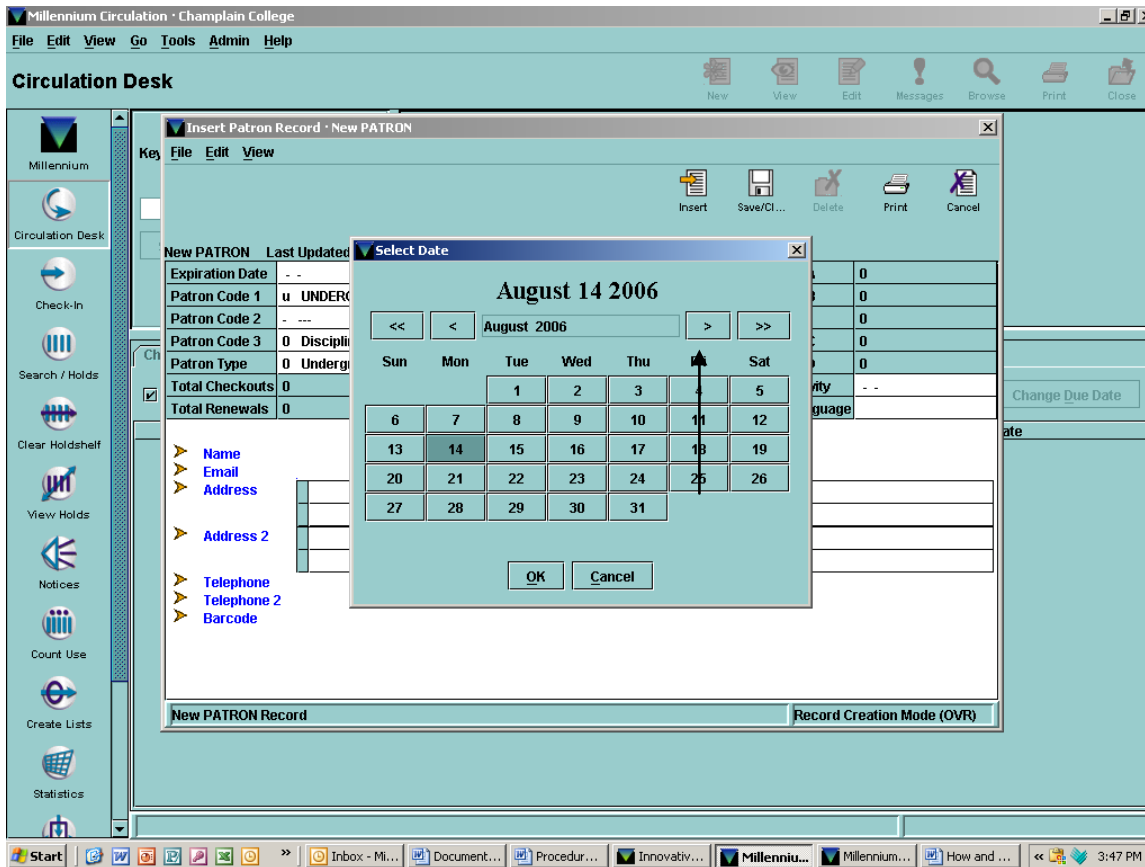
The following screen will appear:



Double click next inside the white box in the “Expiration Date” field to bring up a calendar.

## Appendix A

The following screen will appear:

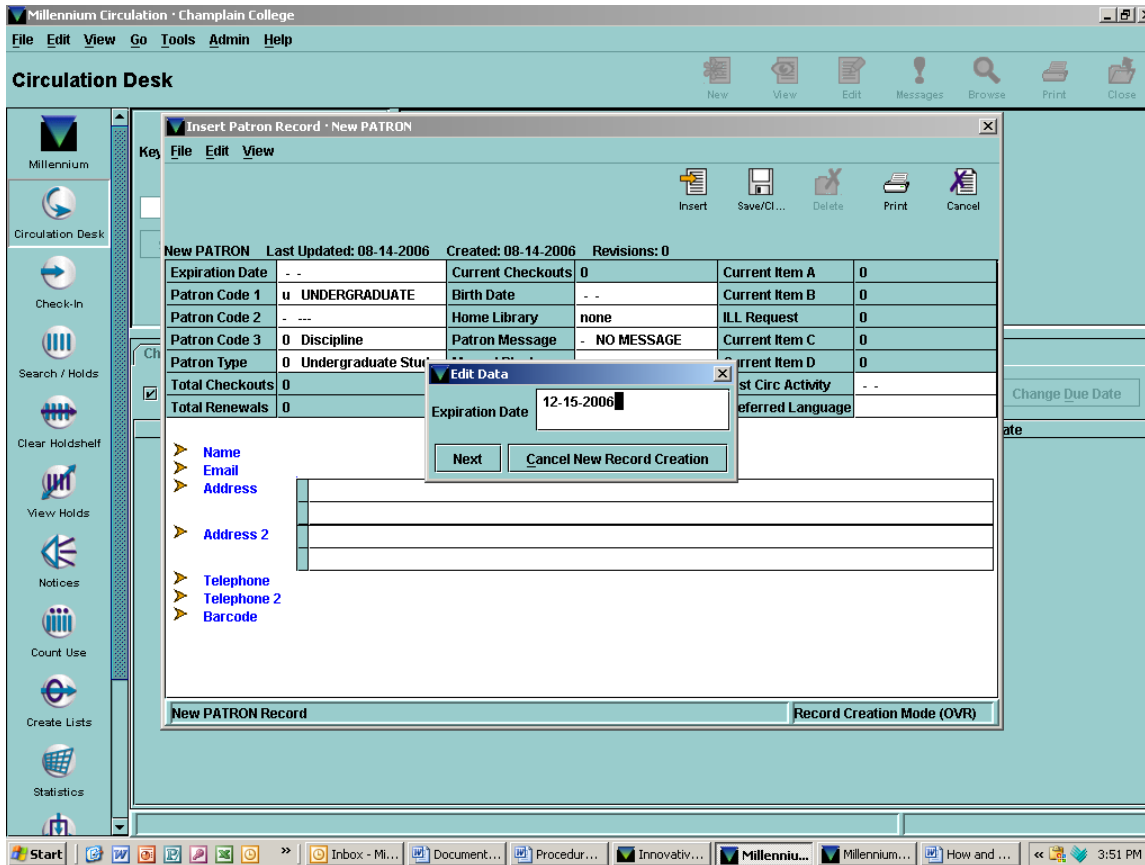


Click on the single > sign to the right to change the date. The date should be changed to the last day of classes for each semester. This will be the last day of exam week.

Next, choose the date.

## Appendix A

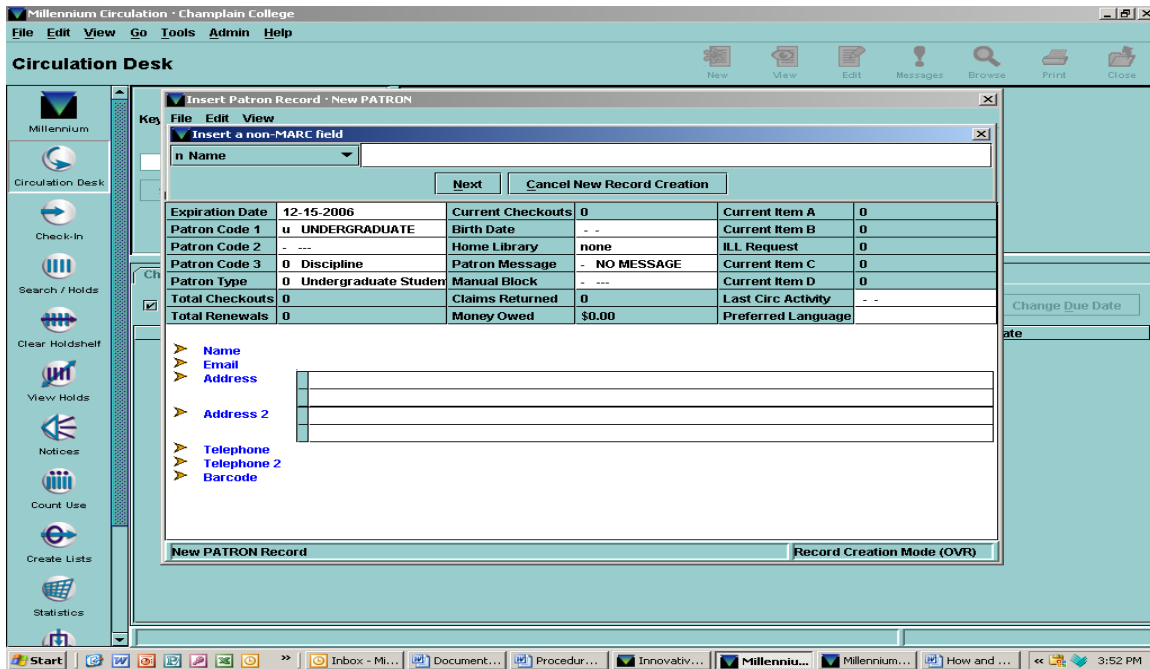
The following screen will appear:



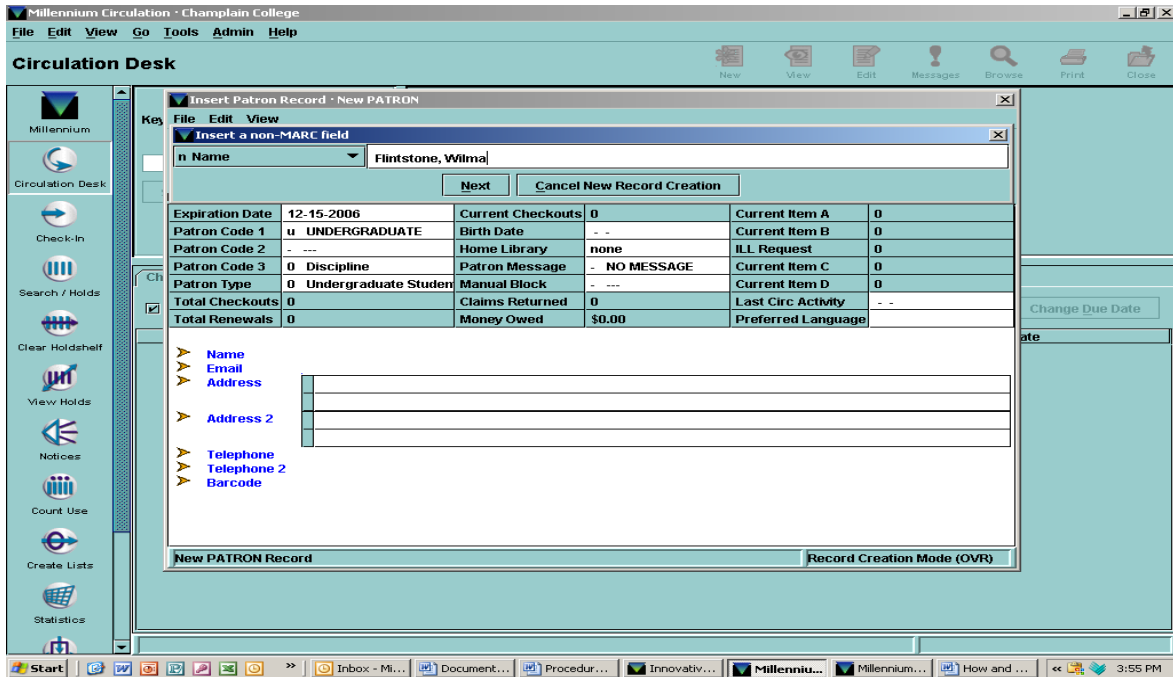
Click on the "Next" button to choose the Expiration Date.

## Appendix A

The following screen will appear:



Type in the person's name. Very Important – type the last name, first name.



Click the "Next" button

## Appendix A

The following screen will appear:

The screenshot shows the Millennium Circulation software interface. The main window is titled "Circulation Desk" and contains a form for "Insert Patron Record - New PATRON". The form is divided into several sections:

- z Email:** A dropdown menu set to "z Email" and an empty text input field.
- Buttons:** "Next" and "Cancel New Record Creation".
- Table:** A table with columns for various patron attributes and their values.
- Form Fields:** Fields for Name, Email, Address, Address 2, Telephone, Telephone 2, and Barcode.
- Status:** "New PATRON Record" and "Record Creation Mode (INS)".

Expiration Date	12-15-2006	Current Checkouts	0	Current Item A	0
Patron Code 1	u UNDERGRADUATE	Birth Date	- -	Current Item B	0
Patron Code 2	- ---	Home Library	none	ILL Request	0
Patron Code 3	0 Discipline	Patron Message	- NO MESSAGE	Current Item C	0
Patron Type	0 Undergraduate Studen	Manual Block	- ---	Current Item D	0
Total Checkouts	0	Claims Returned	0	Last Circ Activity	- -
Total Renewals	0	Money Owed	\$0.00	Preferred Language	

Name: Flintstone, Wilma  
Email: [Empty]  
Address: [Empty]  
Address 2: [Empty]  
Telephone: [Empty]  
Telephone 2: [Empty]  
Barcode: [Empty]

Do the same thing for the **email** and **address**.

Do not fill out any information for the second address line, just click on the "Next" button.

Fill in the phone number using any form, example: 802-555-5555 or (802) 555-5555.

Do not fill in any information for the second telephone number, unless you think it's necessary.

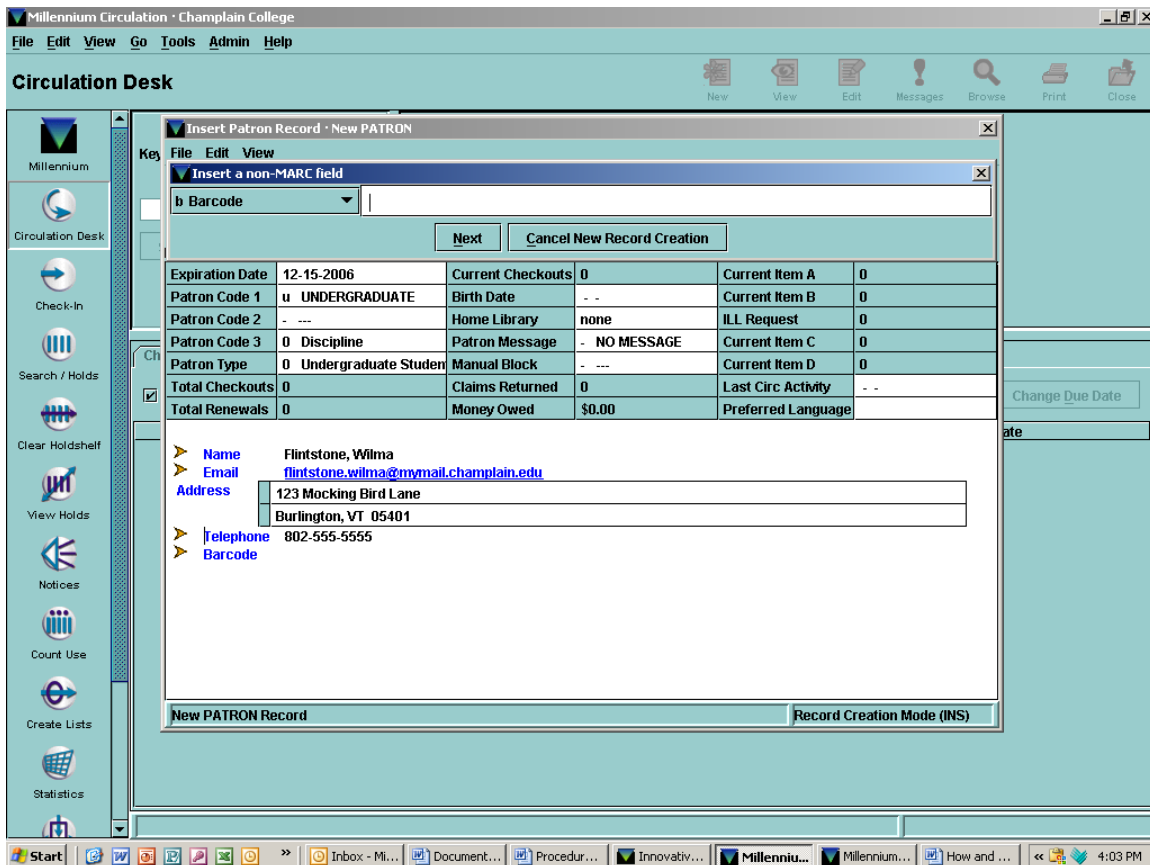
Click the "Next" button.

If you make a mistake at any point, you can either cancel & start over, or wait until you have swiped the barcode to edit the record.

The next screen will be the barcode screen, see page 13.

## Appendix A

This is where you would swipe the student's card. I used an old 13 digit barcode number for this example. The new numbers are only 7 digits.



Once you swiped the card the system will automatically go to the next screen.

See next page.

## Appendix A

### The following screen will appear:

At this point you are done with the new account. You can edit information at this point, or after saving & closing the account through the “edit” icon.

If all the information is correct, click on the “Save/Cl...: icon.

The screenshot displays the Millennium Circulation software interface. The main window is titled "Insert Patron Record - New PATRON". It features a menu bar with "File", "Edit", and "View". Below the menu bar is a toolbar with icons for "New", "View", "Edit", "Messages", "Browse", "Print", and "Close". A secondary toolbar within the window contains icons for "Insert", "Save/Cl...", "Delete", "Print", and "Cancel". An arrow points to the "Save/Cl..." icon.

The main content area shows a table of patron information:

New PATRON		Last Updated: 08-14-2006	Created: 08-14-2006	Revisions: 0	
Expiration Date	12-15-2006	Current Checkouts	0	Current Item A	0
Patron Code 1	u UNDERGRADUATE	Birth Date	- -	Current Item B	0
Patron Code 2	- ---	Home Library	none	ILL Request	0
Patron Code 3	0 Discipline	Patron Message	- NO MESSAGE	Current Item C	0
Patron Type	0 Undergraduate Student	Manual Block	- ---	Current Item D	0
Total Checkouts	0	Claims Returned	0	Last Circ Activity	- -
Total Renewals	0	Money Owed	\$0.00	Preferred Language	

Below the table, the patron's details are listed:

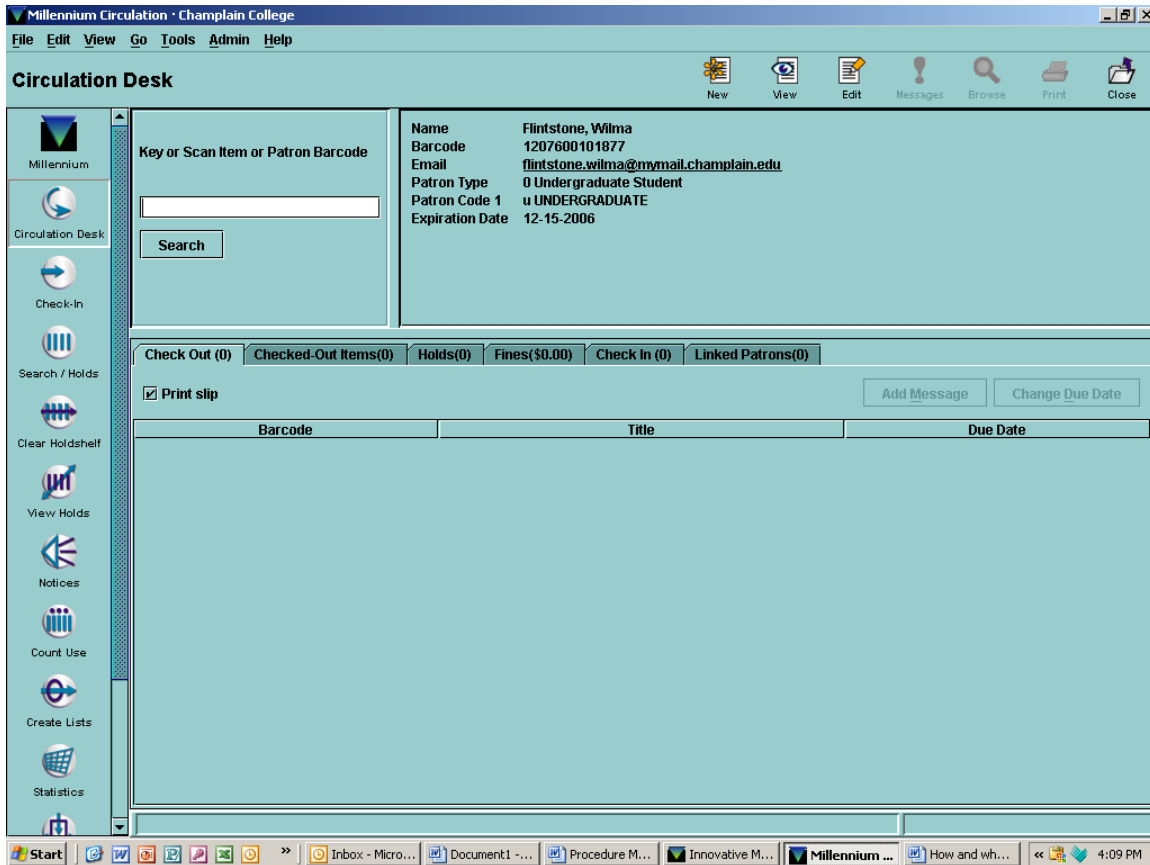
- Name: Flintstone, Wilma
- Email: [flintstone.wilma@mymail.champlain.edu](mailto:flintstone.wilma@mymail.champlain.edu)
- Address: 123 Mocking Bird Lane, Burlington, VT 05401
- Telephone: 802-555-5555
- Barcode: 1207600101877

The status bar at the bottom of the window indicates "New PATRON Record" and "Record Creation Mode (INS)".

See the next page for the finished account.

## Appendix A

The following screen will appear:



You can check out the reserve item to the student at this point. The student should not have a problem next time.

## Appendix A

## How to remove a message from a patron's account (Circulation Coordinators & Library Aide II Only)

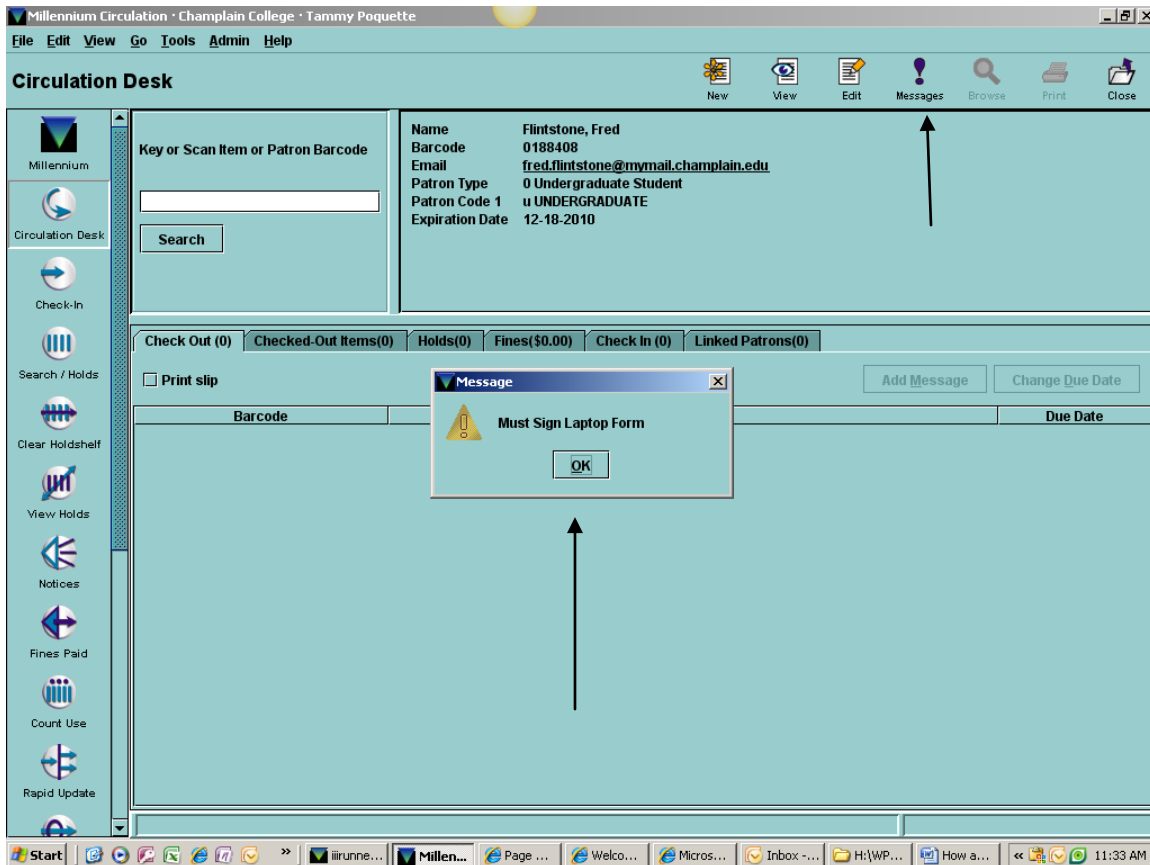
### Removing a message:

You would normally remove a message when a student fills out the “**Laptop Agreement Form**” located at the front desk.

Use the ID number for the student's laptop form or the person's name to bring up the account.

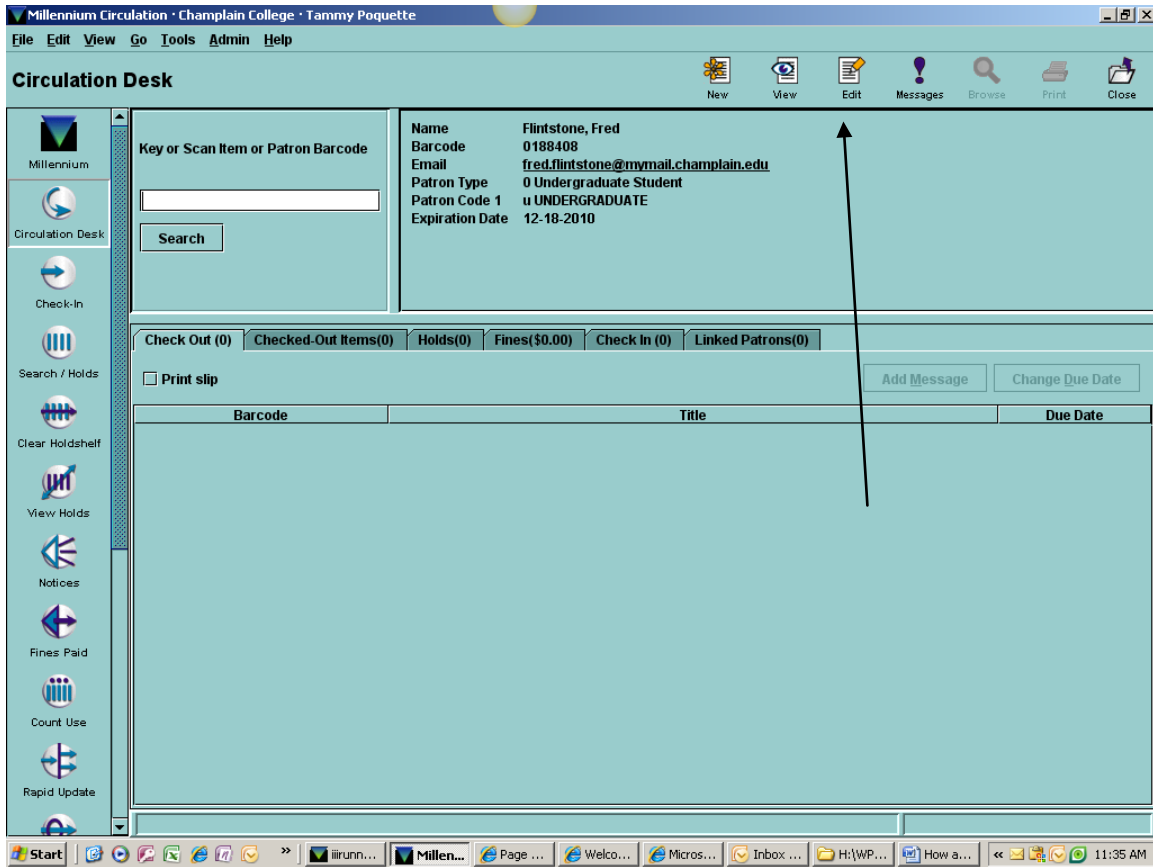
You should see the message “**Must Sign Laptop Form.**” You will also notice the “Messages” icon has a purple exclamation point.

Click on the “**OK.**”



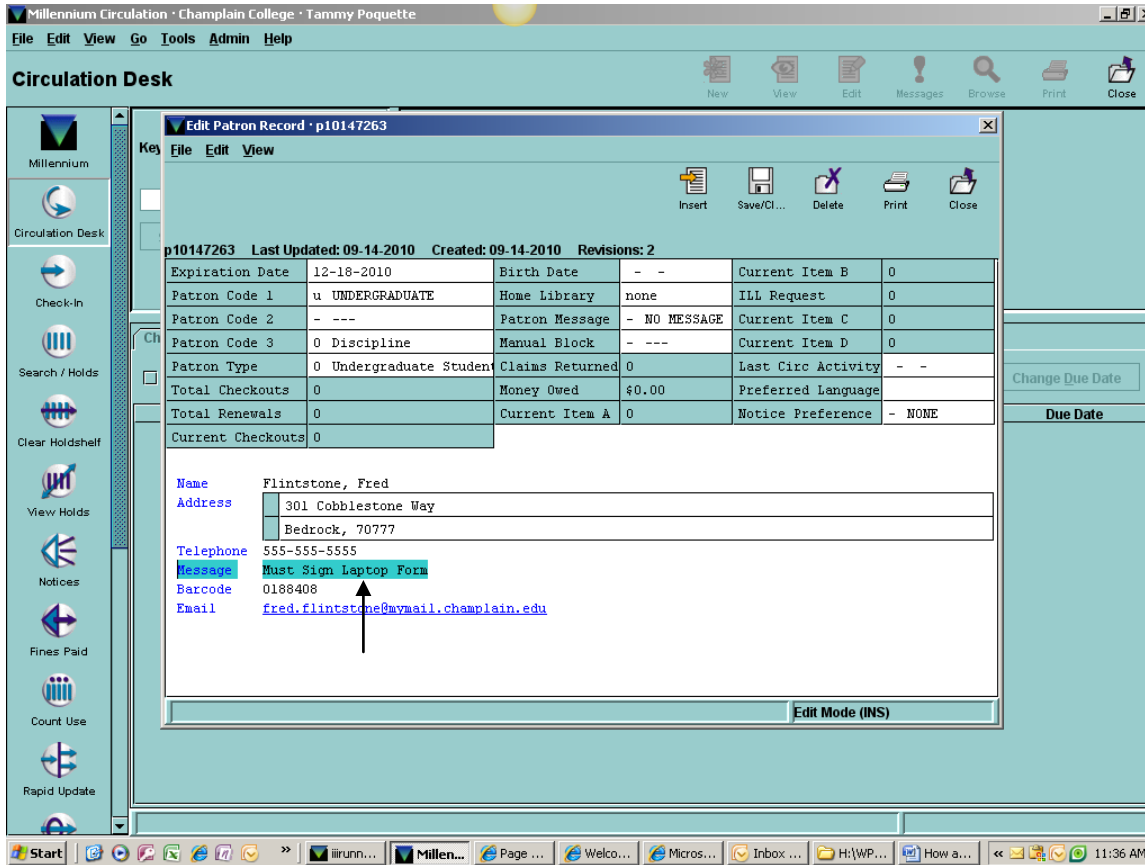
## Appendix A

Click on the “Edit” icon to gain entry into the person’s information.



Appendix A

This will bring up the screen to delete the message. **Highlight** the information and click the **“delete”** button on the keyboard.



Appendix A

This will erase the message. Click on the “Save/Cl...” button.

Millennium Circulation · Champlain College · Tammy Poquette

File Edit View Go Tools Admin Help

**Circulation Desk**

Key File Edit View

Insert Save/Cl... Delete Print Close

p10147263 Last Updated: 09-14-2010 Created: 09-14-2010 Revisions: 2

Expiration Date	12-18-2010	Birth Date	- -	Current Item B	0
Patron Code 1	u UNDERGRADUATE	Home Library	none	ILL Request	0
Patron Code 2	- ---	Patron Message	- NO MESSAGE	Current Item C	0
Patron Code 3	0 Discipline	Manual Block	- ---	Current Item D	0
Patron Type	0 Undergraduate Student	Cleims Returned	0	Last Circ Activity	- -
Total Checkouts	0	Money Owed	\$0.00	Preferred Language	
Total Renewals	0	Current Item A	0	Notice Preference	- NONE
Current Checkouts	0				

Name Flintstone, Fred  
 Address 301 Cobblestone Way  
 Bedrock, 70777  
 Telephone 555-555-5555  
 Barcode 0188408  
 Email [fred.flintstone@vymail.champlain.edu](mailto:fred.flintstone@vymail.champlain.edu)

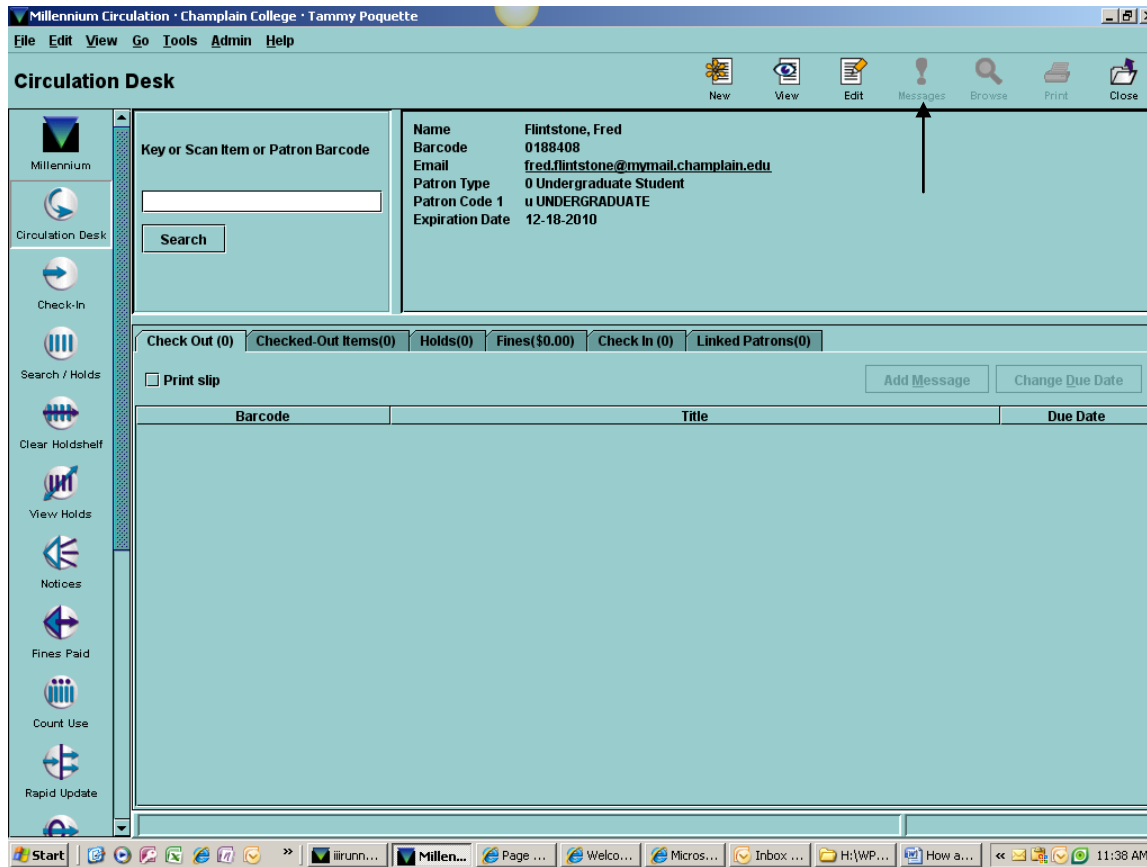
Change Due Date  
 Due Date

Edit Mode (INS)

Start | Millennium Circulation | Page ... | Welco ... | Micros ... | Inbox ... | H:\WP ... | How a ... | 11:37 AM

## Appendix A

You will notice that the “**Messages**” icon no longer has the purple exclamation point showing. **The message has been removed.**



## Appendix A

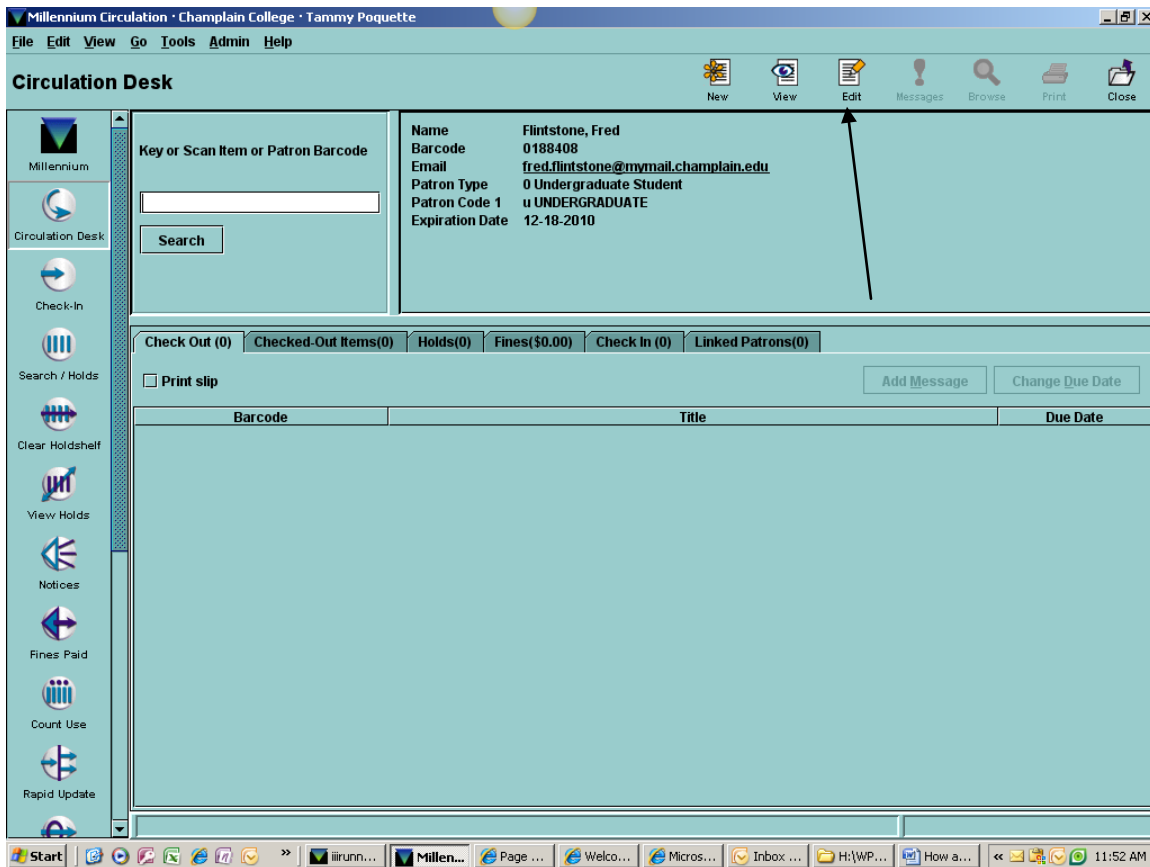
## How to add a message to a patron's account (Circulation Coordinators & Library Aide II Only)

### Adding a message:

The major reason to add a message is when a **student has forgotten his or her Champlain College ID and needs to use a driver's license.**

Using the information from the driver's license, you would type in the student's name using the "n" or "n=" (**Again only Library Aide II or Circulation Coordinators can do this**).

Click on the **"Edit"** icon to gain entry into the person's information.



## Appendix A

Click on the “Insert” tab to bring up a drop down.

The screenshot shows the Millennium Circulation software interface. The main window is titled "Edit Patron Record - p10147263". The interface includes a menu bar (File, Edit, View), a toolbar with icons for New, View, Edit, Messages, Browse, Print, and Close, and a sidebar with various functions like Check-In, Search / Holds, Clear Holdshelf, View Holds, Notices, Fines Paid, Count Use, and Rapid Update.

The main content area displays a table of patron information and a text area with contact details. An arrow points to the "Insert" menu option in the toolbar.

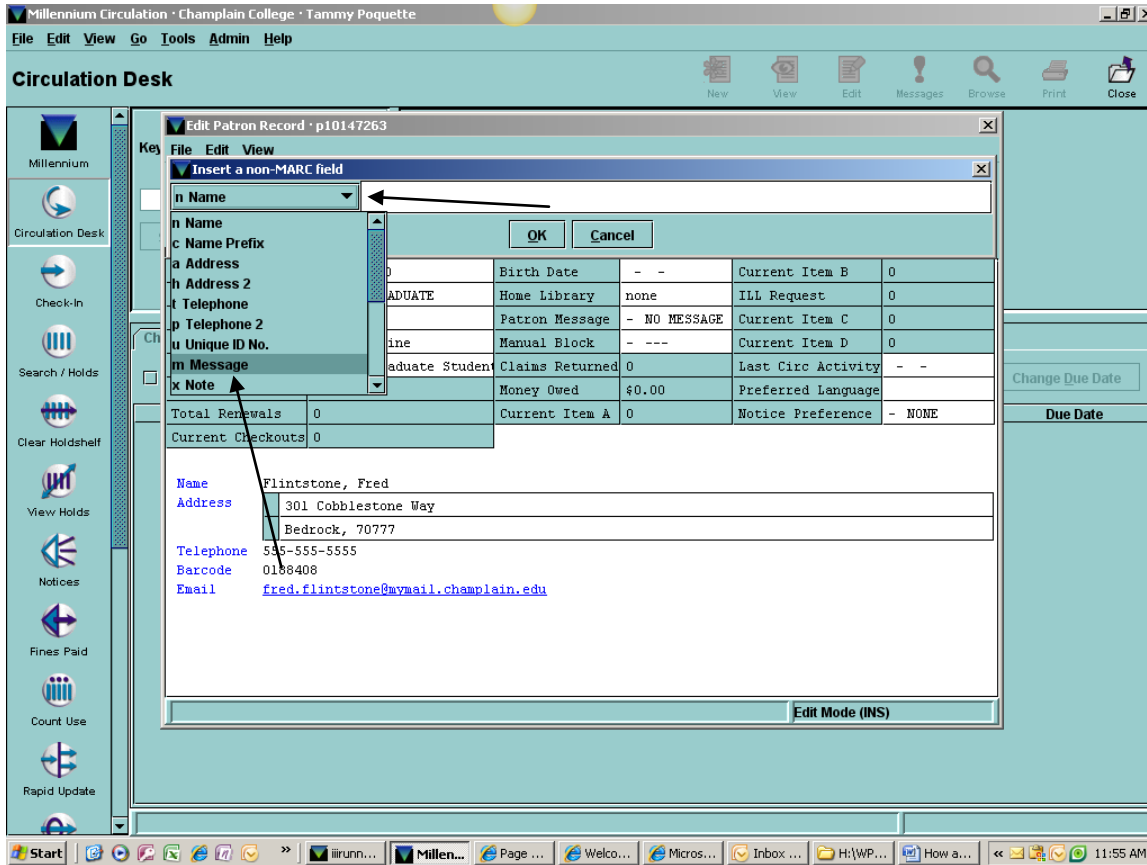
p10147263 Last Updated: 09-14-2010 Created: 09-14-2010 Revisions: 2					
Expiration Date	12-18-2010	Birth Date	- -	Current Item B	0
Patron Code 1	u UNDERGRADUATE	Home Library	none	ILL Request	0
Patron Code 2	- ---	Patron Message	- NO MESSAGE	Current Item C	0
Patron Code 3	0 Discipline	Manual Block	- ---	Current Item D	0
Patron Type	0 Undergraduate Student	Cleims Returned	0	Last Circ Activity	- -
Total Checkouts	0	Money Owed	\$0.00	Preferred Language	
Total Renewals	0	Current Item A	0	Notice Preference	- NONE
Current Checkouts	0				

**Name** Flintstone, Fred  
**Address** 301 Cobblestone Way  
 Bedrock, 70777  
**Telephone** 555-555-5555  
**Barcode** 0188408  
**Email** [fred.flintstone@ymail.champlain.edu](mailto:fred.flintstone@ymail.champlain.edu)

At the bottom of the window, it says "Edit Mode (INS)".

Appendix A

Click on the **arrow** next to the **“n Name”** to bring up the list of items to choose. Click on the **“m Message.”**



## Appendix A

Press the key **"F5"** to bring up the message **"Student must have CC ID, already used driver's license."**

Click **"OK."**

The screenshot shows the Millennium Circulation software interface. The main window is titled "Edit Patron Record · p10147263". A dialog box titled "Insert a non-MARC field" is open, showing a message field with the text "Student must have CC ID, already used driver's license". Below the message field are "OK" and "Cancel" buttons. An arrow points from the "OK" button to the "Student must have CC ID, already used driver's license" message. The background shows a table of patron information and a form with fields for Name, Address, Telephone, Barcode, and Email.

Expiration Date	12-18-2010	Birth Date	- -	Current Item B	0
Patron Code 1	u UNDERGRADUATE	Home Library	none	ILL Request	0
Patron Code 2	- ---	Patron Message	- NO MESSAGE	Current Item C	0
Patron Code 3	0 Discipline	Manual Block	- ---	Current Item D	0
Patron Type	0 Undergraduate Student	Claims Returned	0	Last Circ Activity	- -
Total Checkouts	0	Money Owed	\$0.00	Preferred Language	
Total Renewals	0	Current Item A	0	Notice Preference	- NONE
Current Checkouts	0				

Name: Flintstone, Fred  
Address: 301 Cobblestone Way, Bedrock, 70777  
Telephone: 555-555-5555  
Barcode: 0188408  
Email: [fred.flintstone@vymail.champlain.edu](mailto:fred.flintstone@vymail.champlain.edu)

Appendix A

You can see the message on the person's account.

Click on the icon "Save/CI" to save and close the screen.

The screenshot displays the Millennium Circulation software interface. The main window is titled "Edit Patron Record - p10147263". It features a menu bar with "File", "Edit", and "View". Below the menu bar is a toolbar with icons for "Insert", "Save/CI...", "Delete", "Print", and "Close". The "Save/CI..." button is highlighted with a black arrow.

The main content area shows a table of patron information:

p10147263		Last Updated: 09-14-2010		Created: 09-14-2010		Revisions: 2	
Expiration Date	12-18-2010	Birth Date	- -	Current Item B	0	ILL Request	0
Patron Code 1	u UNDERGRADUATE	Home Library	none	Current Item C	0	Current Item D	0
Patron Code 2	- ---	Patron Message	- NO MESSAGE	Last Circ Activity	- -	Preferred Language	
Patron Code 3	0 Discipline	Manual Block	- ---	Notice Preference	- NONE		
Patron Type	0 Undergraduate Student	Claims Returned	0				
Total Checkouts	0	Money Owed	\$0.00				
Total Renewals	0	Current Item A	0				
Current Checkouts	0						

Below the table, a message is displayed:

**Message:** Student must have CC ID, already used driver's license  
**Name:** Flintstone, Fred  
**Address:** 301 Cobblestone Way  
Bedrock, 70777  
**Telephone:** 555-555-5555  
**Barcode:** 0188408  
**Email:** [fred.flintstone@ymail.champlain.edu](mailto:fred.flintstone@ymail.champlain.edu)

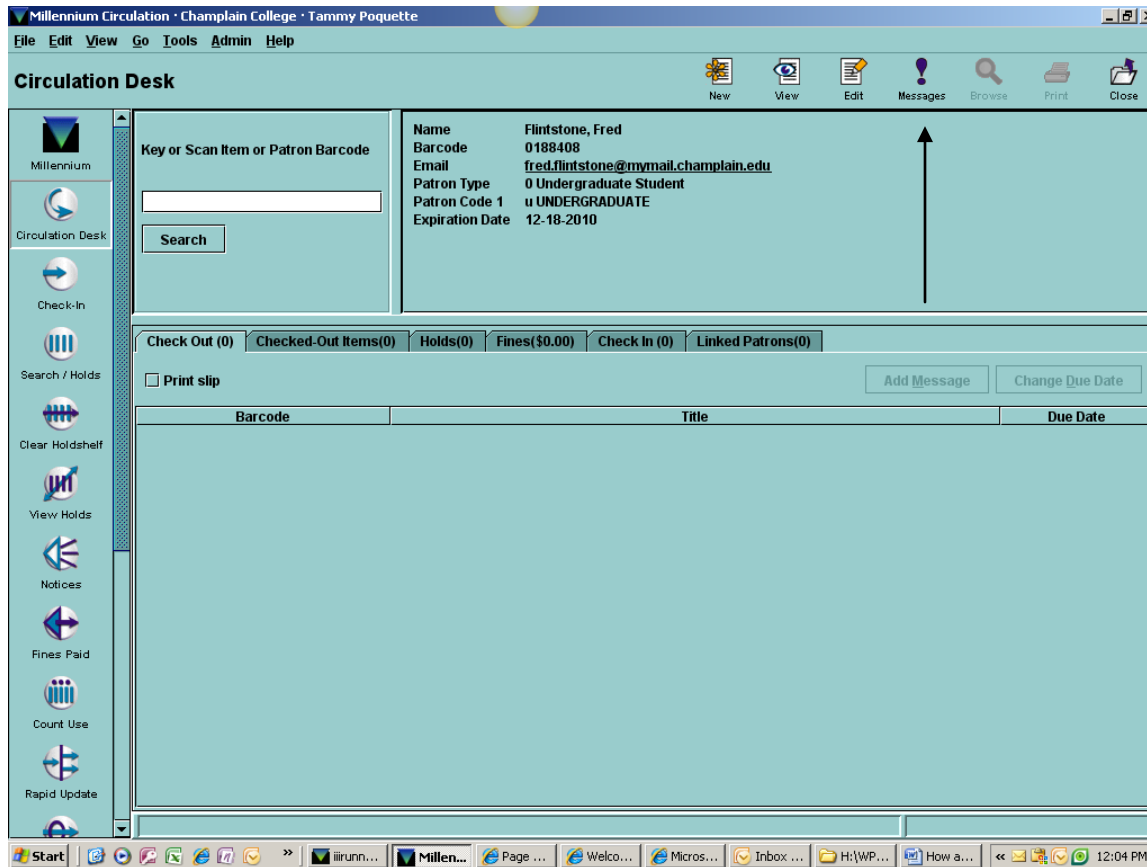
The "Save/CI" button is highlighted with a black arrow, and the "Message" field is also highlighted with a black arrow.

The interface includes a sidebar on the left with various icons for "Millennium", "Circulation Desk", "Check-In", "Search / Holds", "Clear Holdshelf", "View Holds", "Notices", "Fines Paid", "Count Use", and "Rapid Update".

The bottom of the screen shows the Windows taskbar with the Start button and several open applications, including "Millennium", "Page...", "Welco...", "Micros...", "Inbox...", "H:\WP...", and "How a...". The system clock shows 12:01 PM.

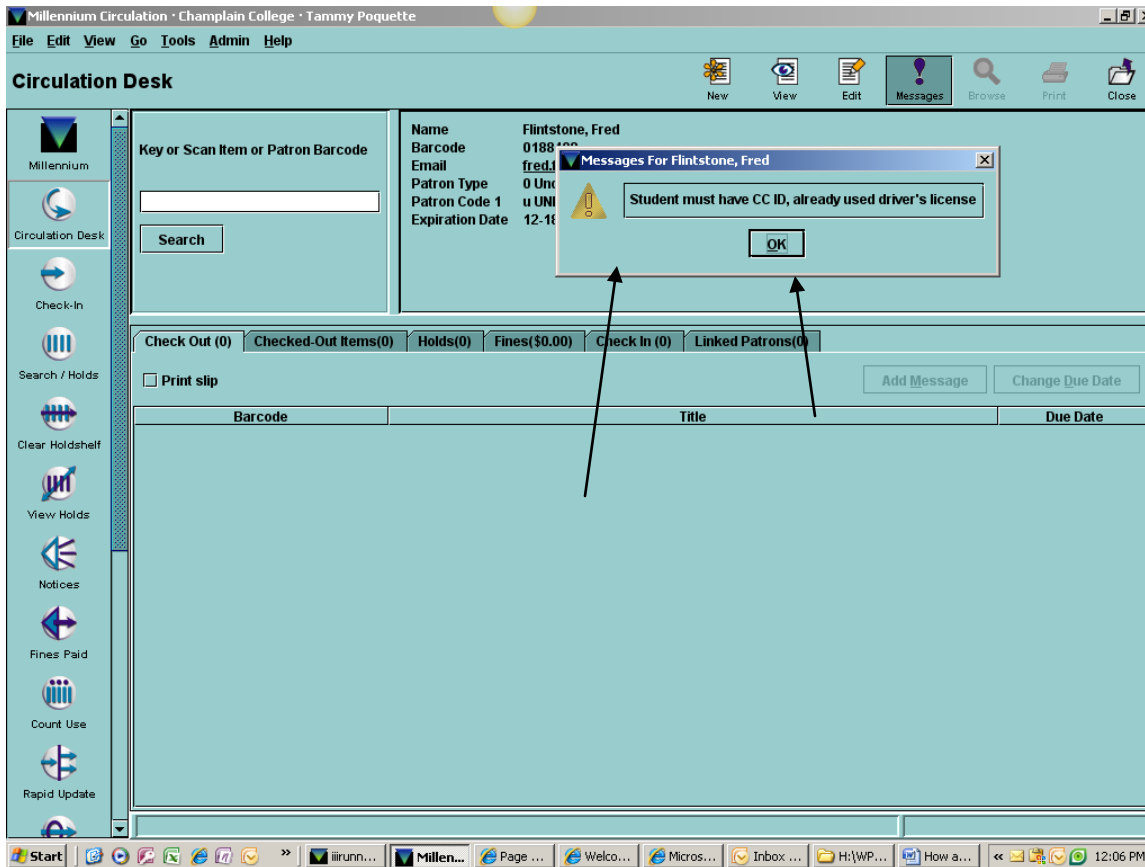
Appendix A

This will bring up the finished screen. If you look at the “Messages” icon, you will notice that it is now highlighted with a purple exclamation point



## Appendix A

Clicking on the “Messages” icon will bring up all the messages on that person’s account. Click “OK” to get out of the message.



## Appendix A