

# ALMA QUICK TIPS: Adding Patrons on the Fly

Fulfillment

1. In the Fulfillment menu, click **Manage Patron Services**
2. Scan the patron's library card or enter the patron's barcode or name; click **Go**

Patron Identification

Scan patron's ID or search for patron \*

 Use proxy

3. If the patron's record is not found, click **Register New User**

Patron Identification

Go to Return Items Cancel Register New User

Scan patron's ID or search for patron \* beyonce

Use proxy

Patron was not found.

4. Upon presentation of a valid photo ID, complete all required fields on the **Quick User Management** page with the new patron's information. Required fields are marked with a ★.

Quick User Management

Cancel Update User

User Details

USER INFORMATION

First name ★

Middle name

Last name ★

Preferred first name

Preferred middle name

Preferred last name

Primary identifier ★ 278378350005274

Title

PIN number  Generate

*Note #1: The Primary Identifier field will auto-populate according to your institution's configuration settings. Modify this number as needed in accordance with your institution's protocols.*

*Note #2: Your institution's configuration settings will determine what format of phone numbers are accepted when registering new users. See the parameter **phone\_regex** in **User Management > Other Settings**. If you are getting a "Field phone number must be numeric" error message, enter the following syntax in the **phone\_regex** configuration field: `^([0-9(\(|\)|+|-]*)$`*

5. If the user you are registering is an external user, such as a new student, select "Yes" in the **Patron has institutional record** area. If the user is internal, such as a community patron, select "No".

USER MANAGEMENT INFORMATION

Patron has institutional record  Yes  No

Password

Verify password

Force password change on next login

EMAIL ADDRESSES

Email types \*  Alternative  Personal  School  Work

Email address

6. Click on **Update User** to save.

Cancel Update User

Middle name

Preferred first name

Preferred last

7. The user record will appear as confirmation that they have successfully been added to the system. You may then proceed to check out items to the patron in the **Scan Item Barcode** field.

Edit User Info

Submit Request

Refresh Blocks/Notes

Done



Knowles, Beyonce

Active balance 0.00 USD  
ID 278388130005274  
User group -

Send Activity Report  
Send Requests Report  
Send Return Receipt

User Notes

Add Note

Loans

Returns

Requests

Network Activity

Scan item barcode \*

Look-up or select



OK

Create Item