

Customer Online Self-registration – Guidelines & Process (March 16, 2012)

- 1) **Only for citizens of Edmonton**
Postal code will be checked (based on first two characters, e.g. t5 or t6)
- 2) **Only for EPL-ADULT cards (\$12 and 12 months) and EPL-JUV (\$0 and 24 months)**
Created as EPL-SELF and EPL-SELFJ user profiles
Cards that have not been activated within 30 days will be automatically barred. A reminder email will be sent to the customer 1 week before the card is barred (23 days after registration)
- 3) **No waiving option for adults**
No free adult card option online. Will provide info (same as for self-renewal). Customer can talk to staff about having the fee waived when they activate the card. The adult fee is automatically applied at the time of self-registration.
- 4) **Required information**
 - a. First name, last name, Email
 - b. Address (street + postal code) - city and province pre-filled
 - c. Birth date (program will automatically assign adult or juvenile profile based on date)
 - d. Telephone and Home library
 - e. Middle name is OPTIONAL
- 5) **De-duplication**
De-duplication is based on a combination of last name, first name, first initial of middle name (if present) and address. Very specific and only partially effective.
- 6) Temporary Library card number shown on success screen; this is the user ID that the customer can be located under in Workflows. **PIN is emailed**. These are kept separate for security.
- 7) Successful Self Registrations would lead customers to **Bibliocommons** so they can register and create a username. Once a username is created in Bibliocommons adults can pay \$12 membership via online payment.
- 8) **Services offered** after self-registration and **before in-person card activation**
EPL-ADULT cards with paid memberships and EPL-JUV cards would be able to place holds and access most databases (only those DBs which rely on EZ Proxy for authentication).
 - can NOT access Freegal, Freading, Overdrive or One Click
 - can NOT to check anything out
 - can NOT to logon to Public PCs
- 9) **Card Activation**
Customer need to visit an EPL location and show appropriate address/ID information to a staff person to fully activate the card. Staff steps:
 - a. Check to ensure a duplicate card does not exist. If a duplicate card exists, investigate
 1. If the old card has **no holds** and **no fines** and has **expired**, change the profile to “EPL-CANCEL” and activate the new card.
 2. If the old card **has not expired** or **has fines** or **holds** replace the old card, and change the profile on the temporary virtual card to “EPL-CANCEL”.
 - b. Confirm that the information entered in Workflows is correct. Pay particular attention to the address format (see [User Information & Maintenance](#) for correct address formats).
 - c. Use the Lost Card wizard to replace the temporary barcode with the actual plastic card.
 - d. Change the user profile from EPL-SELF/EPL-SELFJ to EPL-ADULT/EPL-JUV (or other profile as appropriate).
 - e. If the membership fee has not yet been paid, take payment or waive as required. The card is now ready for use!