How can I reregister borrowers if they expire?

Last updated: Fri, 25 Jun 2021 19:02:09 GMT

Applies to

• Amlib Borrower
• Amlib Supervisor
• Amlib Circulation

Answer

Borrowers can be set to expire after a certain number of months or at a specific date. This will not delete the borrower but require a reregister by staff. This provides an opportunity for staff to check that the Address and Phone details of the borrower are still correct.

Some libraries do not want borrowers to expire. For example at schools the students may be updated from a file arranged by the Administration Department so no expiry is necessary. Therefore setting expiry is by parameters so each site can choose how to handle the expiry.

The main parameters are set in Main > Supervisor > Installation. Once there, click the Installation Menu and select Choose Location. Highlight the relevant location and click OK.

The Location selected will now display at the top of the Parameter Table.

Click the Borrower Button. The parameters related to re-registration will display at the top

1. A borrower is re-registered by (D)ate, (M)onths or (N)o re-register: Enter D,M or N in the Value column.
2. A borrower's registration will expire every ### months: If the above parameter is set to M for Months, specify the number of Months to expire. For example, 36 for the re-registration to occur every 3 years.
3. A borrower's registration will expire on the following date: If the above No 1 parameter is set to D for Date, specify the date when the re-registration will occur. For example re-registration will occur on 31/12/2022.

The parameters for Re-registration can also be set in Borrower Types (these parameters overwrite those set in the Supervisor Module).

To set the value for specific Borrower Types go to Main > Borrower Types. Set the Exp Days or Exp Date column if required.

Once the Borrower has expired, they would need to re-register before allowing any activity on the system.
Re-registering

Borrowers can be re-registered from Borrower > Borrower Menu > Reregister: Libraries often use this feature as a reminder to check the contact details to ensure that they are up to date on the Borrower record.

1. Enter the new Registration Date in dd/mm/yyyy format or accept the New Reg date as calculated by the defaults as set in Supervisor > Installation or Borrower > Borrower Types.
2. Click OK to continue.

If an expired Borrower tries to issue an item, a message will display "The Borrower is due for re-registration. Re-register now?". If Yes is chosen, the Registration Date window will display with the Default registration set from the defaults already set and OK will automatically update the registration date.

If required it is also possible to Re-register via a Mass Change of a Borrower File. However, checking of current contact details cannot be done. If this is required, please contact OCLC Support.

Page ID
36831