
Room Reserve - Patron Records

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Room Reserve Patron Records Patron records (Contact Information) are created in Room Reserve when someone requests a room. These records are maintained in Room Reserve until all reservations or requests that they are attached to are deleted. A patron record will be attached to a reservation or request until the it is deleted. **Identification of Patron Records** Patron records are uniquely identified by 2 possible methods; a combination of Contact Name and Primary Phone Number or by library card number. By Default, Room Reserve uses the Contact Name and Primary Phone number method. Library card number is used only when the system is configured with a number in "[Library Card Number Length:](#)" that is not 0 and a library card number is submitted with the request. **Method 1 (Contact Name and Primary Phone Number):** This is the default state of Room Reserve. When this method is used, a patron is identified by a combination of these fields. This means that when a patron requests a room, if they spell their name differently or enter a different primary phone number, a new record will be created. For example; This record exists in Room Reserve: Contact Name: Richard Chambers Primary Phone: 111-222-3333 If this patron registers with the following information, Contact Name: Rick Chambers Primary Phone: 111-222-3333 then a new record will be created and he will be in the system twice. Once with the contact name of "Rick Chambers" and once with the contact name of "Richard Chambers". If this patron then registers with the following information, Contact Name: Rick Chambers Primary Phone: 111-222-3334 a new record will be created and he will be in the system 3 times. This can cause confusion because doing an patron reservation look-up can generate different results. Doing a look-up for "Rick" will generate 2 records and not include the 3rd record. **Method 2 (Card Number):** Setting a value for "Library Card Number Length:" and requiring the Library Card entry will cause Room Reserve to validate the library card number before allowing them to make a reservation request. If the library card number is the proper length (according to this setting) then they will be allowed to complete the request. Completing the request will cause the system to store/update their record according to the following rules: If a patron record does not exist in Room Reserve, it will be created with the information on the request form. If a patron record already exists in Room Reserve (based on the library card number), then the following fields will be updated if they are not blank on the request form: Secondary Phone Number Email Address Address Fields Fax Number This method is a good choice if your reservation process requires a library card but allows for the same library card number to be used for multiple requests (as with a business that has multiple employees use the same library card number). **Method 2 (Card number with Authentication):** Enabling authentication against an ILS system will cause Room Reserve to validate a patron before allowing them to request a room. If the ILS system authenticates the patron, their information is pulled from the ILS and they are allowed to submit the request. When they complete the request the system will store/update their record according to the following rules: If a patron record does not exist in Room Reserve, it will be created with the information on the request form. If a patron record already exists in Room Reserve (based on the library card number), then the following fields will be updated if they are not blank on the request form: Secondary Phone Number Email Address Address Fields Fax Number
NOTE: These field are pulled from the ILS system and can be updated by the patron before completing the request.

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