
Events-Patron Records

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Events Patron Records Patron (Attendee) records are created in events when someone registers for an event. These records are maintained in Events until they are manually deleted by a staff member. A patron record will be attached to an event until the event is deleted or until the event is archived if "Remove Attendee Information when Archiving:" is enabled. Once a patron record is no longer attached to an event it can be deleted by staff. **Identification of Patron Records** Patron records are uniquely identified by 2 possible methods; a combination of First Name, Last Name and Primary Phone Number or by library card number. By Default, Events uses the First Name, Last Name Primary Phone number method. Library card number is used only when the system is configured to require authentication with an ILS system and ["All Events Requiring Registration"](#) is enabled and "LOCKDOWN" is enabled.

NOTE: "LOCKDOWN" is a factory setting that can be enabled by Evanced support staff for your installation.

Method 1 (First Name, Last Name and Primary Phone Number): This is the default state of Events. When this method is used, a patron is identified by a combination of these fields. This means that when a patron registers, 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 Events: First Name: Richard Last Name: Chambers Primary Phone: 111-222-3333 If this patron registers with the following information, First Name: Rick Last Name: Chambers Primary Phone: 111-222-3333 then a new record will be created and he will be in the system twice. Once with the first name of "Rick" and once with the first name of "Richard". If this patron then registers with the following information, First Name: Rick Last Name: 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 attendee look-up can generate different results. Doing a look-up for "Rick" will generate 2 records and not include the 3rd record. **Method 1 with Authentication:** Enabling authentication against an ILS system (per event) will cause Events to validate a patron before allowing them to register for an event. If the ILS system authenticates the patron, their information is pulled from the ILS and they are allowed to continue registering for the event. When they complete the registration the system will store/update their record according to the following rules: If a patron record does not exist in Events, it will be created with the information on the registration form. If a patron record already exists in Events (based on First Name, Last Name and Primary Phone Number), then the following fields will be updated if they are not blank on the registration form: Email Address Library Card number Address Fields

NOTE: These fields are pulled from the ILS system and can be updated by the patron before completing the registration process.

This method is a good choice if your registration process requires a library card but allows for the same library card number to be used for multiple registrations (as with a mom and her children). **Method 2 (Card Number):** This method is enabled by using authentication with an ILS system, requiring library cards for all event registrations and enabling "LOCKDOWN".

NOTE: "LOCKDOWN" is a factory setting that can be enabled by Evanced support staff for your installation.

Once this method is enabled the Events system no longer identifies patrons by First Name, Last Name and Primary Phone Number. It uses the library card number as the primary identification for patrons. A registration with a new library card number will cause the system to create a new record based on the information pulled from the ILS system. A registration with an existing library card number will update the patron record in Events with data pulled from the ILS system (Name, Phone, Email address and Address fields). This method should be used when the ILS system is considered the "Master" database containing current data and every registrant is required to have a unique library card number. This will NOT work for a mother trying to use her card number to register her children. In that case, she would have to use each child's library card number in order to register them individually.

Custom Fields Applicable To: All Users**Attachments:** No**Summary:** Describes how a patron record is created in Event, the unique identifiers, and what is referenced when using preserved through authentication.

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