

## VERSO TECHNICAL BULLETIN

v.1 released 4/29/2021

### Configuring VERSO to handle preferred and legal versions of patron names

**Summary:** It is important for patrons to feel respected and included in a library’s user community. One of the easiest ways for libraries to support this is to honor the patron’s name preference in Circulation, and on any library notifications.

In some jurisdictions, the library is required to store and retain the legal name in the patron record, because the library is a government entity and may need to interact officially with the patron for financial or other reasons. However, in the library’s day-to-day interaction with that patron, using the preferred name is more customer-friendly and approachable.

This document describes how to configure VERSO to store and display both the official and preferred versions of the patron’s name.

#### I. USER ADMIN / Configure User Record

**NOTE 1: Consortia and multi-branch systems** - A change you make in User Config is used across all libraries in the consortium, so make sure that you inform and train staff about patron screen changes and what to expect!

**NOTE 2: Permissions** - To make these User Config changes, you must have User Admin permission.

1. Navigate to User Admin, then **Configure User Record**
2. In Configure User Record, find **First Name**, then edit the label to read ‘First Name (preferred)’, as shown in green below.

53	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reminder Question	Reminder Question	Languages
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	First Name	First name (preferred)	Language Edit label in User Admin
4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Initial	Middle Initial	Language

3. Scroll down to **Library Defined Fields** and find an unused one. Pay attention to the sequence number of 'First Name' – i.e., in the above example, it is #2. In the example below, I used Library Defined Field 15 – you can pick any from your own configuration.
4. In the Library Defined Field you chose, enter the sequence number (in this case, #3) to be the **next number after First Name**. Make sure to mark the checkbox on the left in order to include that new field in the patron record display.

Finally, edit the **label column** on the right to read 'Legal (given) name' or the words of your choice.

3	<input type="checkbox"/>	Text	Library Defined Field 13	Library Defined Field	Languages
40	<input type="checkbox"/>	Text	Library Defined Field 14	Library Defined Field	Languages
3	<input checked="" type="checkbox"/>	Text	Library Defined Field 15	Legal (given) name	Languages
41	<input type="checkbox"/>	Text	Library Defined Field 16	Library Defined Field	Languages
42	<input type="checkbox"/>	Text	Library Defined Field 17	Library Defined Field	Languages
42	<input type="checkbox"/>	Text	Library Defined Field 18	Library Defined Field	Languages

5. Now for some detail work: in the step above, we assigned the Library Defined Field to sequence #3. Since the system cannot have duplicate sequence numbers, all of the sequence numbers above #3 **need to be incremented by one**. The old #3 becomes #4, the old #4 become #5, etc. The highest number is #53. Take your time to do this correctly.
6. **SAVE (SUBMIT)** the Configure User Record page.
7. Log out, then log in to view your changes.

## II. How the names appear in Circulation:

**Note:** *In the screens below, Frankie is the preferred name and Francis is the legal name.*

1. In **Patron Status & Checkout – Edit User Account**, the preferred name displays first (remember, this was #2 in the configuration sequence), followed by the Legal (given) name, which was previously the Library Defined Field we assigned as sequence #3.

### Edit User Account

Submit Copy Cancel

\*Fields identified by \*and red color must be filled in.

\*Login Name or Barcode: 333

\*Home Location: Dodgeville Public Library

\*Password: ...

\* Confirm Password: ...

First name (preferred): Frankie

Legal (given) name: Francis

Middle Initial: M

Last Name: Sinatra

Address 1: 341 Redruth Dr.

Address 2:

City: Dodgeville

## 2. Patron Status & Checkout – you can search using the ‘preferred’ name

Circulation > Patron Status & Checkout

Select a Patron

All User Groups

sinatra, frankie AND IN (Select an Index) Submit

Future Checkout Date: 04-27-2021 Remember Checkout Date

*Search using preferred first name*

Or you can search using ‘legal’ name if you select the specific index as shown below in green.

Select a Patron

*Legal name using that index*

All User Groups New Patron Previous Patron

sinatra AND francis IN Legal (given) name Submit

Future Checkout Date: 04-26-2021 Remember Checkout Date

Either search finds this patron record, which **displays the preferred name** to staff.

Patron Barcode	Name	Patron C
333	Sinatra, Frankie M	resident adults

Go into the Circulation record. Staff circulation screens **always display the 'preferred' form** of the name; staff always knows how the patron wants to be addressed.

**WARNINGS**

Patron: **Frankie M Sinatra** Barcode: 333 Type: resident adults

**You cannot continue with this patron.**

Now to the PS&C pages:

Circulation > Patron Status & Checkout

**Warnings** Checkout Patron Summary Items Out

Refresh Patron Edit Payments/Fines History Notices History Receipt

User: **Frankie M Sinatra** Barcode: 333 Type: resident adults [Not Frankie Sinatra ?](#)

Enter Item Barcode Submit

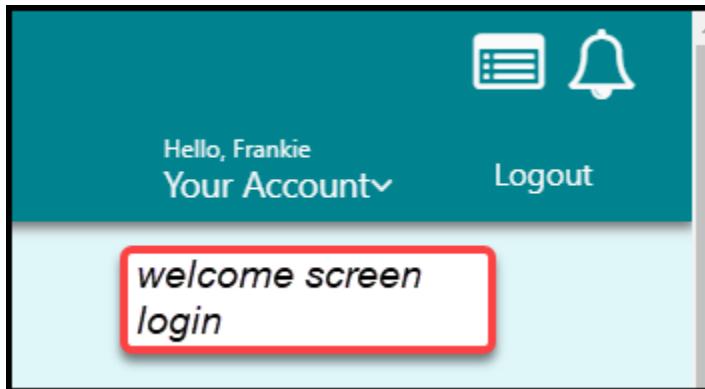
Barcode Checkout

Item Checked Out On 4/26/2021

The 'preferred' patron name also appears on **overdue notices, hold pickup slips, and other communications from the library.**

### III. What the patron sees in PAC

1. The patron is welcomed with his/her preferred name.



**In My Account – Profile, the patron’s preferred name is shown.** *Note: the library can configure the patron’s PAC profile to show the legal name as well. In addition, staff can configure VERSO to allow or disallow editing of patron fields. In this example, the only field that can be edited by the patron is the password. For further information, consult the User Admin documentation.*

The image shows a screenshot of a web form titled 'Your Profile'. The form has a light blue background. On the left side, the text 'Your Profile' is displayed. To the right, there are several input fields. The first field is 'Password' with a white input box containing three dots. Below it are 'First name (preferred)' with 'Frankie', 'Middle Initial' with 'M', 'Last Name' with 'Sinatra', 'Address 1' with '341 Redruth Dr.', and 'Address 2' which is empty. A red-bordered box highlights the text: 'Patron profile in PAC - can show either version of name \*and\* allow or disallow the ability to Edit it'.