



# Patron Tracker

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# Patron Tracker

## Foreword

Good morning,

“It was the best of times; it was the worst of times...” (Dickens 1902) That has been one of my favorite lines in a book for many years

Patron Tracker has been a concept of mine for several years. That concept was an idea to create a way to handle the Attendance in FamilySearch Centers, allowing them to get away from a paper sign in sheet.

I kept letting other things get in the way of developing this software. Finally, this summer, I decided to get started on Patron Tracker. I wanted to build the program for a couple of reasons. One, I wanted to see a program through from start to finish. I wanted to experience that concept to final executable file – this is to build my confidence in my ability make a program that is useful. Second, I am hoping that the program will be approved and allowed to be used.

As I started building the database, I thought of other things that Patron Tracker could help with, such as pre-registering for Classes and Events. There were thoughts about what tables do I need, what would be in them, how would they need to be connected together. Many plans must be thought of and decided.

As I built the initial database and program, I continued developing all the things that Patron Tracker could do and help with. So, as I thought of them, I added what seemed to be useful.

I am sure that as Patron Tracker is being used, those using it will find things that they want it to do and handle for them. Those ideas are certainly welcomed and encouraged. I do hope that users will have ideas as well as report any issues that may occur.

I do hope that Patron Tracker will be approved, allowed to be installed, and useful as it is intended.

Thank you,

Michael Griffith

# Patron Tracker

## Introduction

Patron Tracker is a new way to keep attendance in FamilySearch Centers. Currently, patrons come in and sign in on a piece of paper indicating the reasons they are visiting the center on a given day.

Those sign-in sheets are then counted, not just the names to find out how many patrons came to the center, but also each of the checkmarks to identify how many patrons utilized the center in various ways, from attending a class to searching websites, etc.

This process takes time, even if done on a weekly basis.

Patron Tracker intends to help with this process. It makes attendance quick and easy, just put in your email address, your password and check the boxes to indicate your reasons for your visit (like what you do with the sign in sheet) and click the Login button.

This is a rather simple process, and it allows Patron Tracker to provide a report of the attendance in seconds.

In addition, Patron Tracker can provide the ability to Pre-Register for events and classes, with a simple selection and click of the Yes box. Repeating the pre-registration steps allows you to register for multiple classes and/or events at one time.

Patron Tracker does require that you share personal information, such as Name, Address information, Phone (optional) (as well as Stake and Ward information if you are a Member of The Church of Jesus Christ of Latter-Day Saints). The Church of Jesus Christ of Latter-Day Saints, FamilySearch, FamilySearch Center and Patron Tracker will **NEVER** sell or use your information outside of this program in this Center.

# Patron Tracker

## Getting Started

Currently, the Setup and Installation will be handled by the maker of Patron Tracker in conjunction with the Stake Technology Specialist.

## Features

Patron Tracker handles the Attendance of the FamilySearch Center, similar to the sign in sheet currently used.

Patron Tracker can handle a patron's Pre-Registration for Events and Classes.

Patron Tracker can provide various reports such as:

- Attendance

- Patron Event/Class List

- Mailing and other labels

- Etc.

## Getting Started...User Screens

### Main / Login

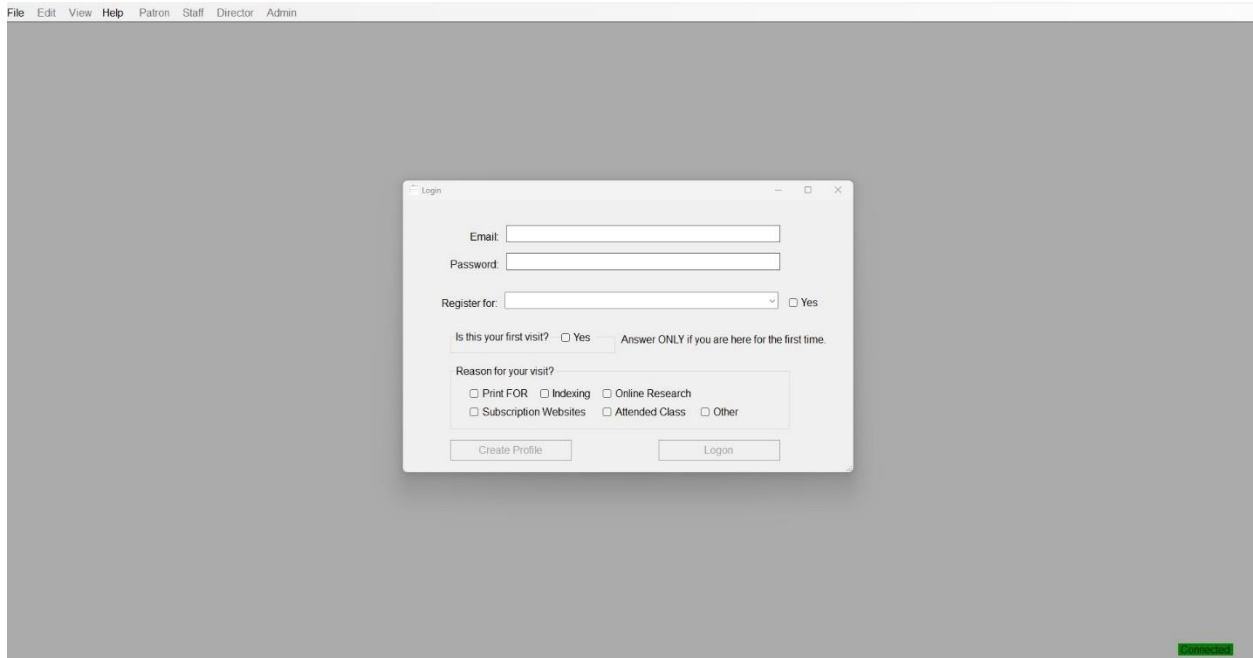


Figure 1 Main screen with Login screen

This is the Main screen in the background.

The screen in the middle is the Login Screen. This is where you start.

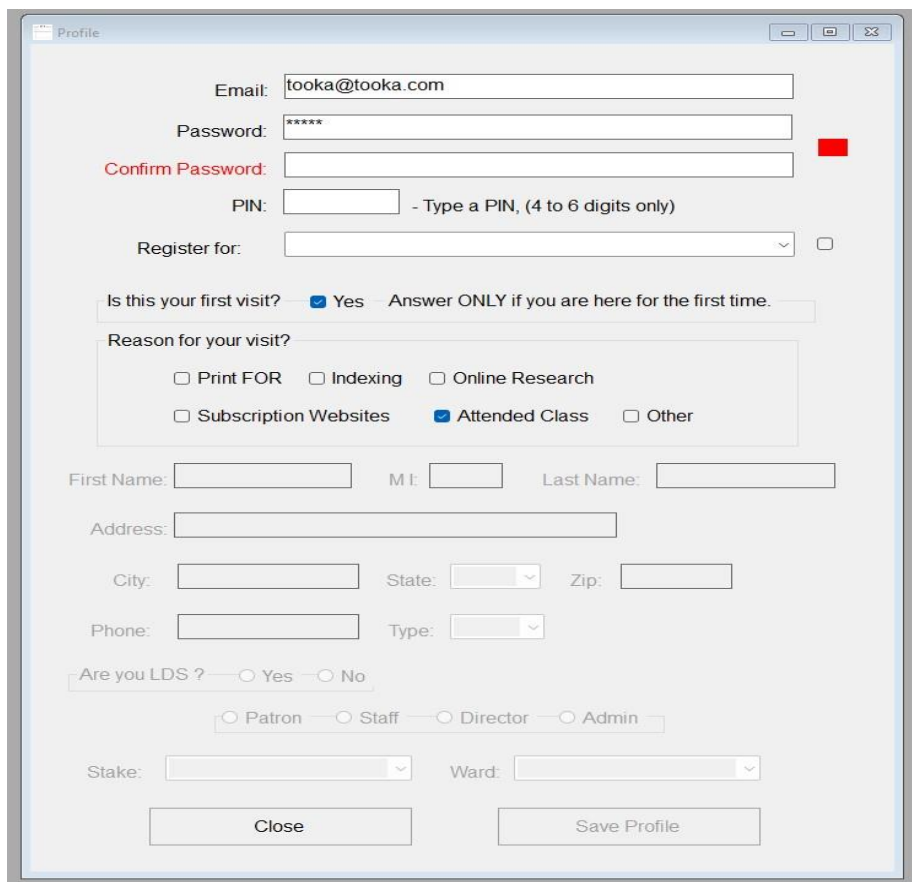
Follow these steps:

1. Enter your email address in the box next to Email.
2. Enter your password in the box next to Password: (write your password down).
3. If you wish, you can Register for Classes or Events.
  - a. Select an event or class from the dropdown box (arrow on far-right side)
  - b. Click the check box on the right labeled Yes.
  - c. Repeat steps a and b for each additional Event or Class you want to register for.
4. Is this your first visit (to this FamilySearch Center), if so, click Yes. If not, leave it blank.
5. Reason for Visit: Click the box next to each item you plan to do.

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- a. Example: If you are here for a class, click Attend Class.
6. Now, for the buttons at the bottom:
- a. If the Login button is active, click the Login button and you are done.
    - i. Your Reason(s) for your visit and any classes or events you registered for are recorded.
  - b. If this is your first time at this center, the Create Profile button is activated. This means we need to have you build your Profile (It's not hard).
    - i. All the information you entered or clicked on the Login screen will be copied to the Profile screen.

## Create Profile



Profile

Email:

Password:

Confirm Password:

PIN:  - Type a PIN, (4 to 6 digits only)

Register for:

Is this your first visit? ☒ Yes Answer ONLY if you are here for the first time.

Reason for your visit?

☐ Print FOR ☐ Indexing ☐ Online Research

☐ Subscription Websites ☒ Attended Class ☐ Other

First Name:  M I:  Last Name:

Address:

City:  State:  Zip:

Phone:  Type:

Are you LDS? ☐ Yes ☐ No

☐ Patron ☐ Staff ☐ Director ☐ Admin

Stake:  Ward:

Figure 2 Profile screen not filled out.

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This is the Create Profile screen. This is where you will enter your Personal Information. Notice that your email address, password and your Reason for Visit have been copied over from the Login screen. What you cannot see is that the event(s) you registered for are also copied from the Login screen.

Now let's finish the Profile:

1. Retype the password you typed in the Login screen. If it matches the password box, the "Confirm Password will turn black and the red light on the right will turn green. (Notice that the Name/Address information is now active)
  - a. If you already have forgot your password, write one down on paper to keep and enter that password into the Password box, then retype that password into the Confirm Password box. Again, if they match, the light will turn green.
2. Type in a PIN number. It must be 4-6 digits, NO letters. Write this down as well as the password you wrote down.
  - a. The PIN is used to confirm you are authorized to access certain screens.
3. You can skip to the First Name field if you have your attendance marked.
  - a. Enter your First Name.
  - b. Enter your Middle Initial (or your Middle Name if you desire).
  - c. Enter your Last Name.
  - d. Enter your Address.
  - e. Enter your City.
  - f. Select your State from the dropdown list.
  - g. Enter your Zip (this only allows no more than /no less than 5 digits)
4. Are you LDS?
  - a. If you are not a member of The Church of Jesus Christ of Latter-Day Saints, then click No.
    - i. Patron is automatically selected, and the Save Profile button is active. Click Save Profile. Your information is saved, and you are logged in for the day.
    - ii. See below for a screen shot of what your screen should be looking like.



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The screenshot shows a web browser window titled "Profile". The form contains the following fields and options:

- Email:
- Password:
- Confirm Password:
- PIN:  - Type a PIN, (4 to 6 digits only)
- Register for:
- Is this your first visit? ☒ Yes Answer ONLY if you are here for the first time.
- Reason for your visit?
  - ☐ Print FOR
  - ☐ Indexing
  - ☐ Online Research
  - ☐ Subscription Websites
  - ☒ Attended Class
  - ☐ Other
- First Name:  M I:  Last Name:
- Address:
- City:  State:  Zip:
- Phone:  Type:
- Are you LDS ? ☐ Yes ☒ No
- ☒ Patron ☐ Staff ☐ Director ☐ Admin
- Stake:  Ward:
- Buttons: Close, Save Profile

Figure 3. Profile screen filled out.

- b. If you are LDS, click Yes
  - i. You will have the option to select Patron or Staff. If you do not work a shift in the Center, click Patron. If you work a shift, click Staff.
  - ii. Now you need to select your Stake and Ward.
    1. The Denton Stake and Wards are pre-loaded, you can select them as appropriate.
    2. If your Stake and/or Ward is not listed, you can type in your Stake and/or Ward name, and they will be recorded.
  - iii. Note that the Save Profile button just became active.
  - iv. Click the Save Profile button and all your information is now saved, and you are logged in for the day.

## Continuing...Utility Screens

### About



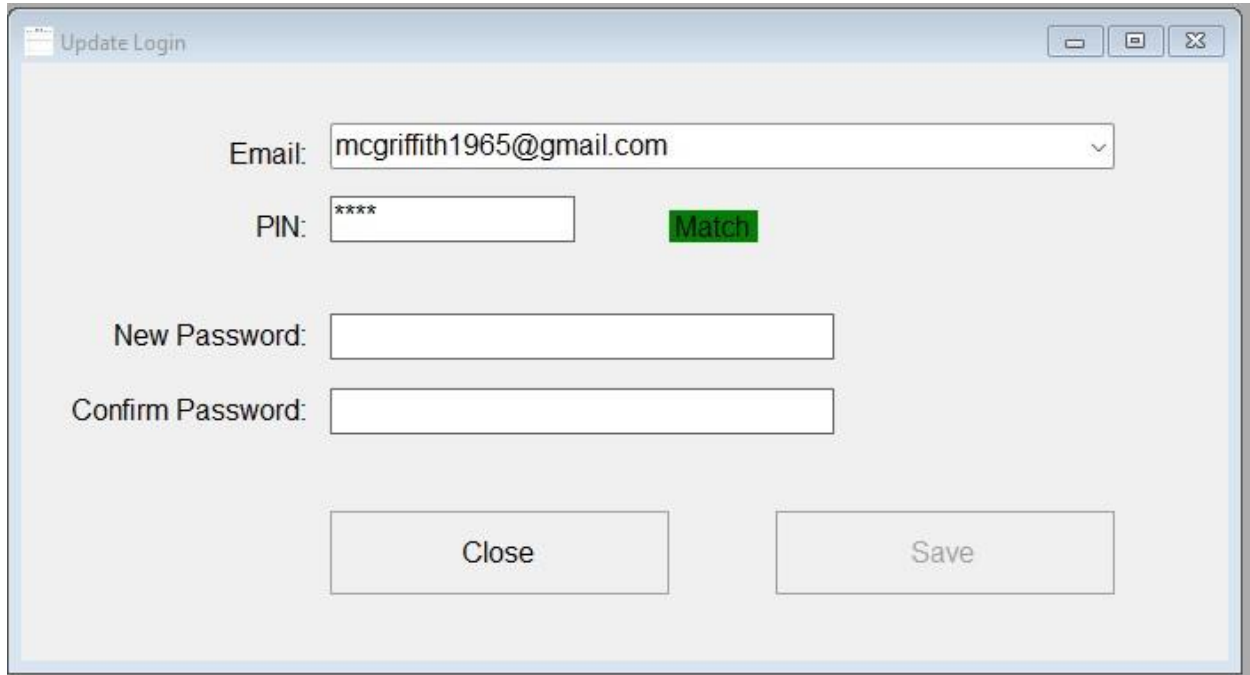
Figure 4. About.

This is the About screen. It shows the typical information – Product Name, version copyright, Registration to and number.

1. You can Close the window.

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## Update Login

The image shows a software window titled "Update Login". It contains several input fields and buttons. The "Email:" field is a dropdown menu showing "mcgriffith1965@gmail.com". The "PIN:" field is a text box with "\*\*\*\*" and a green "Match" button to its right. Below these are "New Password:" and "Confirm Password:" text boxes. At the bottom are "Close" and "Save" buttons.

Email: mcgriffith1965@gmail.com

PIN: \*\*\*\* Match

New Password:

Confirm Password:

Close Save

Figure 5. Update Login

This is the Update Login screen which allows a Patron or Staff member to change a password for the patron. The PIN number is needed to verify authentication. This is available to Patrons, Staff, Coordinator and Admin roles.

1. Select the Patrons email address.
2. Type in their PIN number.
3. Enter a new Password.
4. Confirm the new password by re-typing it.
5. Save the new password by clicking Save.
6. If no change is made, click the Close button.

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## Update Profile

The screenshot shows a web application window titled "Update Profile". The window contains the following fields and controls:

- Email:** A text input field containing "lost@lost.com".
- PIN:** A text input field containing "\*\*\*\*", followed by a green button labeled "Match".
- First:** A text input field containing "Lost".
- MI:** A text input field containing "A".
- Last:** A text input field containing "Lost".
- Address:** A text input field containing "1 Lost Drive".
- City:** A text input field containing "Lost".
- State:** A dropdown menu showing "WY".
- Zip:** A text input field containing "87940".
- Phone:** An empty text input field.
- Phone Type:** A dropdown menu.
- Buttons:** Two buttons at the bottom, "Close" and "Save".

Figure 6. Update Profile

This is the Update Profile screen that allows a Patron or Staff to update the profile of a Patron, if mistakes were made or if information is missing. When an email address is entered and the appropriate PIN is typed in, the existing profile information will be shown. This is available to Patrons, Staff, Coordinator and Admin roles.

1. Select the email address.
2. Enter the users PIN.
3. Review the Name and Address information and correct anything that is incorrect or missing.
4. Click the Save button and the information is saved. Or click Close for no changes.

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## Fix About

Fix About Information

Patron Tracker 1

Michael C Griffith

Denton Tx FamilySearch Center 1

Close Save

Figure 7. Fix About.

This screen is used within Patron Tracker to update the Registration information instead of going to the database to make changes. This is only available to the Admin role.

## Fix Attendance

Fix Attendance

Name: Guest

Record Date: 11/11/2024

Is this your first visit? ☐ Yes Answer ONLY if you are here for the first time.

Reason for your visit?

☐ Print FOR ☐ Indexing ☐ Online Research

☐ Subscription Websites ☐ Attended Class ☐ Other

Close Save

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Figure 8. Fix Attendance

This is the Fix Attendance screen. This is used to make corrections to attendance when a paper sign in sheet must be used. This is available to the Coordinator and Admin roles.

1. Select the patron's name (or guest for someone without a profile).
2. Change the date for the attendance to be recorded on.
3. Check all the boxes that the Patron checked on the sign in sheet paper.
4. Click the Save button.
5. Repeat steps 1 – 4 for each Patron.

## Add Events

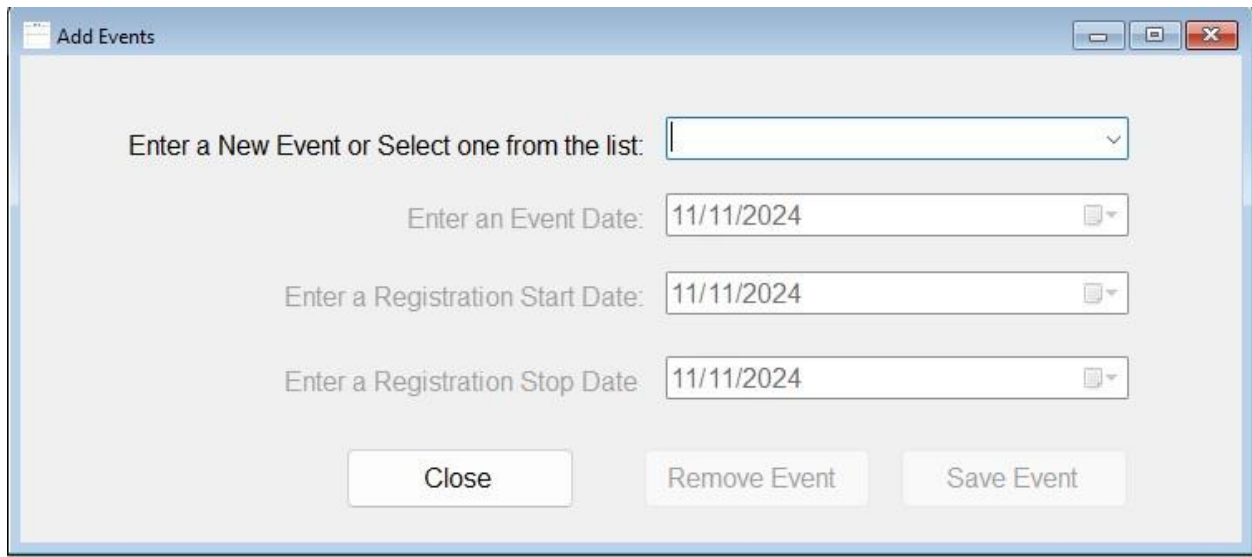
The screenshot shows a software window titled "Add Events". Inside the window, there is a label "Enter a New Event or Select one from the list:" followed by a dropdown menu. Below this, there are three date input fields, each with a label and a calendar icon: "Enter an Event Date:" with the value "11/11/2024", "Enter a Registration Start Date:" with the value "11/11/2024", and "Enter a Registration Stop Date:" with the value "11/11/2024". At the bottom of the window, there are three buttons: "Close", "Remove Event", and "Save Event".

Figure 9. Add Events

This is the Add Events screen. It handles both Events and Classes. We will use Events for both items. This is available to the coordinator and Admin roles.

1. Select an event (or type one in if a new event is to be added).
2. Select the date the event is to be held.

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3. Select the date to start Pre-registration.
4. Select the date to end Pre-registration.
5. Save the Event with the Save Event button.

Remove button. This button is used to remove an event that is cancelled or maybe entered by mistake.

1. Select an event to remove.
2. Click the Remove button.

## Reports

The screenshot shows a web application window titled "Reports". On the left side, there is a vertical menu with buttons: "Select Report/Event", "Generate Report", "Print Report", "Save Report", and "Close". The main area contains a form with the following fields:

- Report: Attendance (dropdown menu)
- Event: (empty dropdown menu)
- Type: (empty dropdown menu)
- Start: 11/ 1/2024 (calendar icon)
- Stop: 11/30/2024 (calendar icon)

Below the form, the report content is displayed:

**Denton Texas Stake  
FamilySearch Center  
Attendance Report**

11/1/2024 to 11/30/2024

First Visit	Print FOR	Indexing	Online Research	Sub Website	Attend Class	Other
7	4	4	18	6	34	24

Figure 10. Reports screen. Attendance Report (test) showing.

This is the Reports screen. It is used to select and generate reports based on the need for a specific report. This screen is available to the Coordinator and Admin roles.

Reports:

1. Click the Select Report/Event button.
2. Select the report from the Report:
3. Choose the date range if available
4. Click Generate Report

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## Events:

1. Click the Select Report/Event button.
2. Select Event from the Report:
3. Select the Event from the Event:
4. Select Normal List or Name Labels from the Types dropdown.
5. Click Generate Report

## What's left:

1. Printing – Portrait Format
  - a. Attendance Report can be printed on paper or printed to file.
  - b. Mailing Labels are printed on Avery 5160 Labels or printed to file.
  - c. Events is a placeholder for all events in the Events dropdown.
    - i. Type is required
      1. Normal List events are printed on paper or to file
      2. Name Labels are printed on Avery 5160 labels.
        - a. Those contain the name and event title on the label.
2. All Reports and Labels can be printed or saved to file if needed.

## Settings

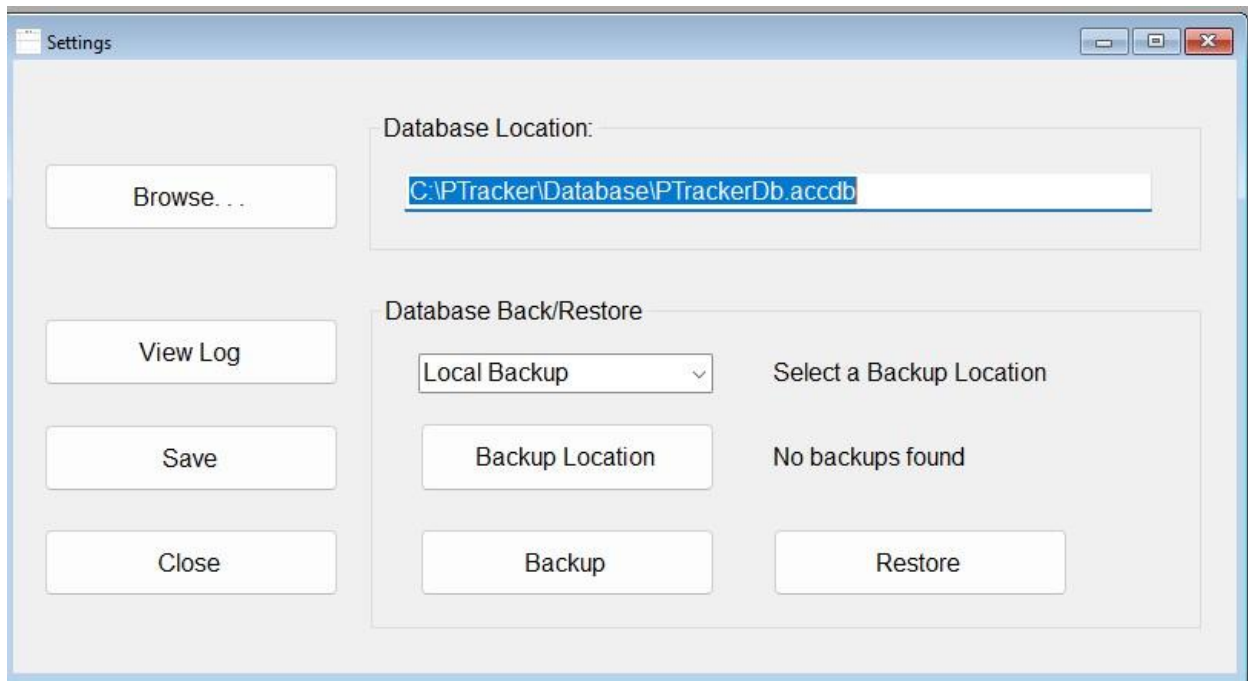


Figure 11. Settings Screen



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The Settings screen is used to identify, backup and restore the database. An activity log is also available. This is available to the Admin role.

## Patron Report

Admin

Name: Dog E Dog

PIN: 1975 Match

Select Name

Generate Report

Print

Save

Close

### Patron Class/Event List

Created: 11/16/2024

Patron: Dog E Dog

Event/Class Name	Event Date	Registered Date
Discovery Day 2025	1/25/2025	10/24/2024
Monthly Family History Activities	2/15/2025	10/24/2024

Figure 12. Patron Report screen.

This is the Patron Report screen. This provides a Patron with a list of the Events/Classes they are pre-registered for. It provides the Event Name, Event Date and when the patron registered for the event. This is available for all Roles.

Patron:

1. Click Select Name. Your name will appear and cannot be changed.
2. Type in your PIN, the red box will turn green if the PIN is correct.
3. Click Generate Report. Your report will appear in the window.
4. You can now print or save your report. Click your choice, Print or Save, follow their instructions.