

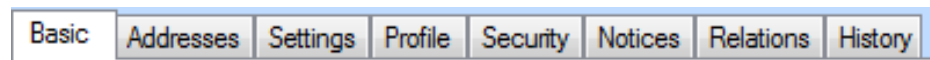


## Users – adding, editing and updating

*This procedure applies to the user record categories of Reader and Staff. The category of reader is identified in the User Details screen, as shown.*

- Reader
- Staff
- Library
- Supplier
- Institution

The **User Details** screen displays the summary of user details, with specific tabs used for different data elements.



- **Basic** tab – displays status, date of birth, user type (or category), mobile phone, email address, debarment details, and membership acceptance data
- **Addresses** tab – displays residential and postal address details.
- **Settings** tab – displays Home library details
- **Profile** tab – not used
- **Security** tab – assign and change Catalogue Pin number
- **Notices** tab – displays Overdue items and Notices
- **Relations** tab – assign and change family relations.
- **History** tab – record history for that user

### Icons explained:



- Add a **New User** record.
- **Save** changes to the current record.
- **Create** a new user registration by copying the existing one currently displayed.
- Replicates the address details from the current user to linked relations.
- Printing a user card. Not used.
- Assign next user barcode to this user. Not used.
- Save an SMS message to be sent to this user. Currently not used.
- Save an email to this user.
- **Delete** the current user record.

## 1. Adding a new user record

### Actions required:

- Go to **User Details** (F7)



- Click on the **Add a new user** icon
- Add details in the corresponding entry boxes, including User's title, First name, Initial, Last name, and Barcode no.

*Tip: ask your user if they wish to create an **Alias** – this can be used as an alternative to the barcode number when logging into the online catalogue. Additionally, if your user submits any reviews through the catalogue this will also display. If you assign an Alias use the tool to check that it is unique. If it is already taken by another user you will need to try again.*

- Complete the demographic details.
  - User Category – select either Reader or Staff
  - Gender – select as appropriate
  - Optional fields are only selected if your library has identified a requirement to collect this information– Aboriginal, Torres Strait Islander, Australian South Sea Islander
- Add details on each tab as required:

**Basic** tab – date of birth (for Junior and Young adults); User type (select from the drop-down list); Mobile Phone number; email address.

**Addresses** tab – Main address; Postal address (if different to residential address); Phone number (landline); Fax number.

**Settings** tab – these settings will default to your local details and there is no requirement to change any of the details here.

**Security** tab – assign a Catalogue PIN to all new members. Click the **Save** icon, i.e. the *Save only the user's Password and PIN* icon within the Security tab

**Relations** tab – use if your library maintains User relationships.

- Once all details have been completed click on the main **Save** icon



- The **Membership Acceptance** field will now become active. When the user is presented with their library card click on the acceptance button – this signifies that the user has accepted all terms and conditions of becoming a member of your library service on the date indicated. Click **OK** at the **Save was successful** message.



## 2. Re-Registering Expired Borrowers

Users needing re-registration are identified by the presence of the **Clock** icon. Wherever the user details are displayed the clock icon will be visible.

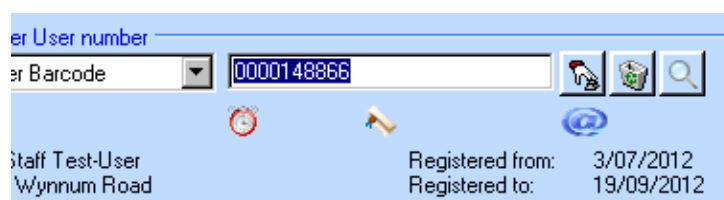
- At the **User lists** screen

No.	Surname	Given name	Initial	Title
1	Test-User	Johnny		
2	Test-User	Mandy		Miss
3	Test-User	Staff		Mr

- At the **User Details** screen




- At the **Loan** screen



*Tip: when an expired user details are displayed at the Loan screen the user barcode will be highlighted (as above) and the cursor will not move to the Item barcode area until the user details have been updated.*

**Action required:** go to the **User Details** screen (F7), check the **Registration Period** section which is highlighted in red.



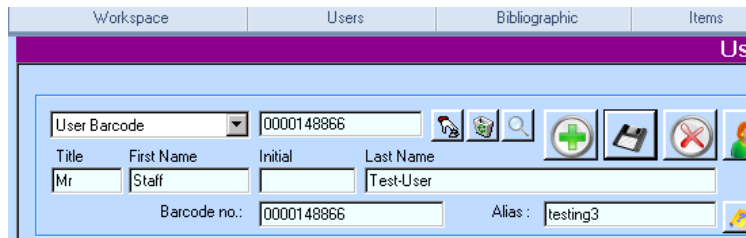
- Click on the re-registration button  and click on **OK** to continue. This will extend the user's registration for 2 calendar years.

## 3. Replacing lost cards or changing barcode numbers

For users needing a replacement card or a new barcode number go to **User Details**.

**Actions required:**

- Enter the new barcode details in the **Barcode no** field



- Click on the **Save** icon to update the details.



### 3. Deleting user records

For user records that are to be deleted go to **User Details**.

#### Actions required:

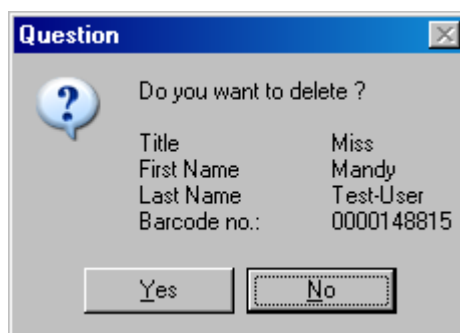
- Ensure all **Items on loan** have been cleared (you cannot delete a user with outstanding loans)

Items on-loan	0
Reservations	0
Requests	0

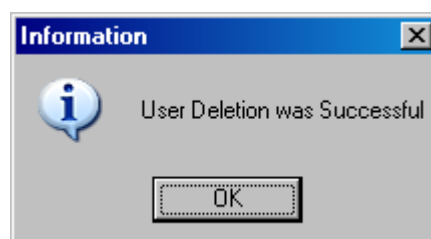
- Click on the **Delete** icon



- You will be prompted to confirm the deletion. Click on **Yes** to confirm.



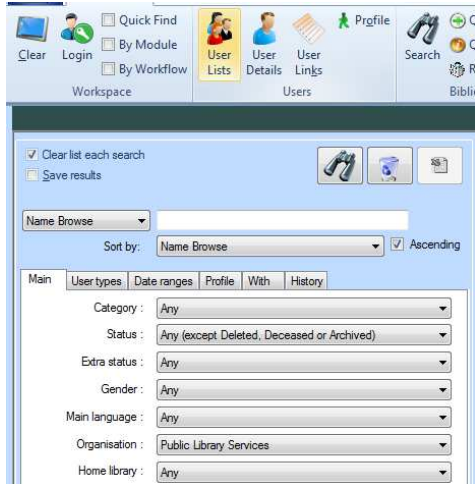
- Click on **OK** on a successful deletion.



## 4. Expired borrowers report

Every six months, run a list of expired borrowers for your library and delete or renew their records to ensure your membership records are up-to-date.

### Go to User Lists



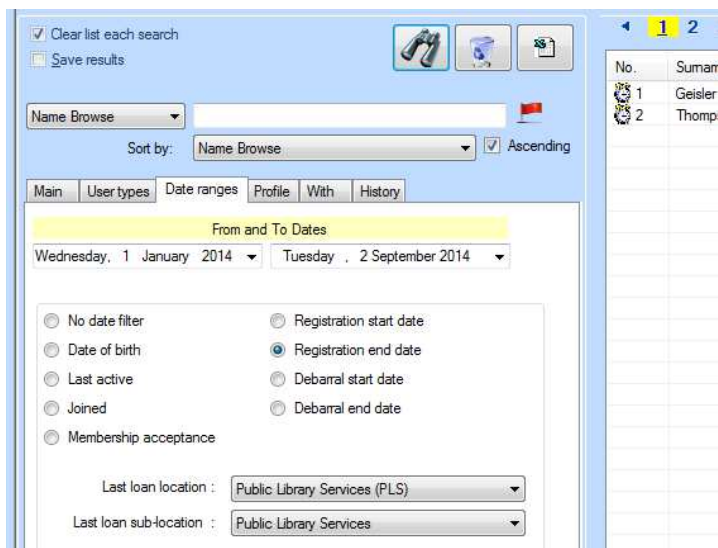
The screenshot shows the 'User Lists' interface. At the top, there are navigation icons for 'Clear', 'Login', 'By Module', 'By Workflow', 'User Lists', 'User Details', 'User Links', 'Search', 'Profile', and 'Bibliography'. Below these, there are checkboxes for 'Clear list each search' (checked) and 'Save results'. A search box is present with a 'Name Browse' dropdown and a 'Sort by' dropdown set to 'Name Browse' with an 'Ascending' checkbox checked. Below the search area, there are tabs for 'Main', 'User types', 'Date ranges', 'Profile', 'With', and 'History'. The 'Main' tab is active, showing several dropdown filters: 'Category: Any', 'Status: Any (except Deleted, Deceased or Archived)', 'Extra status: Any', 'Gender: Any', 'Main language: Any', 'Organisation: Public Library Services', and 'Home library: Any'.

### Actions required:

Go to the Date ranges tab.

- Select dates from and to (choose a 6 month date range, if running the list twice a year). Select Registration end date.

- Invoke the search, by clicking on the binocular icon 



The screenshot shows the 'User Lists' interface with the 'Date ranges' tab selected. The search filters from the previous screenshot are still visible. The 'Date ranges' section has a yellow header 'From and To Dates' and shows 'Wednesday, 1 January 2014' and 'Tuesday, 2 September 2014'. Below this, there are radio button options for date filters: 'No date filter', 'Date of birth', 'Last active', 'Joined', 'Membership acceptance', 'Registration start date', 'Registration end date' (selected), 'Debarral start date', and 'Debarral end date'. At the bottom, there are dropdowns for 'Last loan location: Public Library Services (PLS)' and 'Last loan sub-location: Public Library Services'. On the right side, a table shows the results of the search:

No.	Sumarr
1	Geisler
2	Thomp:

The list of expired borrowers will be visible on the right.

- Work on each record, by Right mouse clicking on each user's line. This will take you to User details. Take the necessary action to renew or delete the user.