



Users – allocating and changing PIN details for existing users

This procedure applies to existing user records. For new members PINs should be added at the time of registration.

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

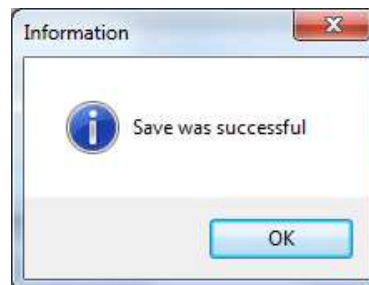
1. At the **Basic** tab check that the *Membership Acceptance* details are complete. This will be a valid date format *dd/mm/yyyy*.

Membership Acceptance:	<input type="text" value="12/03/2013"/>
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- If the field is shaded red, click on the activation icon (the green tick).

Main Language:	<input type="text" value="English"/>
<input checked="" type="checkbox"/>	Membership Acceptance: <input style="background-color: red; color: red;" type="text"/>

- Click on **OK** to acknowledge the update.



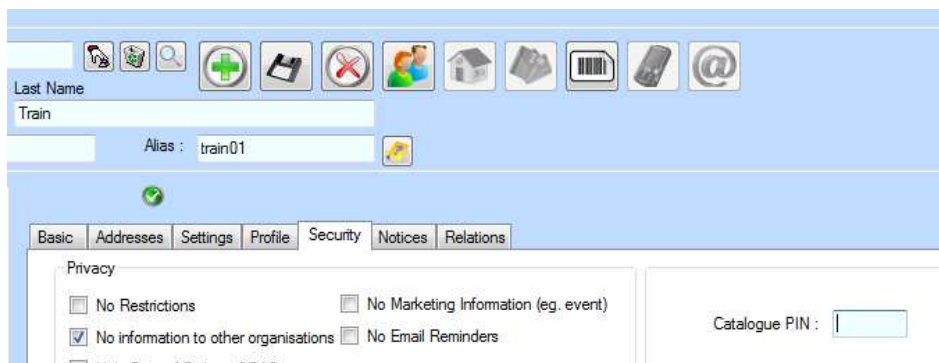
2. Click on the **Security** tab – this allows the operator to assign and change the PIN number.



- The **Catalogue PIN** area will be blank.

Basic	Addresses	Settings	Profile	Security	Notices	Relations
Privacy						Catalogue PIN : <input type="text"/>
<input checked="" type="checkbox"/> No Restrictions	<input type="checkbox"/> No Marketing Information (eg. event)					
<input type="checkbox"/> No information to other organisations	<input type="checkbox"/> No Email Reminders					
<input type="checkbox"/> Hide Date of Birth on OPAC						

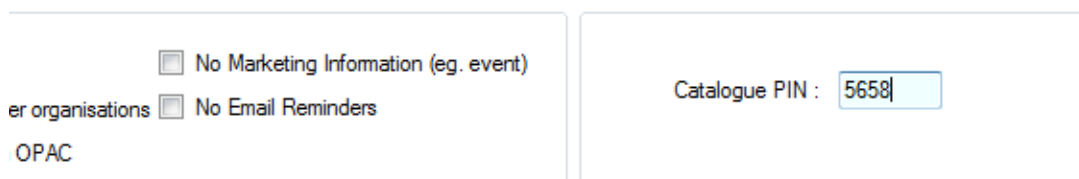
3. In the **Catalogue PIN** entry box type a 4 digit number.



- Your member may choose their own PIN if they wish or you may allocate a random combination of numbers.
 - Do not disclose this number to anyone other than the holder of the library card unless they have given their express permission.
4. Once your member is happy with the chosen combination click on the **Save** icon.



5. Note – this is the **Save only the user's Password and PIN** icon within the Security tab and not the Save the user details icon within the main User details screen
6. **Changing an existing PIN.** If your user wishes to change their PIN clear the existing number and enter a new 4 digit combination in the **Catalogue PIN** entry box.



7. Click on the **Save** icon, i.e. *the Save only the user's Password and PIN icon within the Security tab*



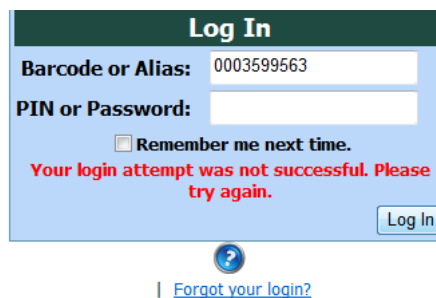
Note: if you receive the **Save Failed** warning click on OK.





- Return to the Basic tab and check both the **Registration Period** and **Membership Acceptance** fields for valid dates. Run through the steps again to assign and save the PIN.

Locked Accounts:

If a user attempts to login to the online catalogue using an incorrect PIN their account will be locked and an operator will need to clear this block.



 You are about to reach the maximum number of attempts to login in this session. Your account will lock if the next attempt is unsuccessful.

 You have exceeded the maximum number of attempts allowed to login. Your account has been temporarily locked. If you believe this was not done by you please contact the library to report it and unlock your account.

- At the **Security** tab click on the **Clearance** icon.



- When prompted click on **Yes** to proceed with the clearance.



- Click on **OK** to complete the clearance.



- At this point you may wish to confirm or change the existing PIN for your user.