

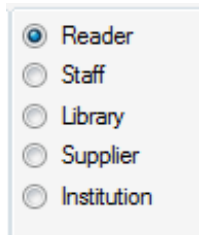
Rural Libraries Queensland

your local library network

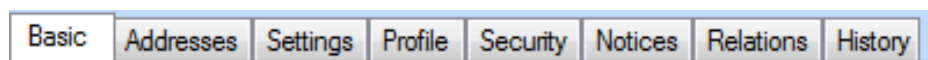
Users – additions and updates

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. Tasks covered are:

- Adding a new user record, pp.2-3.
- Re-registering expired borrowers, p.4.
- Adding a PIN to an existing user's record, pp.5-6.
- Replacing lost cards or changing barcode numbers, p.7.
- Online membership, p.7.
- Upgrading an online member to full membership, p.7.
- Locked accounts, p.8
- Deleting user records, p.9.
- Expired borrowers report, p.10.



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 for RLQ libraries*
- **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 for RLQ.
- Assign next user barcode to this user. Not used for RLQ.
- Save an SMS message to be sent to this user.
- 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 you 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.
Note: this save button within the Security tab will save the user's password and PIN, not the whole record.

Relations tab – use if your library maintains User relationships.

- Once all details have been completed click on the main **Save** icon to save the user record.



- 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

User number: _____
 User Barcode: 0000149866
 Staff Test-User
 Wynnum Road
 Registered from: 3/07/2012
 Registered to: 19/09/2012

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.

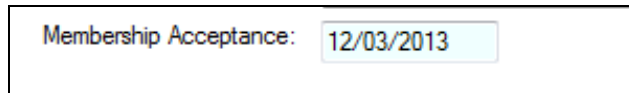
Registration Period: 3/07/2012 - 19/09/2012
 Mobile Phone No: _____
 Email Address: pls@sla.ald.gov.au

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

3. Allocating and changing PIN details for existing users

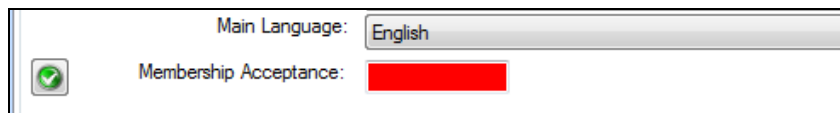
The **User Details** screen displays the summary of user details, with specific tabs used for different data elements.

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



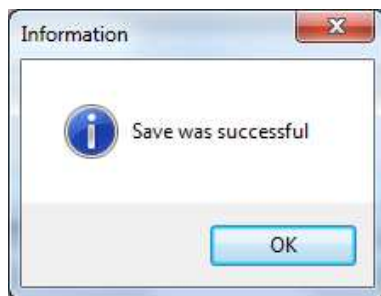
Membership Acceptance: 12/03/2013

- If the field is shaded red click on the activation icon.



Main Language: English
Membership Acceptance: [Red shaded field]

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

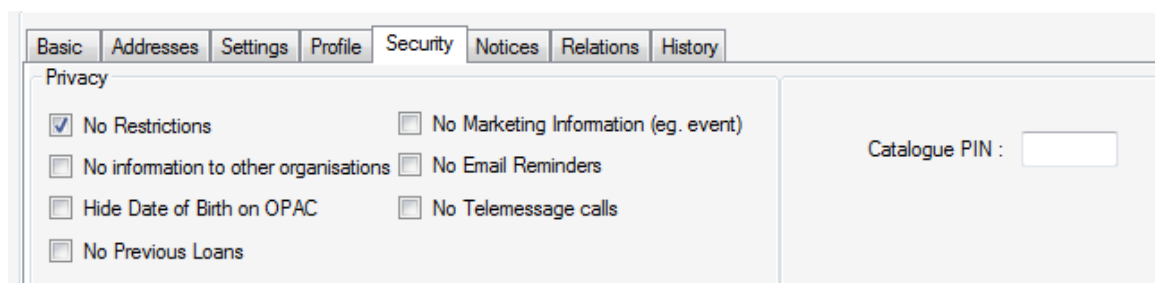


- Click on the **Security** tab – this allows the operator to assign and change the PIN number.



Basic Addresses Settings Profile Security Notices Relations History

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



Basic Addresses Settings Profile Security Notices Relations History

Privacy

No Restrictions No Marketing Information (eg. event)
 No information to other organisations No Email Reminders
 Hide Date of Birth on OPAC No Telemessage calls
 No Previous Loans

Catalogue PIN : [Blank field]

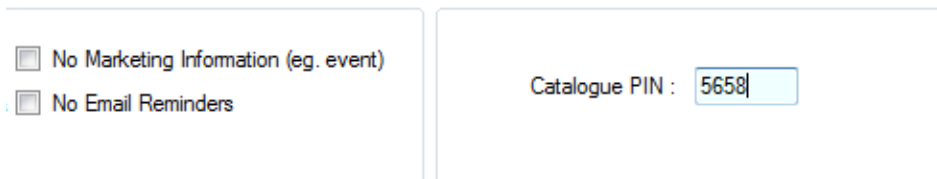
- In the **Catalogue PIN** entry box type a 4 digit number.

Catalogue PIN :

- Your member may choose their own PIN if they wish or you may allocate a random combination of numbers.
 - Avoid using the last 4 digits of the user barcode – in the event of a lost card this poses a security risk for your member’s account.
 - Do not disclose this number to anyone other than the holder of the library card unless they have given their express permission.
- Once your member is happy with the chosen combination click on the **Save** icon.



- *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*
- **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.



- 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.

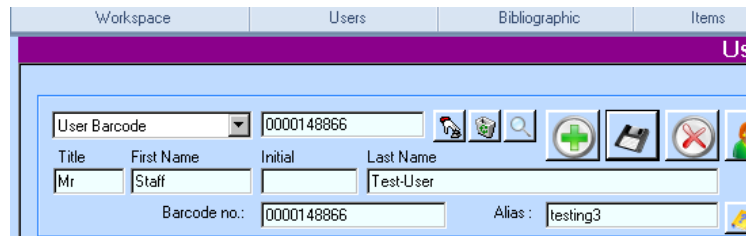
- Return to the Basic tab and check both the **Registration Period** and **Membership Acceptance** fields for valid dates.




4. Replacing lost cards or changing barcode numbers

For users needing a replacement card or a new barcode number go to their **User Details (F7)**.

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



The screenshot shows a software interface with a purple header and a light blue background. At the top, there are tabs for 'Workspace', 'Users', 'Bibliographic', and 'Items'. Below the tabs, there is a 'User Barcode' dropdown menu set to '0000148866'. To the right of this are several icons: a magnifying glass, a plus sign, a floppy disk, and a minus sign. Below these icons is a table with columns for 'Title', 'First Name', 'Initial', and 'Last Name'. The 'Title' field contains 'Mr', 'First Name' contains 'Staff', 'Initial' is empty, and 'Last Name' contains 'Test-User'. At the bottom of the form, there is a 'Barcode no.' field containing '0000148866' and an 'Alias' field containing 'testing3'.

- Click on the **Save** icon to update the details. 
- Give the user the new card and let them know their PIN.

5. Online membership

When a person joins RLQ online they are issued with a system generated number with their PIN using the last 4 digits of their phone number.

PLD staff will complete the following actions:

- review each application & confirm the home library.
- change the user status from Review to Normal and save.
- change Home Library to reflect postcode or residential address.
- send email to customer confirming they are now registered.

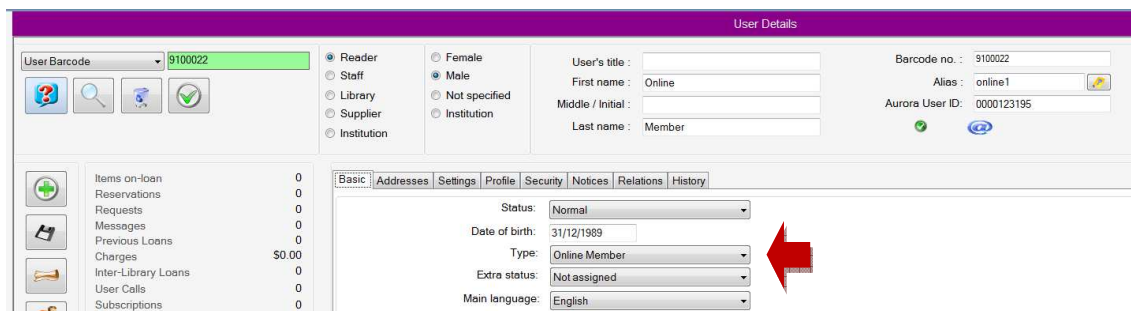
Online membership is renewable after 2 years

6. Upgrading an online member to full membership

An online member may present at the library to upgrade their membership so they can borrow materials directly from the library.

Steps required by you:


- Verify identification.
- Verify contact details including email address and phone number.
- Change User Type from Online Member to e.g. Adult Resident.
- Change barcode to reflect the barcode on the membership card.
- Issue card & verify PIN.
- Welcome new user with guide to using the catalogue and services provided by the library.




The screenshot shows a 'User Details' form with a purple header. On the left, there is a 'User Barcode' dropdown set to '9100022' and a list of statistics: Items on-loan (0), Reservations (0), Requests (0), Messages (0), Previous Loans (0), Charges (\$0.00), Inter-Library Loans (0), User Calls (0), and Subscriptions (0). In the center, there are radio buttons for 'Reader', 'Staff', 'Library', 'Supplier', and 'Institution', with 'Reader' selected. To the right, there are fields for 'User's title', 'First name' (Online), 'Middle / Initial', and 'Last name' (Member). Further right, there are fields for 'Barcode no.' (9100022), 'Alias' (online1), and 'Aurora User ID' (0000123195). Below these fields are tabs for 'Basic', 'Addresses', 'Settings', 'Profile', 'Security', 'Notices', 'Relations', and 'History'. The 'Basic' tab is active, showing 'Status' (Normal), 'Date of birth' (31/12/1989), 'Type' (Online Member), 'Extra status' (Not assigned), and 'Main language' (English). A red arrow points to the 'Type' dropdown menu.

- 7. **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.

 | [Forgot your login?](#)

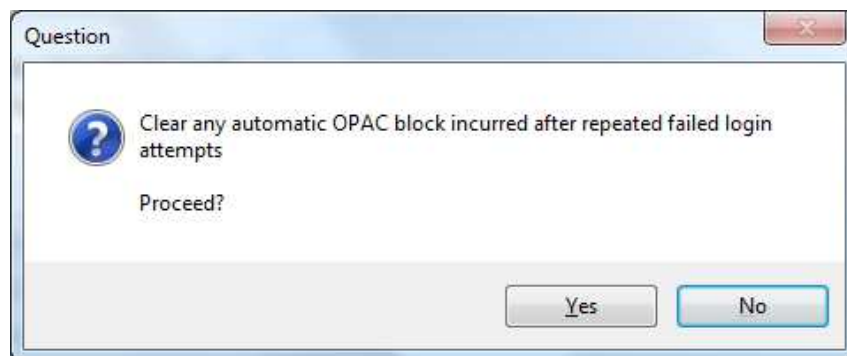
 You are about to reach the maximum number of attempts to login in this session. Your account will lock if the next attempt is unsuccessful.

 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.

- In **User Details**, 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.

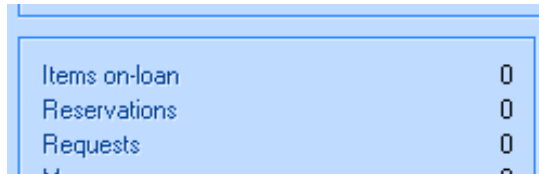


8. Deleting user records

For users records that are to be deleted go to **User Details (F7)**.

Actions required:

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

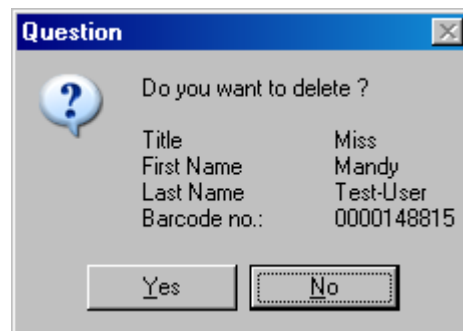


Items on-loan	0
Reservations	0
Requests	0
...	0

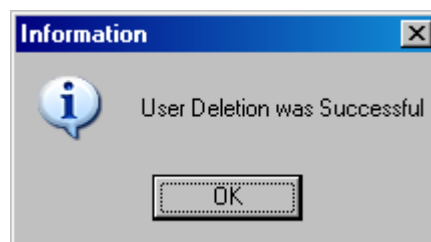
- Click on the **Delete** icon



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



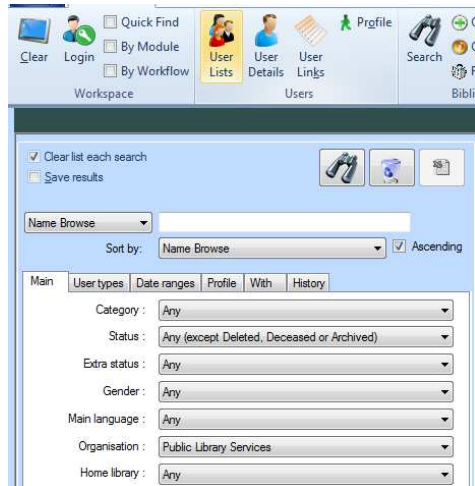
- Click on **OK** on a successful deletion.




9. Expired borrowers report

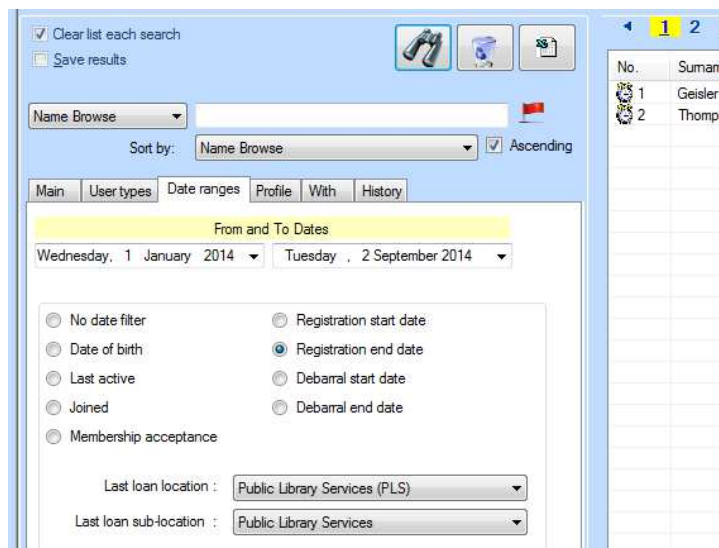
Every six months, run a list of expired borrowers for your library and delete or renew their records to ensure your membership records are up-to-date.

Go to **User Lists**



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 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.