

Users

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This chapter explains how to manage users. It is organised according to the options in the **Users** section, and the specific list and tabs used in each option. First, a general overview of the options in the **Users** section is given.

Next, the **Users** option is explained. This includes the **Users** list, which is a list of the users that have been entered in the system, and the user notebook which contains all the information and definitions pertaining to a single user. This section includes instructions on adding a new user; updating a user's details; deleting a user from the system; ascribing a user to a group; ordering an item for a user; and linking digital objects or external links to a user.

The third part explains the concept of **User Groups** and shows how to create, edit and delete user groups, and how to add and remove users from these groups.

The **Branch Details** part deals with managing different branches of the library. Afterwards, directions on producing and printing user barcode stickers using the **User Barcode** option are presented.

The chapter concludes with instructions on defining the types of payments that are used to charge the user for services and fines in the **Payment Types** option, and details about registering the deposit of payments made by the users using the **Deposits** option.

Users Section Overview

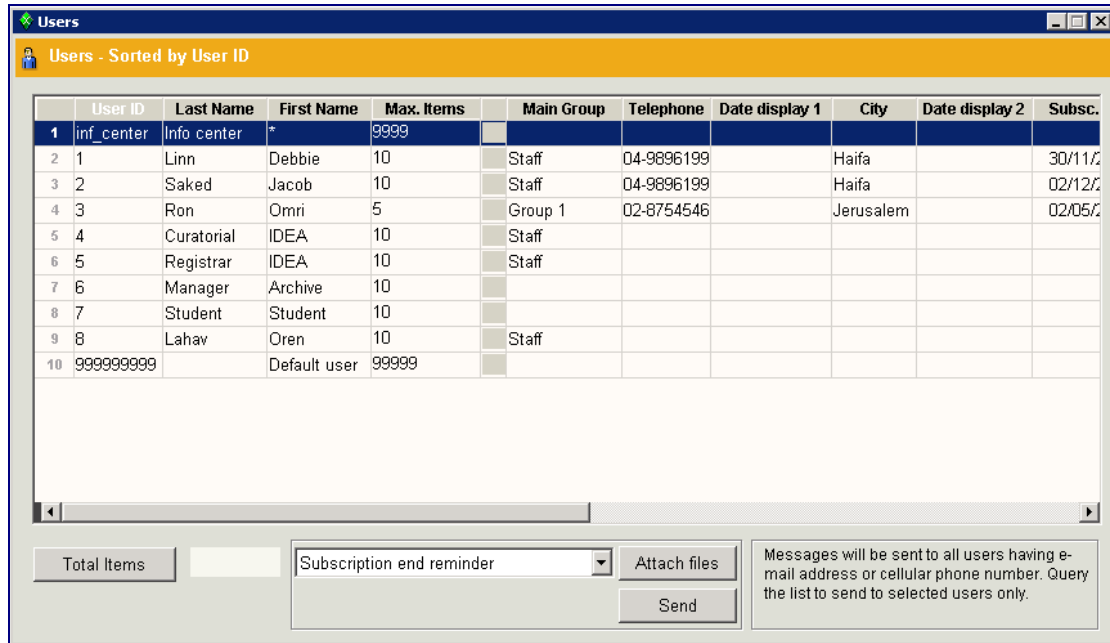
The following options are available in the **Users** section:

Users	Manage the Users list; add and delete users; update a user's notebook; manage a user's loans and orders; ascribe users to groups, manage digital objects connected to the user, send e-mail and SMS messages to a user.
User Groups	Define user groups and distribution lists.
Organizations	Manage branches of the library. Includes enabling loans and returns in different branches and tracking of loans' histories.
User Barcode	Prepare and print a file with user barcode numbers.
Import User Data	Import users lists from external software according to a defined format. Define default options, and transfer users between groups.
Payment Types	Define types of payments, such as subscriptions and late fees.
Deposits	Manage and track deposits of payments made by users.

Users

The **Users** option serves for managing users. This includes adding and deleting users from the library's users list; updating information about the user; managing the user's loans and orders; ascribing users to groups, managing digital objects connected to the user, and sending e-mail and SMS messages to the user.

When the **Users** option is selected from the **Users** section, the **Users** list is displayed:




	User ID	Last Name	First Name	Max. Items	Main Group	Telephone	Date display 1	City	Date display 2	Subsc.
1	inf_center	Info center	*	9999						
2	1	Linn	Debbie	10	Staff	04-9896199		Haifa		30/11/2
3	2	Saked	Jacob	10	Staff	04-9896199		Haifa		02/12/2
4	3	Ron	Omri	5	Group 1	02-8754546		Jerusalem		02/05/2
5	4	Curatorial	IDEA	10	Staff					
6	5	Registrar	IDEA	10	Staff					
7	6	Manager	Archive	10						
8	7	Student	Student	10						
9	8	Lahav	Oren	10	Staff					
10	999999999		Default user	99999						

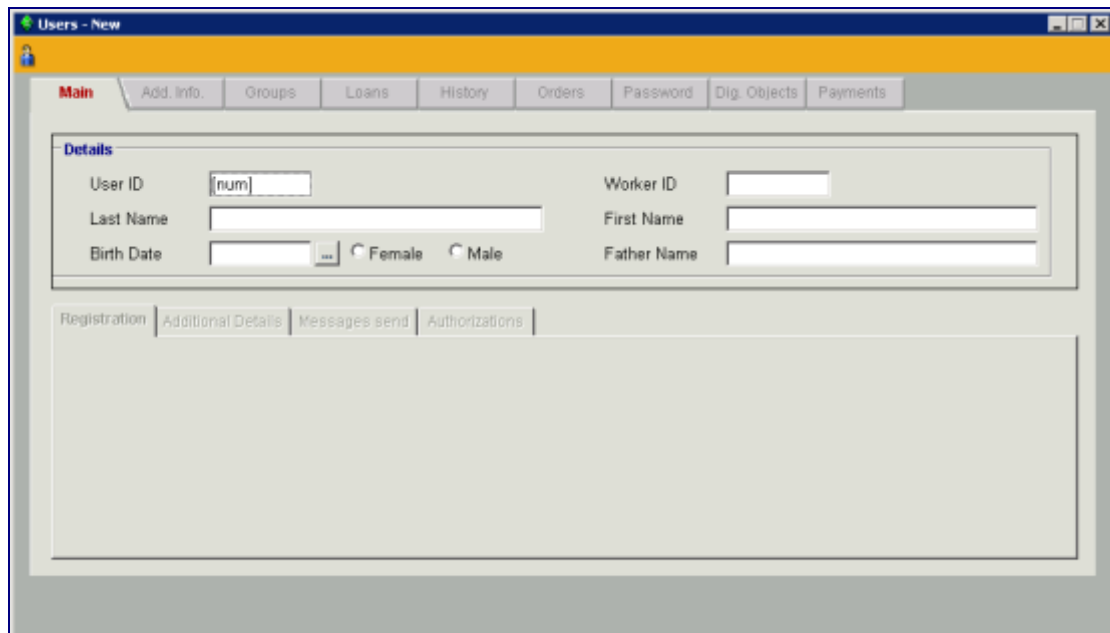
The **Users** list is a list of the users that have been entered in the system.

Note: Any staff user can define the display of the list. This definition will be kept, and will be used the next time the system is accessed with the same password. See the **Introduction** chapter for details on tailoring the display of the list's columns.

Adding a New User


Select the **Users** section from the main menu. Select the **Users** option from the

Users menu. The **Users** list will be displayed. Select the **Insert** icon  from the secondary toolbar. The **Users – New** window will be displayed with an empty user notebook. The user notebook is the term used for all the information about the user that is entered in the tabs in the **Users- New** window and the **Users** window.



The user notebook is comprised of tabs. The active tab's title is highlighted. When adding a new user, the user notebook opens in the **Main** tab.


Fill in the new user's details in the upper section of the **Main** tab and save by

selecting the **Save** icon  from the secondary toolbar or by typing **Ctrl + S**. The **Users- Add** window will be renamed to **Users – Edit**, and all the tabs in the user notebook will become active (not grayed out). Fill in additional user details and save. When finished, close the **Users – Edit** window. The **Users** list window will be displayed, including the new user.

Note: New users can also be imported into the system from external files. See the **Import User Data** chapter for complete details.

Updating User Details


Select the user from the **Users List** by double clicking on the user's name or by

highlighting it and selecting the **Update** icon  from the secondary toolbar.

The user's notebook will be displayed, with the **Main** tab as the active tab. Enter the desired changes in any of the tabs and save.

Note: The user ID is a unique number. User IDs can only be changed with a special permission from IDEA@ALM.

Deleting a User from the Users List

Highlight the user to be deleted. Select the **Delete** icon  from the secondary toolbar. You will be prompted whether you really want to delete the user. Select **Yes**. The user will be removed from the **Users list**.

Details Tab

When adding a new user or updating an existing user, the user notebook opens in the **Main** tab, which contains general information about the user. The tab is comprised of two sections: the **Main** tab and lower tabs. The lower tabs are not initially active when a new user is added, but become active once the new user's name and ID number are saved.

Main Tab

This window includes the user's unique ID number and general information such as the user's name and date of birth.

The **User ID** field is used to determine a unique user ID number. The field's default value is [num]. This value is used to automatically allocate a user ID number by the system. It is recommended to use this allocation method by leaving this value [num] intact. The number will be allocated upon saving the user. To ascribe a number manually, highlight the value [num] and type or scan the desired number.

Registration Subtab

This tab is used to determine user definitions such as subscription dates and the maximum number of items that the user can loan. Note that the **Registration Date** field is automatically filled when the new user notebook is created.

Additional Details Subtab

This tab includes additional user information such as address and phone numbers. It also includes a **Note** field. If information is entered in the **Note** field a warning triangle with an exclamation mark will appear when this user borrows items.

Messages Send Subtab

This tab is used to determine definitions for e-mail and SMS correspondence with the user. The definitions include **E-mail** and **SMS** checkboxes for determining whether each of these communication modes will be used, and fields for defining the correspondence language, e-mail address and mobile phone number.

Note: The content of e-mail and SMS messages is defined in the **Administration** section's **E-mail Management** option.

Authorizations Subtab

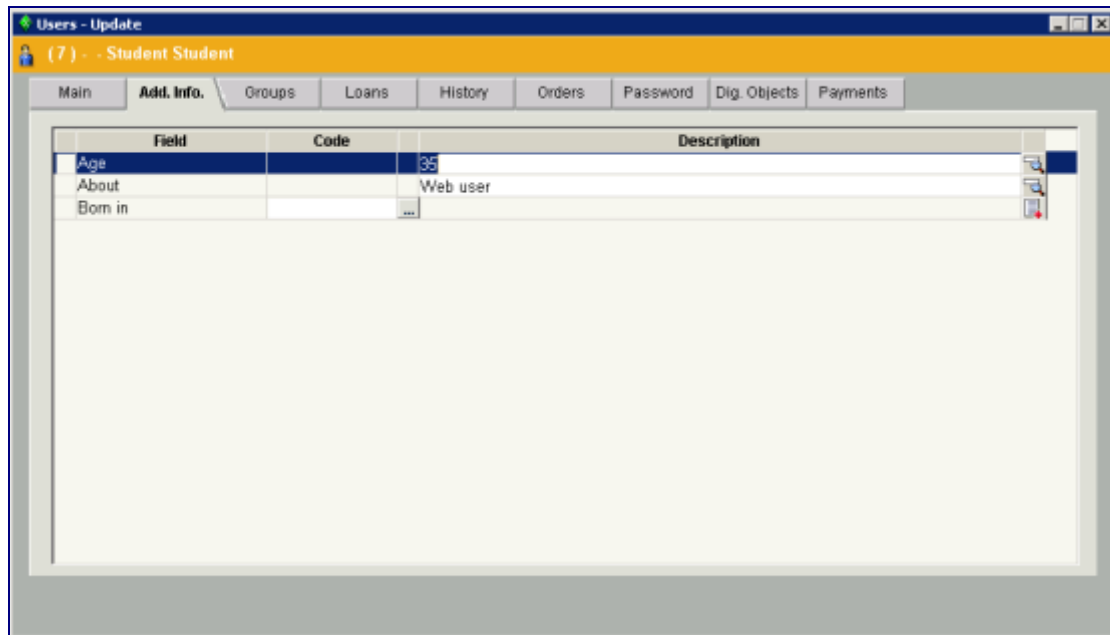
This tab is used to define whether the user has permission to extend loans through the Internet.

Add. Info. Tab

The **Add. Info.** tab is used to add additional fields to the user notebook. The additional fields are dynamic fields and can be determined by the system administrator according to the institution's needs.

The tab displays all the fields the system administrator added as additional fields. For each field, fill in the relevant details for the specific user.

In the example below, three additional fields were added to the user notebook: Born in, Age and About.

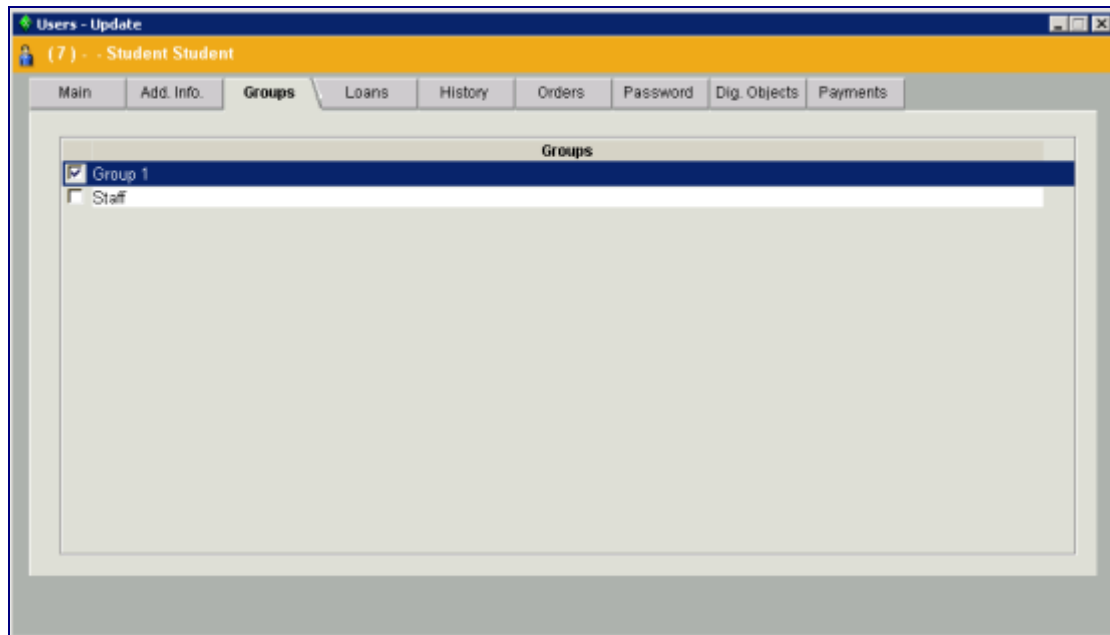


Notes:

1. The fields that will be displayed in the **Add. Info** tab are determined in **Administration / Template / template type User Extension / Input Fields** tab / **General** subtab. See the **Administration** chapter for more details. Fields added to the **User Extension** template will automatically appear in the user notebook, in the **Add. Info** tab.
2. **Add. Info.** fields can be duplicated. From within the **Add. Info** tab, insert a new line and select the field from the list that will be displayed. Only fields that were defined in the **User Extension** template will be available in this field list.

Groups Tab

User groups facilitate group loans of copies to all group members and the use of circulation lists for items. The **Groups** tab is used to ascribe the user to one or more groups and displays the list of groups that the user belongs to. Initially, the list is empty.




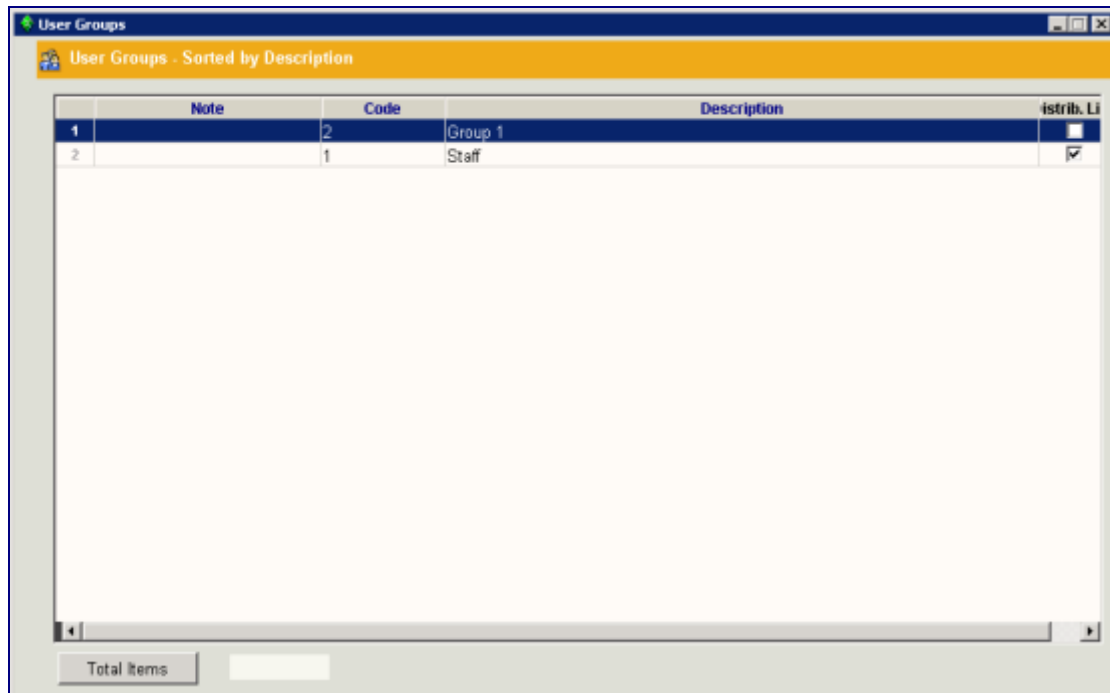
When a user is ascribed to more than one group, one of the groups must be defined as the main group.

The group checked with the check mark is the users main group.

See the **User Groups** section below for details about defining user groups.

Ascribing the User to a Users Group

From the **Groups** tab select the **Insert Row** icon  from the secondary toolbar. The **User Groups** window will be displayed.



Select an existing group or add a new one and then click **Select**.

Loans Tab

The **Loans** tab is only used for displaying information. It displays the list of items that are currently borrowed by the User. The same information is also displayed in the **Loans** tab, in the **Circulation** module. Items that are overdue will be marked in red.

In order to display complete information about an item from the list, highlight the item

and click the **Display Item** icon . The item's notebook will be displayed.

Note that item details cannot be updated from the **Loans** tab. They can only be updated from the **Cataloging** module.

History Tab

The **History** tab is only used for displaying information. It displays details about the user's borrowing history, including borrowing dates; expected return dates; actual return dates including late days for each item; a summary of all the late days; and notes to loans.


Note: Systems using the information services module, where automatic mail notes are sent to the users, will find the number of the note sent to the user in the **Reference** column. Click on the number to display the content of the note.

Orders Tab

The **Orders** tab is used to place and view the user's orders. The tab is divided into two frames. The upper frame, **Ordered Items**, lists the items that have been ordered

by the user. The lower frame, **Waiting for Item**, lists additional users that are waiting for the item that is highlighted in the **Ordered Items** frame.


Ordering an Item

From the **Orders** tab select the **Insert Row** icon  from the secondary toolbar. The **Items** window will be displayed. Select an item by double clicking on it or by clicking on it and selecting **Choose**. Note that a query can be performed to quickly locate an item in the list by selecting the **Query** button and using the **Query** form that is displayed.

The item will be displayed in the **Ordered Items** list in the **Orders** tab.

Canceling an Order

From the **Orders** tab, highlight on the **Ordered Items** list the item whose order is to

be canceled. Select the **Delete Row** icon  from the secondary toolbar. The item will be deleted, thus canceling the order.

Notes:

1. Items can also be ordered from the **Circulation**, **Search** and **Cataloging** modules.
2. Once an ordered item is loaned, it is automatically deleted from the **Ordered Items** list.

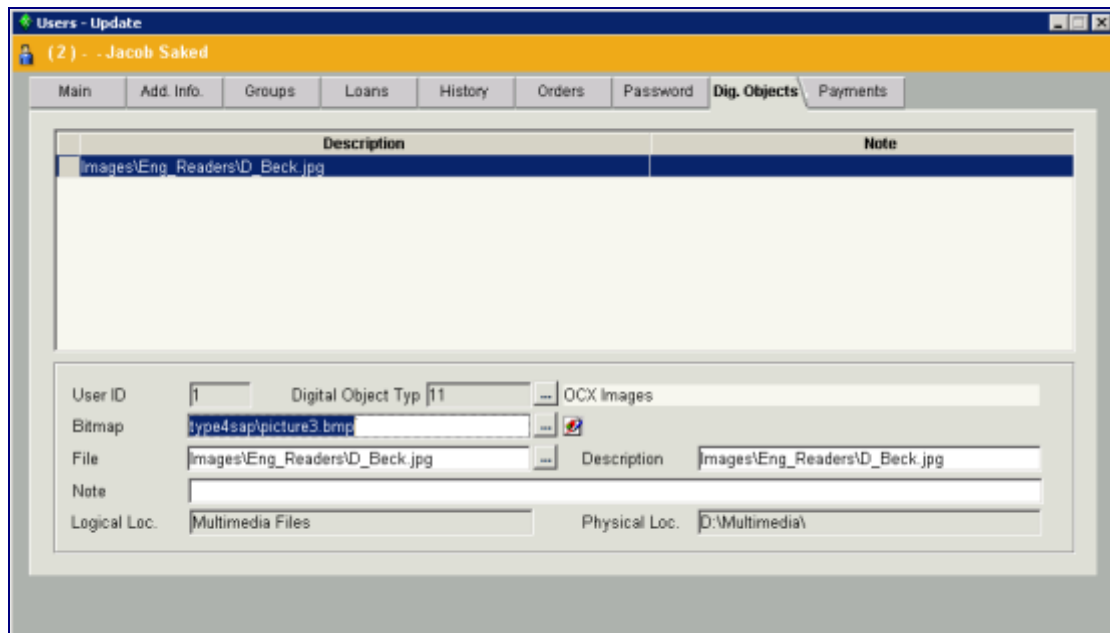
Password Tab

The **Password** tab is used for defining the user's authorization password for the Web interface. The password can include digits and letters. Only English letters can be used.

Enter the password and save.




Dig. Objects Tab

The **Dig. Objects** tab is used to link digital objects or external links to the user. In addition to adding the user's photograph to the user notebook, this is helpful for adding additional information about users such as their websites, blogs, works of art or newspaper clippings.




Linking Digital Object Files or External Links to a User


From the **Dig. Objects** tab, select the **Insert Row** icon  from the secondary toolbar. The digital object fields will be displayed on the bottom part of the screen. Fill in the fields and save.

User ID	This field is automatically filled in by the system.
Digital Object type	<p>The type of digital object file or external link that will be linked to the User. Click the table  button. The Digital Objects table will be displayed. Select the desired digital object type by double clicking on it or by highlighting it and clicking Select, or configure a new digital object type by selecting Add and filling in the digital object add form that is displayed.</p> <p>Note: New digital object types can also be configured in two places in the Cataloging section: from the item notebook's Dig. Assets tab, or by selecting the Digital Assets option from the Cataloging menu.</p>
Bitmap	<p>The icon that will be displayed for the digital object file or internet site. The field is automatically filled in when the Digital Object Type field is filled in.</p> <p>To change the field's value, click the table  button. The Select Icon table will be displayed. Select the desired icon by double clicking on it or by highlighting it and selecting OK.</p>
File	<p>The digital object file or external link that will be linked to the item. For files, click the  button. The Select File window will be displayed. Locate and then select the desired file by double clicking on it or by highlighting it and selecting Open.</p> <p>For internet addresses and other external links, type, or copy</p>

	and paste, the address into the field. It is possible to open the linked file or internet site by double clicking on the File field.
Description	Free text. When this field is left empty, the name of the linked file will be listed here.
Note	Free text.
Logical Location	These fields are automatically filled in based on the configurations of the digital object links (see explanation below).
Physical Location	

It is possible to link an unlimited number of different / identical digital object files or external links to a User, by inserting additional lines in the **Dig. Objects** tab. (As

described above, for each new digital object link select the **Insert Row** icon  from the secondary toolbar. The digital object fields will be displayed. Fill in the fields and save.)

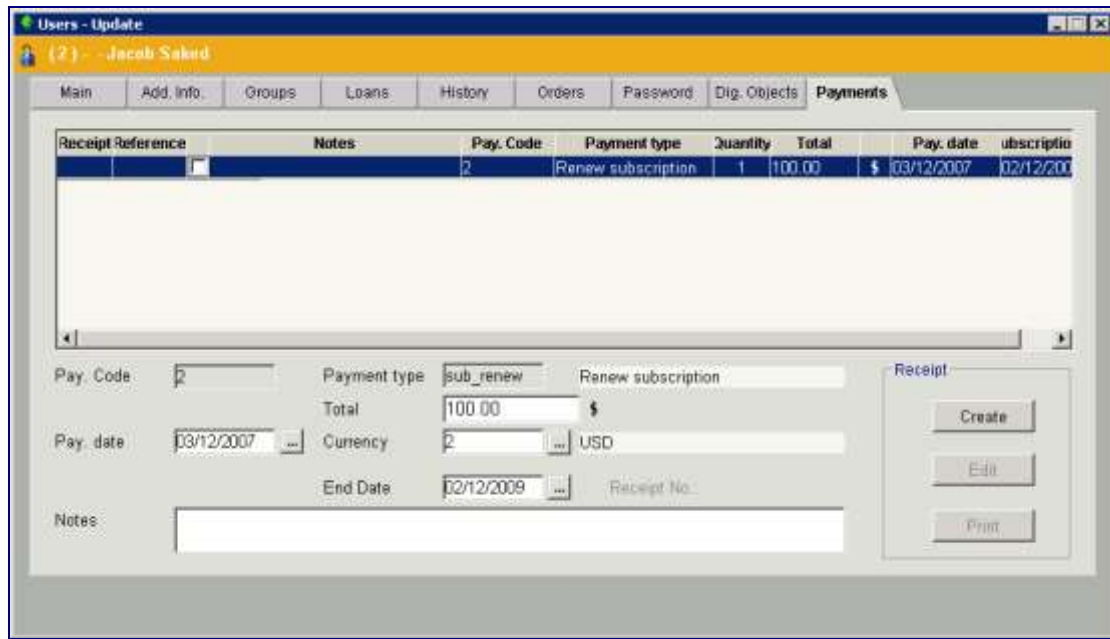
It is also possible to simultaneously link a number of files to the User. Click the  button next to the **File** field. The **Select File** window will be displayed. Locate the desired files, highlight them using the **Ctrl+Shift** keys and select **Open**.

Changing the Order of Digital Object Links

Change the order of the digital object links in the **Dig. Objects** tab by dragging them. Afterwards, save.

Payments Tab

The **Payments** tab is used to manage the users' payments such as deposits, new registration fees, registration renewal and use of payed services (printing, photocopies, translation, etc.).




The tab is divided into three parts:

The **Payment List** at the top of the tab lists all of the user's payments. The details of the highlighted line in the **Payment List** are displayed and updated in the bottom part of the screen. The **Receipt** area at the bottom right is used to create, edit and print receipts.

Note: Payment types are added and edited using the **Payment Types** option from the **Users** module's main menu.

Adding a New Payment

From the **Payments** tab, select the **Insert Row** icon  from the secondary toolbar. The **Payment Types** window will be displayed. Select a payment type by double clicking on it or by clicking on it and selecting **Choose**.

A new payment line will be added in the upper part of the screen, and the details will be displayed in the lower part. The system automatically assigns a code for the specific payment in the **Pay Code** field and fills in the **Payment Type** field, and these fields cannot be changed. The **Pay Code** field is generated by an internal numerator.

The **Total**, **Pay Date** and **Currency** fields are filled in according to the payment type and may be changed. Save the payment.

Note : When adding a new payment for the user, a final date will automatically be entered for the payment if a payment period was defined for the payment type. For example, the payment types **New Subscription** and **Renew Subscription** automatically define the date when the user's subscription ends.

Creating and Printing Payment Receipts for Users

Receipts can only be created if all the payments in the **Payments** tab have been saved. Mark the checkboxes of the payment lines that will be included in the receipt. Select the **Create** button. The **Receipt Payments** window will be displayed. Complete the form by entering the amount in the **Total** field. Note that you can insert additional lines with different payment types. Select **Save**. The receipt will be saved. Select **Exit** to exit the form.

As long as the receipt has not been printed, the details can be reedited, by selecting the **Edit** button.

Select **Print** to print the receipt. The **Print** window will be displayed. Select **OK**. The receipt will be printed. The receipt includes all the payment lines, and a receipt number that is added by the system when a receipt is printed. For each payment line, the receipt number is displayed in the bottom part of the screen and the line is marked as having a receipt in the **Receipt** column.

In order to print a copy of the receipt, highlight a line for which the receipt was already printed, and select **Print**.

Sending Messages and Reminders by E-Mail and SMS

Automatic reminders and general announcements prepared by the library can be sent to users from the **Users** list.

Prepare the relevant user list using a query, or a composed search. Select the message from the message list at the bottom of the **Users** list window. Select **Attach Files** and choose files from the list in order to attach additional files to the e-mail message. Select **Send**. A dialogue box, showing the name of the message to be sent; the number of recipients in the list; and the sender's address that will be used, will be displayed. Select **OK**. The message will be sent to all the users in the list by e-mail, SMS, or both, according to the definitions in the user notebook, or according to the general definition in the configuration file.


See the **Maintenance** chapter for additional information about sending messages by e-mail and by SMS.

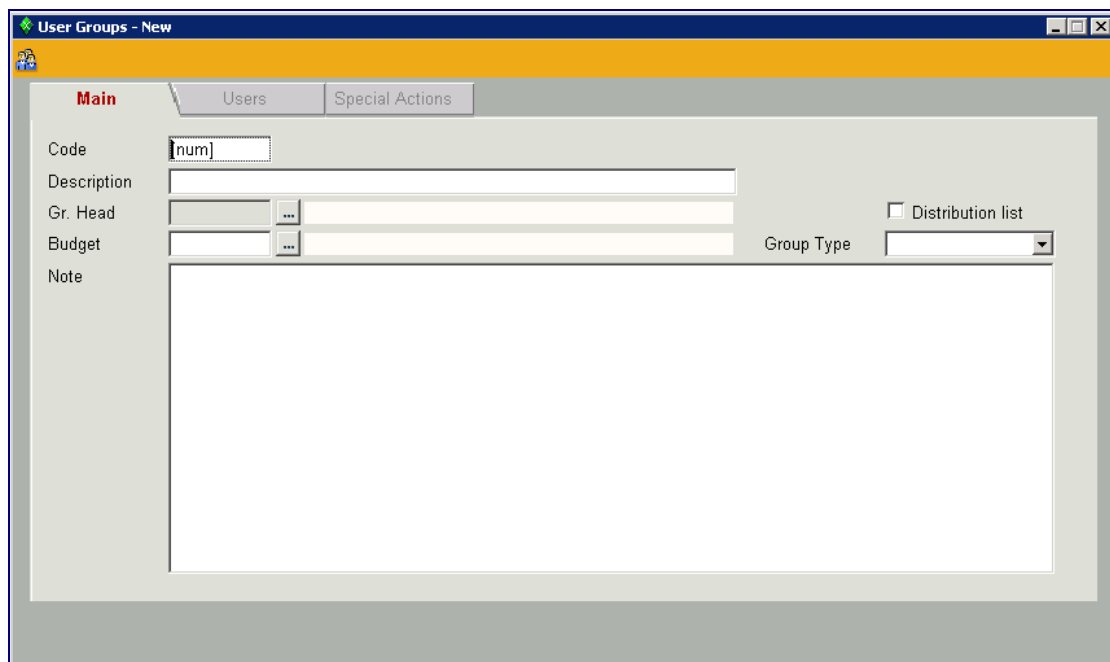
Users Groups

User groups are used to perform group loans of copies to all group members and to support the use of circulation lists for items. The user groups are defined from the **Users Groups** window which is accessed from the **Users Groups** option in the **Users** section. Users are ascribed to one or more groups either from the **Users Groups** window, or from the **Groups** tab in the user notebook, which is accessed by the **Users** option in the **Users** section.

Adding a New Users Group


Select the **Users** section from the main menu. Select the **Users Groups** option from the **Users** menu. The **Users Groups** list will be displayed, listing all the groups that have already been defined.

Select the **Insert** icon  from the secondary toolbar. The **Users Groups – New** window will be displayed with an empty users group notebook and the **General** tab as the active tab.




Fill in the fields, as described below and save.

Updating a Users Group

Select the users group from the **Users Groups** list by double clicking on the group's name or by highlighting it and selecting the **Update** icon  from the secondary toolbar.

The users group notebook will be displayed, with the **General** tab as the active tab. Enter the desired changes in any of the tabs and save.

Deleting a Users Group from the Users Groups List


Highlight the users group to be deleted. Select the **Delete** icon  from the secondary toolbar. You will be prompted if you really want to delete the users group. Select **Yes**. The users group will be removed from the **Users Groups** list.

Note: Deleting a group from the **User Groups** list, does not delete the users belonging to that group, but only deletes the group from the users. Deleting users is performed only from the **Users** list.

Main Tab

When adding a new users group or updating an existing users group, the users group notebook opens in the **Main** tab, which contains general information about the users group.

The **Code** field is a unique users group ID. The field's default value is *[num]*. This value is used to automatically allocate a users group ID number by the system. If you prefer to manually ascribe a descriptive alphanumeric code, highlight the value *[num]* and type or scan the desired code. The code will be allocated upon saving the item. The **Description** field is a free text field used for the name of the users group.


The **Gr. Head** field determines the person who can authorize requests and send messages and letters to the users in the users group. This field is usually used in information centers. Select the group head by clicking the  button and selecting from the **Users** list.

The **Budget** field defines the default budget that will be billed when requests from the users in the users group are fulfilled.


The **Group Type** field is used to define the hierarchy of the users group. For example, a wing is higher than a section. This field is usually used in information centers.

If the users group also serves as a distribution list for a periodical, mark the **Distribution List** checkbox. (See the **Cataloging a New Periodical** section of the **Cataloging** chapter for details about connecting an item to a distribution list.)

Users Tab

This tab is used to connect users to the users group. It lists all the users in the users group. In order to display full information about a user highlight the user and select the **Display User** icon  from the secondary toolbar.

Ascribing a User to the Users Group

From the **Users** tab select the **Insert Row** icon  from the secondary toolbar. The **Users** window will be displayed.

Add a user to the users group by highlighting and selecting **Choose**. In order to add a number of users to the users group, mark the **Choose Group** checkbox. An additional users list will be opened on the lower part of the screen. Highlight a user and select the down arrow. The user will appear on both the upper window and the lower window. Repeat for all the users that are to be added to the users group and click **Select**.

Note: A new user can be entered into the system with minimal information and added to the users group by selecting **Add** from the **Users** window.

Deleting a User from the Users Group

From the **Users** tab, highlight the user to be deleted from the users group and select



the **Delete Row** icon from the secondary toolbar. You will be prompted if you really want to delete the user from the users group. Select **Yes**. The user will be removed from the users group.

Special Actions Tab

This tab is used to determine the order of the users in a distribution list. It is only operational if the group has been defined as a distribution list, by marking the **Distribution List** checkbox in the **General** tab.

In order change the order in the list, highlight a user and click the location in the column **Location in List**.

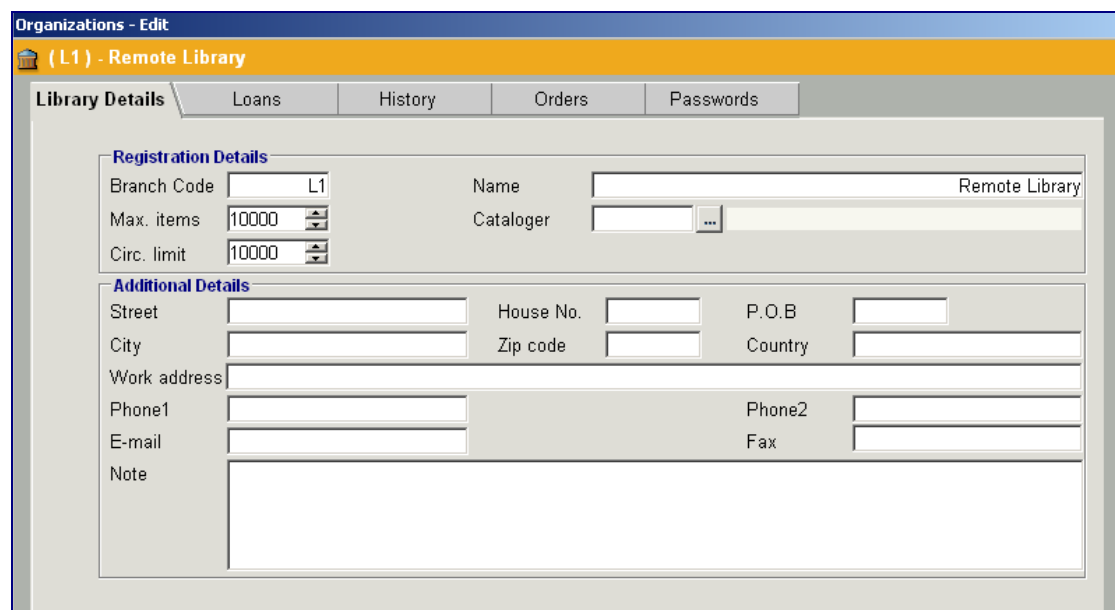
Organizations

The **Organizations** option is used to manage the branches of the library. Branches are managed through the branches notebook, the same way users are managed through the User's notebook, including details, loans, history, orders and passwords.

Select the **Users** section from the main menu. Select the **Organizations** option from the **Users** menu. The list of affiliated branches will be displayed.



In order to define a new branch, Select the **Insert** icon from the secondary toolbar. The **Library Details** window will be displayed.



The screenshot shows the 'Organizations - Edit' window with the 'Library Details' tab selected. The window title is '(L1) - Remote Library'. The 'Library Details' tab is active, showing the following fields:

- Registration Details:**
 - Branch Code: L1
 - Max. items: 10000
 - Circ. limit: 10000
 - Name: Remote Library
 - Cataloger: [dropdown menu]
- Additional Details:**
 - Street: [text box]
 - City: [text box]
 - Work address: [text box]
 - Phone1: [text box]
 - E-mail: [text box]
 - Note: [text area]
 - House No.: [text box]
 - Zip code: [text box]
 - Phone2: [text box]
 - P.O.B: [text box]
 - Country: [text box]
 - Fax: [text box]

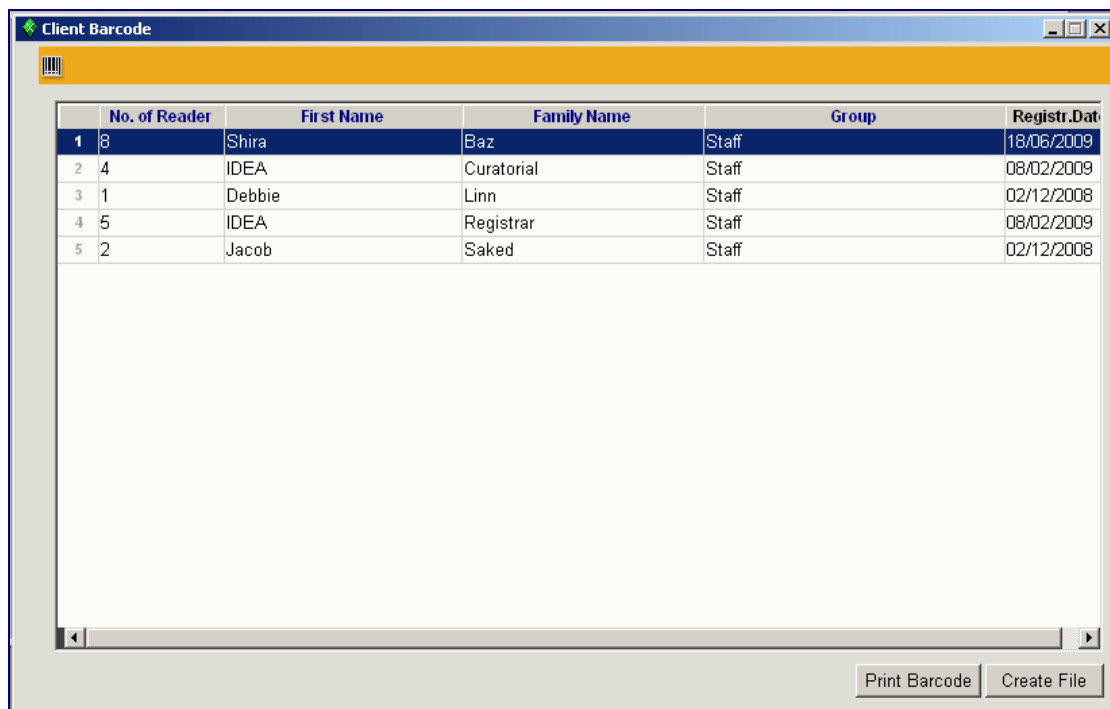
See the **Users** section above for details.

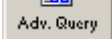
User Barcode

The **User Barcode** option is used to produce and print user barcode stickers. The process produces the users' ID numbers in barcode format. The stickers can be used for user identification. The format definitions and the printing are performed by external designated software, which is installed independently.


Printing User Barcodes

Select the **Users** section from the main menu. Select the **User Barcode** option from the **Users** menu. An empty **User Barcode** window will be displayed.



Select the **Advanced Query** icon  from the secondary menu, in order to create the list of users for which the stickers will be prepared. The **Query** window will be displayed. See the **Search** chapter for complete details about using the **Query** window for searches.

Fill in the form and select **OK**. The list of users will appear on the screen. Users can

be erased from the list by highlighting a line and selecting the **Delete** icon  from the secondary toolbar.

Select **Print** to send the list to the printer, or select **Create File** to create a file that can be printed later. The file will be saved under the name **BarcodeX.txt** (where X is the sequential number) in the folder **IDEAALM/tmp**.

Import User Data

This option is used to import user data from external files. See the **Import User Data** chapter for complete details.

Payment Types

The **Payment Types** option is used to define the types of payments that are used to charge the user for services and fines.

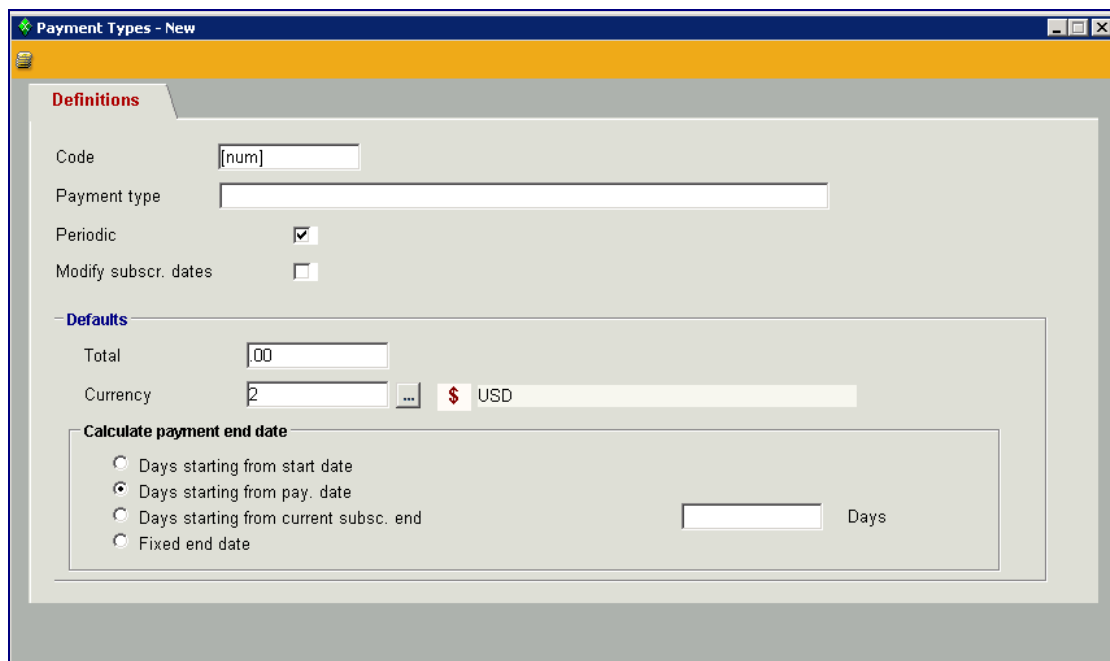
Each payment type is defined according to the type of payment (subscription renewal, deposit, new subscription, printing, etc.), and its relevant options and calculations (such as sum, currency, and period).

Creating a New Payment Type

Select the **Payment Types** option from the **Users** section on the main menu. The **Payment Types** list will be displayed.



Select the **Insert** icon from the secondary toolbar. The **Payment Types – New** window will be displayed. Fill in the fields and save.



Code (numerator)	A unique payment type ID. The field's default value is <i>[num]</i> . This value is used to automatically allocate a payment type ID number by the system. If you prefer to manually ascribe a descriptive alphanumeric code, highlight the value <i>[num]</i> and type or scan the desired code. The code will be allocated upon saving the item.
Payment	Free text. The name of the payment type.

Type	
Periodic	Select this checkbox when defining a payment type that is periodic, such as a subscription. The dates are calculated based on the method chosen from the Calculate Payment End Date menu. The dates for the calculation are taken from the Registration Date or Subscription End fields in the user notebook Main tab, or the Payment Date field in the user notebook Payments tab.
Calculate Payment End Date	This menu is only displayed when the Periodic checkbox is marked. It is used to define the calculation method for determining the end of a subscription. The options are: <ul style="list-style-type: none"> • Number of days from the starting date. • Number of days from the payment date. • Number of days from the date of the present payment end date. • A fixed final date.
Total	The default amount of the payment sum that will be used when a new payment is registered.
Currency	The default option for the currency that will be used when a new payment is registered.

Note: It is possible to mark the **Update Registration Date** option such that when a change is performed in the ending date of a periodical payment date, the registration dates will be updated accordingly.

Updating a Payment Type

Select the **Payment Types** option from the **Users** section on the main menu. The **Payment Types** list will be displayed.

Double click the line of the payment type that is to be updated. The **Payment Type** window will be displayed. Make the desired changes and save.


Deposits


The **Deposits** option is used to register the deposit of payments made by the users. When a user pays for services such as registration and photocopies, or pays a late fee, the payment is registered using the **Payments** tab in the User's notebook. The actual registering of the payment is performed when the receipt is printed from the **Payments** tab. The **Deposits** option is used to register and follow the deposit of these payments in the bank. Deposits can be followed in the different banks, according to payment dates, deposit destination, and the choice of payments included in the deposit.

The relevant details are the payment method, payment sum, value date, receipt number and the name of the paying User.

Registering a New Deposit

Select the **Users** section from the main menu. Select the **Deposits** option from the **Users** menu. The **Deposits** list will be displayed.

Select the **Insert** icon  from the secondary toolbar. The **Deposits – New** window will be displayed.

Enter the name of the bank or other deposit destination in the **Deposited to** field in the **Main** tab, by clicking the table  button. The **Deposit Destination** list will be displayed. Select a field by double clicking on it or by clicking on it and selecting **Choose**, and then save.

Note that new deposit destinations can be defined from the **Deposit Destination** list. The list can also be accessed from the **Maintenance** section's **Code Tables** option.

Select the **Payments** tab. Select the **Insert Row** icon  from the secondary toolbar. The **Choose Payments for Deposit** window will be displayed.


The window is comprised of three parts. The upper part, **Filter by Cheque Value Date** is used to arrange payments made by cheque according to the cheque dates. The middle part displays the payments that were not yet deposited. The bottom part is used to list all the payments that will be included in the current deposit.

Choose the payments that will be deposited by doubleclicking each payment line or by highlighting each payment line and pressing the down arrow. The payment line will be removed from the middle part of the screen and will be displayed on the bottom part. Select the **Select All** button to choose all the payments.

Payments can be removed from the bottom list by doubleclicking the payment line or by highlighting the payment line and pressing the up arrow. The payment line will be removed from the bottom part of the screen and will be displayed on the middle part.

After selecting all the payments that will be included in the deposit, save the **Payments for Deposit** list by selecting **OK**.

Printing New Deposit

After the **Payments for Deposit** list is saved, the deposit form can be printed. Return to the **Main** tab and click the **Deposit Form** icon  from the main toolbar. A preview window will be displayed, from which the deposit form can be printed. The word **Original** will appear on the form. After the first printing of the form, the word **Copy** will appear on any further printing.

After printing the source, the note “Deposit performed” will be displayed in the **Main** tab's **Note/Description** field. The deposit date will be listed in the **Main** tab's **Data of Deposit** field. In addition, in the **Payment** tab in the User's notebook, when the payment on which the deposit was performed is opened and the **Receipt** display is chosen, a sign will indicate that a deposit was performed for the payment.