User Groups

Definition

User Groups can be used to join 2 or more users to accomplish a number of tasks. These groups can be established with different policies, different levels of responsibility, different responsibility types and different access. User Groups are optional and each library can decide how to implement them to meet the needs of their users.

A group of users (all from the same home library) can be joined together for a number of reasons. A user can be a CHILD, an ADULT or a PARENT. The responsibility level and responsibility type will help determine which policy to select from the drop down menu when creating a group or adding a user to a group.

A responsibility level of SELF means all individuals can be in the same group BUT the delinquencies of one member do not affect any other member of the group.

A responsibility level of LINKED means all individuals can be in the same group AND the delinquency of one member affects all members of the group. As long as one member of the group has a responsibility level of LINKED, then all members of the group are affected by the delinquencies of each member.

The "User Groups" tab is available in a user record from the following wizards: Display User, Modify User and User Registration. The combination of policy, level and type will determine how the group will function.

User Groups are created in the User Registration wizard for new users and in the Modify User wizard for existing users. Begin to create a group by clicking on the User Group tab.

Group name: Each group must have its own unique name. Create the group name using your 3 Letter agency code immediately followed by the last 4 digits of the primary phone number of the group leader.

Note: User group names Guardian and Under18 have been migrated from data for Lansing PL and have policies unique to the Lansing PL.

Responsibility policy: Policies are created by SWAN and 8 policies/iterations have been created for your use. Select one from the drop down for each user in a particular group.

Responsibility level: The responsibility level of LINKED or SELF will auto fill based on the policy selected for each group member.

- LINKED is used if all patrons in the group are to be blocked when one user in the group owes more than $5.00. A responsibility level of LINKED will also cause all members of the group to be delinquent if one member of the group is delinquent.
- SELF is used if the delinquency of one has no effect on the delinquencies of other group members. Each user is responsible for his/her own delinquencies.

Responsibility type: The responsibility types of HEAD and NONE will auto fill based on the policy selected for each group member. HEAD is to be used for checkout purposes only. All checkouts for the group belong to the user with a policy type of HEAD. The limits for these checkouts are determined by the user profile. A responsibility type of NONE means each group member is responsible for individual checkouts.

Access Level: This attribute controls a group member's access to other group member's records, such as charges, holds or bills. The access level is not dependent on the level of responsibility.

- Display Charges – This option allows the user to see charges that belong to other members of the group.
- Display Holds – This option allows the user to see holds that belong to other members of the group.
- Checkout Holds – This option allows the user to checkout items on hold for other members of the group without switching to another user record. When the item is checked out to a user with this access, the hold record is considered filled.
- Remove Holds – This option allows a member of the group to remove holds for other members of the group.

- Display Bills – This option allows the user to see bills that belong to other members of the group.
- Pay Bills – This option allows the user to pay bills for other members of the group.
- Notice Master – This option allows all notices for the group to be sent to this user. There can be only one Notice Master per group. If you check the Notice Master field for a user and there is already a designated notice master in the group, a message will display indicating that a Notice Master for a previous member of the group has been cleared.
- Allow group choice – This option controls whether a prompt displays in the Checkout, Place Hold and Bill User wizards to determine if the transaction (charge, hold or bill) is for the group or individual.

Groups and Responsibilities

1. Policy ADULT

   Level SELF

   Type NONE

   This iteration is used to group together 2 or more adults. The user is not affected by the delinquency of other members of the group.

2. Policy ADULTLINK

   Level LINKED

   Type NONE

   This iteration is used to group together 2 or more adults. Each user in the group inherits the delinquency status from the "worse-case" user in the group.

3. Policy CHILD

   Level SELF

   Type NONE

   This iteration is used for a child that is part of a parent group that is not linked.

4. Policy CHILDLINK

   Level LINKED

   Type NONE

   This iteration is used when the child is a member of a LINKED group. This user inherits delinquency status from the "worse-case" user in the group.

5. Policy PARENT

   Level SELF

   Type HEAD

   This iteration is used for a parent in a group. The user is not affected by the delinquency of other members of the group. This type connects User IDs together for CHECKOUT purposes only. All checkouts for the group belong to the user with the policy type HEAD regardless of which card is used for the checkout. The user profile for the HEAD of this group would have the profile limits applied (checkouts).

6. Policy PARENTLINK

   Level LINKED

   Type HEAD

   This iteration is used for a parent of a group. This user inherits delinquency status from the "worse-case" user in the group. This type links User IDs together for CHECKOUT purposes only. All checkouts for the group belong to the user with the policy type HEAD. The user profile for the HEAD of this group would have the profile limits applied (checkouts).

7. Policy PARENTLN

   Level LINKED

   Type NONE

   This iteration is used for the parent in a group. This user inherits delinquency status from the "worse-case" user in the group.

8. Policy PARENTSN

   Level SELF

   Type NONE

   This iteration is used for the parent in a group. The user is not affected by the delinquency of other members of the group.

To check if a user is a part of a User group

1. From Display User, retrieve user record.
2. Group ID may display (below user's name). In the summary tab, the Group Name and Group ID may also display.
3. Click on the "User Groups" tab to view detailed information about each member of this user's existing group.
4. If no user information displays in the bottom of the screen from the "User Groups" tab, this user is not part of a user group.

To create a User group

1. From Modify User wizard, retrieve user record.
2. Click on the "User Groups" tab.
3. Create Group name by typing it in the group name field.
4. Select Responsibility Policy from the drop down menu (level and type will auto fill).
5. Select Access (charges, holds, bills etc.).
6. Click on Save, then Close. Group is created.

To add a user to an existing User group

1. Identity user group name by searching for an existing member of the group
2. Modify User wizard, retrieve user to be added to group.
3. Click on the "User Groups" tab
4. Enter Group Name of original member
5. Select Policy from the drop down menu (Level and Type will autofill).
6. Select Access (charges, holds, bills etc)
7. Click Save
8. Click Yes to "Add User to existing user group"?
9. Close

To pay bills for members of a User Group

This helper can be used to make a payment for a single bill, all bills for a given user or applied to the total bill for all group members. In order for a member of a group to pay bills for other members of the group, this user must have the "Pay Bills" box ticked, otherwise the member can only pay bills on his/her own account.

1. In the Pay Bills wizard, retrieve the user who is paying a user Group Bill. Click on the "Pay User Group Bills" helper. The money owed will display for this user but in the pane on the on the left side of the screen are the User IDs of the members of the group. The User IDs that are bolded are group members who owe money.
2. Select appropriate User ID and pay some or all money owed.

To remove a user from a User group

1. In Modify User, retrieve user to be removed from group
2. Click on the "User Groups" tab
3. Click on the "Remove Group Membership" helper
4. Identify which member(s) of the group to remove
5. Click OK

Additional Functionality

- <u>“Display User” wizard</u>
    - Staff can identify if the patron is a member of a group by clicking on the “User Group” tab in a user record. If all options are blank, the user is not part of a group. If the user is part of a group, the user group profiles will display as well as group information.
    - Retrieve user record. “Display User Group Holds” helper. The user ID will be bolded if the user in this group has at least one hold. Click for details.
    - Retrieve user record. “Display User Group Charges” helper. The user ID will be bolded if the user in this group has at least one item checked out. Click for details.
    - Retrieve user record. “Display User Group Bills” helper. The user ID will be bolded if the user in this group owes money. Click for details.
    - The pop up “All of this user’s holds (or charges or bills) are outside this group” reflects activity prior to group membership.

- <u>“Modify User” wizard</u>
    - Staff can edit some user group information for the user by clicking on the “User Group” tab. Staff can also view information on other members of the group by clicking on the “User Group” tab, clicking on the “group name” gadget and then selecting “Show Group Membership”.
    - Staff can remove one or all members of the group using this wizard. Retrieve user’s record. Click on the “User Groups” tab and then the “Remove Group Membership” helper. Select which member(s) of the group is to be removed.
    - Once a user is part of a group, the GROUP ID can display for each member. The GROUP ID should match the Group Name. Enter the GROUP ID in Modify User, Basic Info Tab for each member of a specific group.

- Search for a user and change the "type from "Keyword" to "Browse User Groups". Enter your 3 letter agency code to see a list of all the user groups for your library. Enter your 3 letter code followed by the last 4 digits of the group leader's phone number if this information is known.

- Enterprise: Any user that is joined in a user group will have some information that can be viewed from Enterprise. The amount and kind of information that can be viewed is determined by the Responsibility Level – LINKED or SELF.

LINKED

- For LINKED groups, (the responsibility level is LINKED for at least one member of the group), the status of the delinquencies of one group member will also display in Enterprise when a user logs into "My Account".
- For LINKED groups, a user can have an OK status (personal) in Enterprise with a GROUP status of DELINQUENT, BLOCKED or COLLECTION. Remember that the responsibility level of LINKED is very powerful and can prohibit any member of the group from placing holds, checking out and renewing in WorkFlows as well as in Enterprise. Never override any blocks for a user that does not belong to your library.
- When a user who is part of a LINKED group logs into "My Account" in Enterprise, the user will be able to view a list of group members from the Personal Information tab/Group members. From the Fines Tab, the user can view current Fines and Blocks, Group Accruing Fines as well as the Group Fines.

SELF

- For groups that are connected by a Responsibility of SELF, the user status and group status will display in Enterprise from "My Account" for each member.
- A user from a group with a Responsibility of SELF can view a list of group members once logged in to "My Account". This can be accessed from the Personal Information tab/Group Members and will display Role, User ID and user name.