Discover an introduction to users and user reference data in OLIB.

About users

In OLIB, 'users' are regarded as anyone who accesses the system for whatever reason, whether it is as an end user, a member of the library staff or a system administrator. A record in the database contains personal details of each user, plus various settings which determine what that user is allowed to do.

End users normally have read-only access to the system to search the database for items of interest and, optionally, to place reservation requests and ILL requests, and even to issue items to themselves and to renew and return those items subsequently. Access for end users is normally provided by WebView, OLIB’s web OPAC. WebView also allows users to see their personal details, together with their loan items, reservations and requests.

OLIB can also be used as an OPAC. In the OPAC, users can also see their personal and other details as well as searching the database for items of interest, placing reservations and ILL requests. However, by assigning the relevant permissions, end users can be allowed to do much more, including editing their personal details.

Staff and system administrators access the system using OLIB Web or WorldView. By setting the relevant user privilege levels, assigning users to the relevant user groups and setting individual permissions where relevant, you can control what each member of staff can do at a very detailed level. System administrators normally have access to the entire system.

Staff and end user records are accessed, added, edited and deleted in the same way in OLIB, using the Users domain.

What the end user sees in the OPAC

The system manager can configure the OPAC (Folio) to enable users to find and edit details of their own record.

Note: if this function is not required it is possible to disable it in OPAC Configuration.

To view their details in the OPAC, the users selects the Account Details option.

As an end user if you have not already logged in to the OPAC, a prompt is displayed for you to enter your barcode and password. The Account Details screen is then displayed.

Depending on how your OPAC has been configured, the user details screen includes:

- selected personal details
- a list of loans
- reservations, ILL requests awaiting processing and unfulfilled ILL requests
- any circulation lists you may be a member of
• the opportunity to renew loan items, and cancel ILL requests awaiting processing

Note: once you have finished your Folio session, you should use logout so that your personal details are not visible to other users. Folio is usually configured to time out automatically after a period of inactivity. Nevertheless, logging out should be standard practice when you have finished using the OPAC.

User reference data

User Categories

Reference Data>User Categories

These also exist in Circulation and are used in Loan Terms to define borrowing rights. Every user/patron must have a user category, and at least one User Category should exist to enable this.

Caution: if you have a category of "external" users, please avoid creating EXT for their User Category code. The EXT code in OLIB is reserved for special processing.

Address types

Reference Data>Address Types

A range of address types may be needed to differentiate between various addresses for users.

Different types of address include home address, work address and so on. The Key ID field is unusual in that it allows only a single character to be entered. Several predefined address types are supplied, you can also add others.

Note: if you implement automated overdue notices, the address type determines which address overdue notices will be sent. It is a parameter used when you define the Overdue Defaults in OLIB Defaults and is normally code P. It is also a parameter used in recall notices.

Courses

Reference Data>Courses

Details of the courses run in an institution can be created so that they are available for adding to user records.

Departments

Reference Data>Departments

A range of departments may be created. It is possible to filter searches for users by department, and circulation reports in the Reports library use course and department as parameters.
Districts

Reference Data>Districts

To specify the geographic District where the user lives.

Institutions

Reference Data>Institutions

To specify if a User belongs to another (academic?) institution - with whom the library perhaps has reciprocal borrowing rights.

User Types

Reference Data>User Types

To indicate kind of user, e.g. Adult, Student, Child etc.

Other reference data

Other reference data which is relevant to the setup of user records is described in About circulation reference data.

Default settings

There are several default settings which affect the creation of user records. In OLIB Defaults (User and Circulation), the Warning days before expiry may be set; and in Admin Client Defaults the default User Category and Location may be set.