User details

You can find a user’s details from the Circ. Desk screen. For example if the user barcode is not known.

Click on **User > Search** to search e.g. by Surname for the User's record.

Locate the correct User. To carry the record back to the Circ. Desk screen, click the check box in the list and click **Insert**.

Alternatively click on the User name to display User record details including:

- User name, Address, Barcode and Email
- User Category and Location
- Expiry Date
- Department, Room and Course information
- Circulation details displaying loan privileges along with details of items on loan, reservations and traps currently applicable to the user

The Loans list box displays:

<table>
<thead>
<tr>
<th>BARCODE/TITLE</th>
<th>DUE DATE</th>
<th>STATUS</th>
<th>FINE</th>
<th>CURR / NEXT ODUE STEP</th>
<th>DATE SENT / DUE TO BE SENT</th>
<th>SEND STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>GB02 - Pragmatic marketing</td>
<td>01-AUG-2019</td>
<td>Overdue</td>
<td>3.00</td>
<td>2</td>
<td>04-AUG-2019</td>
<td>Sent</td>
</tr>
</tbody>
</table>

If overdue, this includes details of which point in the overdue sequence an item has reached.

**Curr./Next Odue Step:** Shows the current overdue step if the notice has been sent and the next step’s notice has not yet been scheduled (or if there is no next step). Shows the next step if this has been scheduled.

**Date Sent/Due To Be Sent:** Shows the date the current notice was sent if the next step’s notice has not yet been scheduled (or if there is no next step). Shows the date the next notice is due to be sent if this has been scheduled.
**Send Status:** Indicates the status of the current or next notice.

In addition, a full audit trail is retained of all alerts sent. For users, this is displayed in various list boxes on a Notice History sheet on the Users layout. Lists boxes are available for overdue notices, loan reminder notices, broadcast notices and miscellaneous notices (i.e. other types of notice).

## View loans history and fines details

The list in **Transaction History** shows:

<table>
<thead>
<tr>
<th>TITLE</th>
<th>COPY BARCODE</th>
<th>TRANSACTION</th>
<th>DATE/TIME</th>
<th>TRANSACTION RECORD</th>
<th>SOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find me a family: the stor</td>
<td>030006</td>
<td>Return</td>
<td>01-JUN-2019 11:32:24</td>
<td>Seddon, Judith</td>
<td>OLIB Web</td>
</tr>
<tr>
<td>Why animal welfare must</td>
<td>015962</td>
<td>Return</td>
<td>01-JUN-2019 11:32:07</td>
<td>Seddon, Judith</td>
<td>OLIB Web</td>
</tr>
</tbody>
</table>

1. Go to **Users> Search** to search e.g. by Surname for the User's record.
2. Click on the User name to display User record details.
3. The first page displays circulation details including loan privileges along with details of items on loan, reservations and traps currently applicable to the user.
4. Click the **Circulation History** tab to display earlier loan transaction details and fines for this User.

In **Transaction History** you can toggle between all transactions for that user, or transactions at the current PC Location for that user. Tick one of the transaction records and in Actions select **Switch between system-wide and local lists**.

Reservation transactions: there is a single entry for each reservation placed, cancelled or cancelled satisfied. (Any multiple copies are not shown).

The **Fine History** display lists both the date a transaction was carried out (the transaction date) and the processed date (the date the charges were calculated).

## Edit user details

As well as in **Searches> Users**, you can find and edit details from the Circ. Desk screen:

1. From the Circ. Desk screen click on **User> Search** to search e.g. by Surname for the User's record.
2. Click Modify next to the User name to open and edit the record.
3. Make the necessary changes and save the record.

The User details are carried back to the Circ. Details screen.
View notice history

OLIB displays a history of the email notices sent to a user.

1. Go to Search> Users> to search e.g. by Surname for the User's record.
2. Click on the User name to display User record details.
3. Click the tab for the Email Notice History sheet. This displays a record of all email notices sent to this user, divided into different notice types.

The Circulation Transaction alerts can also be viewed in this history sheet. To enable this feature the system manager needs to add the attribute, using the Layout Manager:

- Circulation Transaction Notice History (bo_ctrans_notice_hist)

Suspend email alerts

OLIB includes a Yes/No flag to suspend all email alerts for a specific user. On the Users layout go to the Email Notice History sheet. The Suspend All Emails? flag is included at the top of the page.

Create user details

As well as the Search> Users domain, you can create users from the Circ. Desk:

1. Click on User> Search to access the User domain.
2. Click New Record to open a blank screen for input.
3. Enter details as normal for the user and Save and Close.
4. OLIB returns you to the Circ. Desk screen so you can now enter the user's barcode and carry out their transactions.