WorkFlows and iBistro:

Family Card
(User Group)

Contents

Family Card (User Group)

Introduction

Library staff can create a **family card,** also known as a **user group** in WorkFlows, and can assign patrons to that family card.

The advantage of the family card is that you can view all bills of a group at one time and that when you go to pay the bills, WorkFlows presents them all in one place.

It is up to the library director and circulation staff (along with the patron, if the library wishes) to decide who is linked and who is not linked. For example, it might be a benefit to the library to link the members of a family or of a local institution/group to ensure payment by someone in the group if one member tends to run up a bill.

Now, here is a preview of some of the points that I will demonstrate today:

- The family card *is not* a physical library card.
- We are only concerned with bills, not checkouts or holds.
- Library staff can view any family card bills in WorkFlows.
- A family card member can only view his or her own bills in iBistro; no member of a family card can view the bills of any other member of the family card in iBistro.
- Any member of a family card can pay the bills of any other member of the family card.
- A family card member is either **linked** or **not linked** to other members of the family card with respect to delinquency of money owed.

The wizards that you will most frequently use are User Registration, Display User, Modify User, and Paying Bills. You will need to set up about ten properties in order to use the family card feature.

WorkFlows

Properties

These are the properties for using the family card for bills.

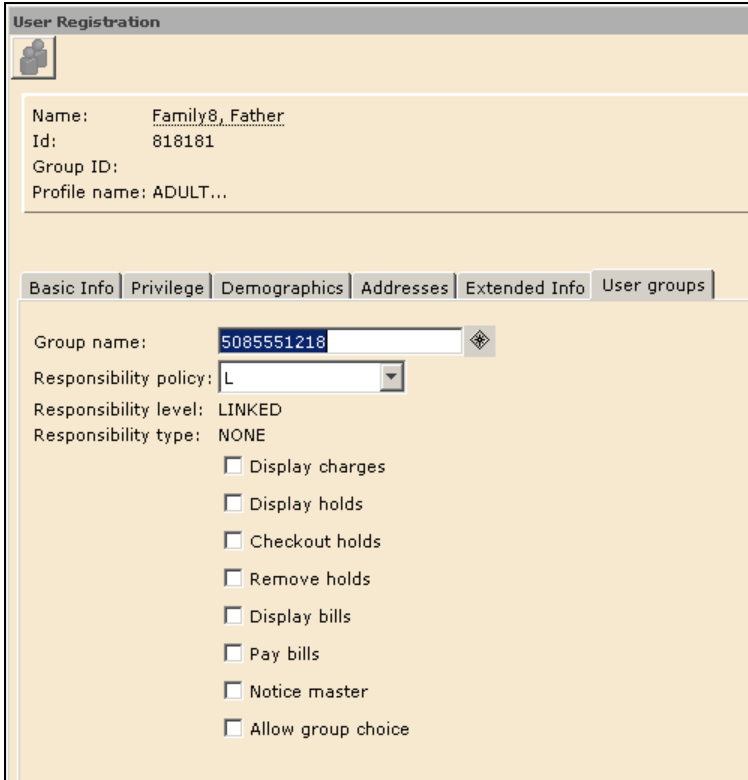| Wizard	Tab	Property	Action
User Registration	Behavior	Show Usergroups tab	Check
User Registration	Defaults	Responsibility policy	Blank, L or NL (library's preference)
Display User	Behavior	Show Usergroups tab	Check
Display User	Helpers	Display User Group Bills	Check
Display User (if you print receipts for paid bills)	Helpers	Configure "Pay Bills" helper	"Print slip …" Title / Author / Item ID / Reason for Bill / Amount Billed / Amount Paid / Payment Date
Paying Bills	Helpers	Pay User Group Bills	Check
Modify User	Behavior	Show Usergroups tab	Check
Modify User	Defaults	Responsibility policy	Blank, L or NL (library preference)
Modify User	Helpers	Remove Users from Group	Check
Paying Bills (if you print receipts for paid bills)	Behavior	Configure "Print slip showing payments"	Title / Author / Item ID / Reason for Bill / Amount Billed / Amount Paid / Payment Date
Copy User (if you want to clone a patron at the end of user registration)	Behavior	Auto-generated User ID	Not checked
Copy User (if you want to clone a patron at the end of user registration)	Behavior	Clone User Extended Info	Not checked

Creating a family card and adding a new patron to the family card

You can create a new family card at the same time that you register the first patron of that family card.

1. Click the **User Registration** wizard and begin to register the patron, as you normally would.

2. Before you finish registering the patron, click the **User Groups** tab.

3. Enter a name for the family card in the **Group Name** field. Use the **telephone number** as a family card name. By entering a name here, you are creating the new family card.

   If the family card already exists, search for it by using the gadget.

4. Select L or NL (for linked or not linked) from the **Responsibility Policy** drop-down list.

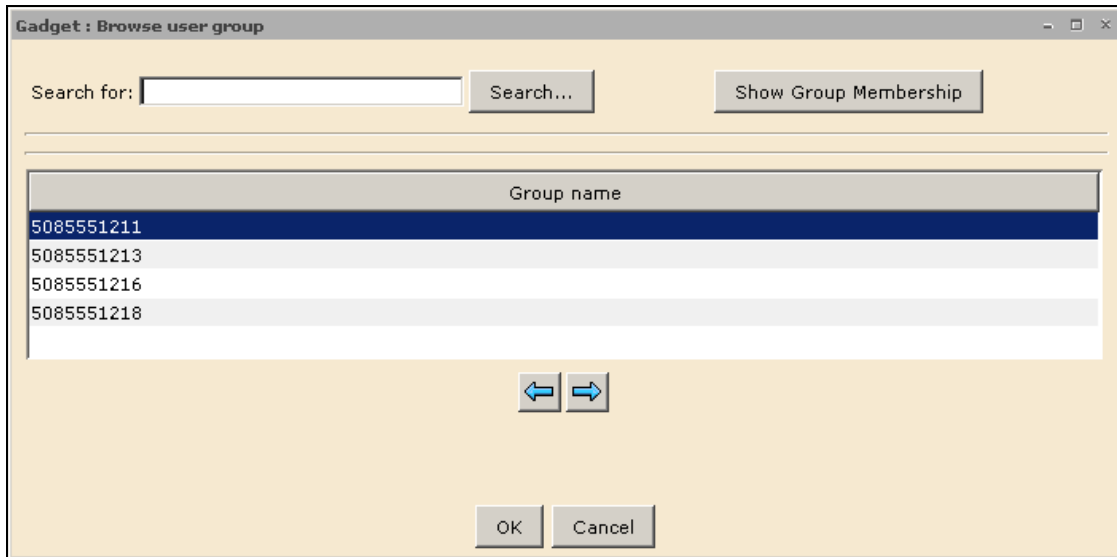5. *Do not* check any of the check boxes.

6. When you finish registering the patron, click the **Register User** button.

7. If you are registering more members of the same family, you can click the **Clone/Copy To New User** button. (Your Copy User wizard properties must be set for Clone to work). The family card settings are carried over to the next patron. Continue registering the new patron..

Adding a new patron to an existing family card

Once a family card is established, you can family members at a later time.

    1. Use the **User Registration** wizard to register a patron and click the **User Groups** tab.

    2. In the **Group Name** field, instead of entering a family card name (that is, a telephone number), use the gadget to search for a name that has already been created. Hint: In the gadget, enter the first few digits of the family card name and click **Search**.

Gadget : Browse user group

Search for: [   ] Search...   Show Group Membership

Group name
5085551211
5085551213
5085551216
5085551218

⇐ ⇒

OK   Cancel

    3. Select the **Group Name**, click **OK** and continue registering the patron, as usual.

Creating a family card for an existing patron

If a patron already exists in the system and you want to create a new family card and add him or her, use the **Modify User** wizard.

1. Click the **Modify User** wizard.

2. Enter the patron **User ID**.

3. Click the **User Groups** tab.

4. Enter a **Group Name**. Use the **telephone number** as a family card name. By entering a name here, you are creating the new family card.

5. Select a **Responsibility Policy**. Do not check any check boxes.

6. Click **Modify User**.

Note: If there are bills attached to the patron *before* the patron is added to a family card, these bills will not appear immediately if you try to display them in WorkFlows – you will get a message saying that they are "outside the group." However, the bills will appear the next day – SAILS needs to run a nightly process that adds them to the family card.

Removing a family card and its members

1. Click the **Modify User** wizard.

2. Enter the **User ID** of a family card member.

3. Click the **User Family cards** tab.

4. Click the **Remove Family card Membership** helper.

Modify User : Remove Group Membership FAMILY3				
List of users				
☐ Select All				
Select	Name	User ID	Alt ID	Phone
☑	Family3, Harry	8888		
☐	Family3, Nora	9999		
☐	Family3, Christine	101010		
☐	Family3, Peter	111111		
☐	Family3, Lori-Ann	121212		

OK   Close

5. Select the patron you want to remove.

   To remove the family card entirely, *including the name of the family card from drop-down lists*, select all the members of the family card. In other words, when the last family card member is removed, the family card is removed.
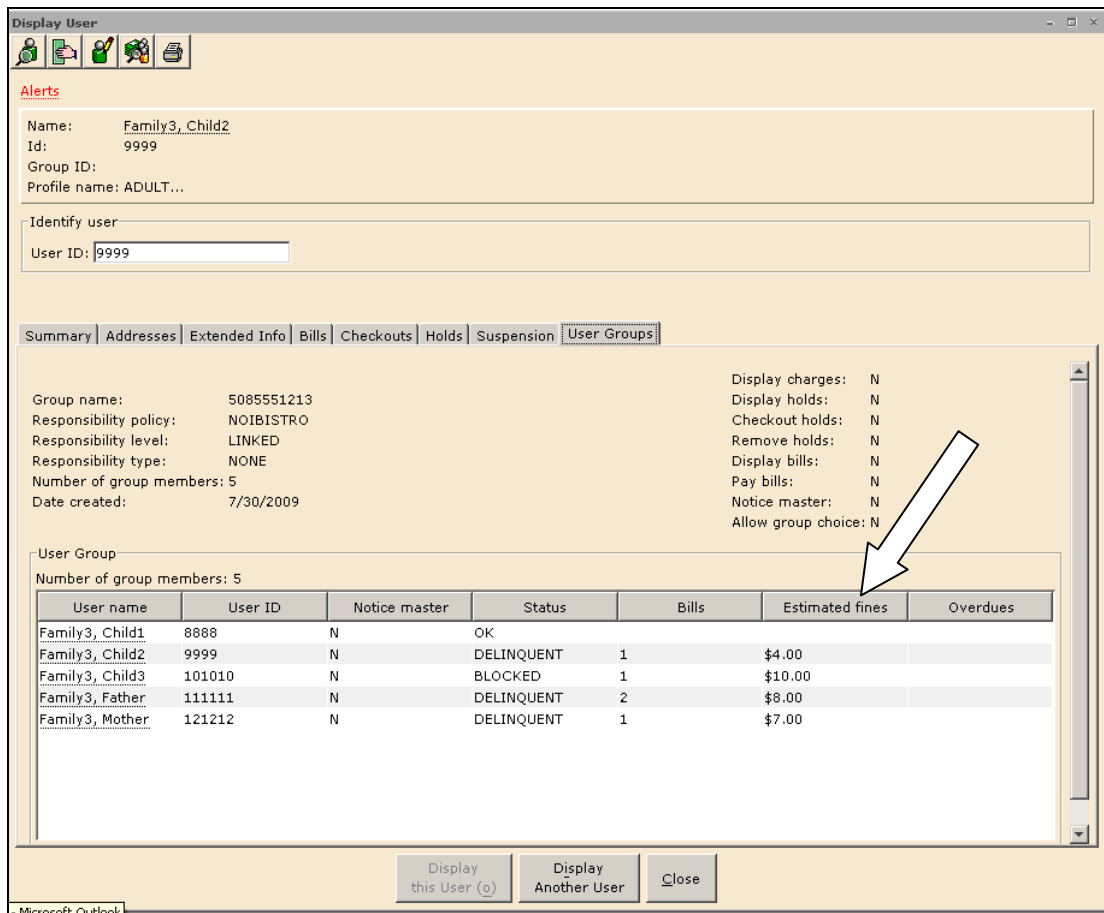
   This step does not delete the patron(s) from the system, but just removes them from the family card.

5. Click **OK**.

Viewing and paying family card bills

To view and then pay family card bills:

1. Click the **Display User** wizard.

2. Enter the **User ID** of a family card member.

3. Click the **User Groups** tab and view the **Estimated Fines**.

4. *If the patron has a bill*, click the **Pay Bills** helper.

5. Click the **Pay Family card Bills** helper.

Display User : 5085551213

```
5085551213
    8888
9999
101010
111111
121212
```

Name: Family3, Child2
Id: 9999
Group ID:
Profile name: ADULT...

Total bills and payments

Total bills: 1   Payment: [   ]

Total owed: Payment type: [CASH ▾]

Individual Bills and Payments

Title	Item ID	Reason	Owes	Payment Type	Pay...	Cha...	Billed	Date
		PRINT...	$4.00	CASH ▾			$4.00	8/25...

Pay Bills (o)   Lookup Another User Group   Return To Search List   Cancel

6. To pay for one or more patrons, click a **User ID** on the left side and enter the **Payment** amount and **Payment Type.** Repeat this step for each patron that you want to pay for.

7. When you finish entering payments, click **Pay Bills**. A summary appears (see next page).

Display User : Summary of User Group Payments

Totals

Total amount received: $6.00   Total payment: $6.00   Total change: $0.00

User Payment Summary

User ID	User Total Payments	User Total Change
101010	$5.00	$0.00
9999	$1.00	$0.00

List Payments To Bills

User ID	Item ID	Title	Bill Reason	Total Am...	Total Owed	Payment	Still Owes	Change	Payment ...
101010			TUTOR	$10.00	$10.00	$5.00	$5.00		CASH
9999			PRINTING	$4.00	$4.00	$1.00	$3.00		CASH

Failed Payments

User ID	Error Me...	Item ID	Title	Bill Reas...	Total Ow...	Total Ba...	Payment	Still Owes	Change	Paymen...

Close

When paying bills, if you enter a family card member *and the family card member has no bills of his own*, the procedure is slightly different:

Click the **Paying Bills** *wizard*, instead of the helper

Click the **Pay Group Bills** helper, which brings up a search box.

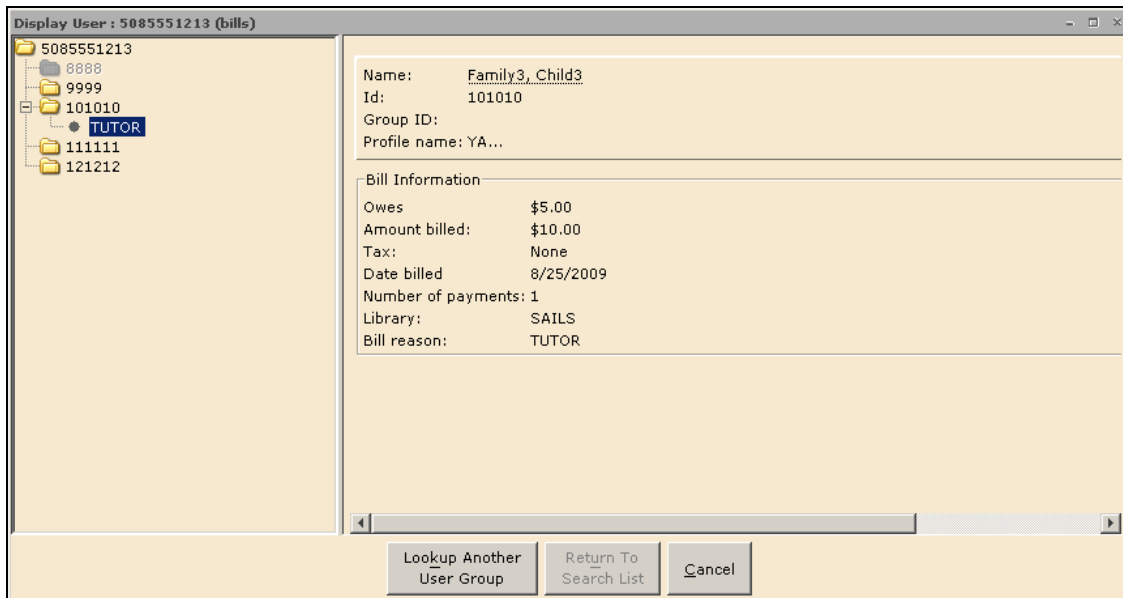Click on the **current patron**. This will bring up the bills screen.

Pay the bills as just described.

Note: WorkFlows prints a receipt if you configure the Pay Bills helper of the Display User wizard.

Displaying the details of a family card member's bills

To display the detail of a family card member's bills:

1. Click the **Display User** wizard.

2. Scan the **User ID**.

3. Click the **Display User Group Bills** helper.

4. On the left side, click a **User ID.**

5. Click one of the bills that appears under the User ID. The details appear on the right side of the screen.

```
Display User : 5085551213 (bills)                                    _ □ ×

📁 5085551213
   📁 8888                    Name:        Family3, Child3
   📁 9999                    Id:              101010
   📁 101010                  Group ID:
      ● TUTOR                 Profile name: YA...
   📁 111111
   📁 121212                  ┌Bill Information─────────────────────────────┐
                              Owes                $5.00
                              Amount billed:      $10.00
                              Tax:                None
                              Date billed         8/25/2009
                              Number of payments: 1
                              Library:            SAILS
                              Bill reason:        TUTOR
                              └─────────────────────────────────────────────┘



                              ◄                                            ►

              ┌──────────────┐ ┌──────────┐ ┌────────┐
              │ Lookup Another│ │ Return To │ │ Cancel │
              │  User Group   │ │Search List│ │        │
              └──────────────┘ └──────────┘ └────────┘
```

Searching for a patron by browsing the family cards

You can search for a patron by browsing for the patron's family card:

1. Click the **User Search** helper.

2. Enter part of the family card name in the **Search For** field and select the **Browse Family card** radio button. Click **Search**.

2. Select the family card from the resulting list and click **Display This Family card**.

3. Select a patron and click **Display This User**.

Frequently Asked Questions

If a family card member is Not Linked, does he or she get blocked if someone else is blocked?
Answer: No

If each family card member owes under $10 but together the total adds up to more than $10, are they blocked?
Answer: No one is blocked.

Can a family card member pay bills for another member of the same family card if those members are Not Linked?
Answer: Yes

iBistro

What a family card member sees when viewing iBistro

To view the account summary and bills, the family card member logs into iBistro, clicks **My Account**, and then clicks **Review My Account**.

The **Account Summary** tab displays that the family card is Blocked or Delinquent, if that is the case.

On the **Bills** tab, a family card member cannot see any other family card member's bills.