USER GROUPS
REL. 3.5.0.0

Contents

Introduction

The User Groups tab allows you to link user records together for circulation purposes. This can be used in public library settings to link together members of the same family.   The system can be configured to allow the parents to see what their children have checked out and what bills they have.   It can also be configured so that all users will inherit the worst case delinquency from any member of the group.   For example, if the parent's status is delinquent but the child's is blocked, the parent's status will therefore be blocked. 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.

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	Parent – can pay bills for members of the group. Delinquency status among group members are shared L –Delinquency status among group are shared NL – User does not share delinquency status with other group members
Display User	Behavior	Show Usergroups tab	Check
Display User	Helpers	Display User Group Bills	Check
Paying Bills	Helpers	Pay User Group Bills	Check
Modify User	Behavior	Show Usergroups tab	Check
Modify User	Helpers	Remove Users from Group	Check

To create a new user and assign them to a group

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 the **Group Name.** By entering a name (telephone number) here, you are creating the new family card.

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

4. Select Parent, L or NL from the **Responsibility Policy** drop-down list.

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

NOTES: To add an existing user to a group, use the Modify User wizard.

NOTES: To add an existing user to a group, use the Modify User wizard, go to the User Groups tab and type in the group name and click "save".

Adding a new patron to an existing User Group

Once a User Group 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 user group 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**.
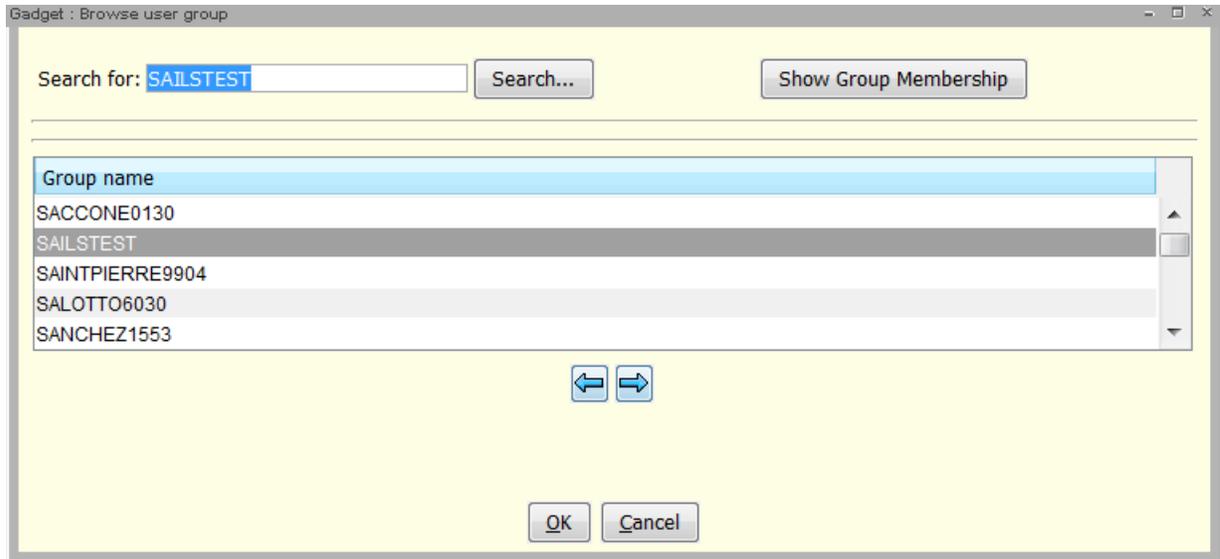
3. Select the **Group Name**, click **OK** and continue registering the patron, as usual

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.

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**.

Pay User Group Bills Helper

The **Pay** User Group **Bills** Helper is used to accept **bill** payment for members of a user group during another circulation activity, typically when using the **Paying Bills** wizard or **Pay Bills** helper. 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.

1   Click the **Pay User Group Bills** helper.

2   The **User Search** helper appears. Search for a user who is a member of the user group.

3   A window opens with a list in the left pane of user IDs for users in the group. The user ID of users with unpaid **bills** displays normally, with a folder next to the user ID. The user IDs of group members who do not have unpaid bills display in gray. To **pay** a **bill** or **bills** for a user, select the user ID from the left pane.

4   In the right pane, the user information area displays useful information about the user, including the user's status and amount owed. Under Total **Bills** and Payments, the total number of bills and total amount owed is shown. Under Individual Bills and Payments, each **bill** displays on a separate line.

Note: If the Deletion of Items with **Bills** feature is enabled and an item associated with a **bill** has been
deleted from the catalog, the item ID field will be blank.

To apply payment to the total amount owed for a user in the group

- Select a user with unpaid **bills** from the left pane.
- Under **Total Bills and Payments**, type the payment amount in the **Payment** box (for example, 1.75, $1.75, .50, or $.50)
- In the **Payment Type** list, select the payment type.
- Click **Pay Bills**.

A window opens with a summary of user group payments, showing the total payment made for the group and any change due. Under User Payment Summary, a list of payments for individual users displays. List Payment to **Bills** shows how payments were applied to each individual **bill**. Under Failed Payments, a list of bills which were not paid successfully displays. This is typically caused by entering payment amounts in an improper format.

To apply payments to an individual bill for a user in the group

- Select a user with unpaid **bills** from the left pane.
- Under **Individual Bills and Payment,** select the **bill** to be paid.
- If you want to change the payment type, click the **Payment Type** field

on the selected **bill** to display a list, and then select the payment type.
- Click the **Payment** field. With the field selected, type the payment amount.
- Click **Pay Bills** when you have finished entering payment information.

To pay all the outstanding bills for a user group
- Select a user with unpaid **bills** from the left pane.
- Under **Total Bills and Payments**, type the payment amount in the **Payment** box (for example, 1.75, $1.75, .50, or $.50)
- In the **Payment Type** list, select the payment type.
- Do not click **Pay Bills**. Instead, select another user with unpaid **bills** from the left pane. The previous user's ID now displays with a green currency icon next to it.
- Enter the payment and select the payment type for the second user under **Total Bills an**d
Payments. Repeat this step for each user in the group with unpaid **bills**.

- Click **Pay Bills** when you have finished entering payment information.

A window opens with a summary of user group payments, showing the total payment made for the group and any change due. Under User Payment Summary, a list of payments for individual users displays. List Payment to **Bills** shows how payments were applied to each individual **bill**. Under Failed Payments, a list of bills which were not paid successfully displays. This is typically caused by entering payment amounts in an improper format.

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Paying Bills : Summary of User Group Payments

Totals
Total amount received: $2.00   Total payment: $1.50   Total change: $0.50

User Payment Summary

User ID	User Total Payments	User Total Change
FAMILY1	$1.00	$0.00
FAMILYCHILD	$0.50	$0.50

List Payments To Bills

Use...	Ite...	Title	Bill ...	Tot...	Tot...	Pay...	Still ...	Cha...	Pay...
FAMIL...			MISC	$0.50	$0.50	$1.00	$0.00	$0.50	CANC...
FAMIL...			MISC	$0.50	$0.50	$0.50	$0.00		CANC...
FAMIL...			MISC	$0.50	$0.50	$1.00	$0.00	$0.50	CANC...

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**.

ENTERPRISE

Viewing Group Information in Enterprise

This option is only available to the User Group Member with the PARENT responsibility.   To view the list of group members and bills, the PARENT logs into Enterprise and clicks **My Account**, and then clicks **Review My Account**.   Under Personal Information, the PARENT sees the Group Members option.   Clicking on this will display all members of the group. Also the group's status and outstanding fines will display to the right.

Paying Group Fines in Enterprise

The ability to pay outstanding group fines as well as individual fines is only available to the PARENT of a User Group.

The system will automatically display just the individual fines when the user clicks on the FINES tab.

If the patron's user group responsibility is PARENT they can also click on Group Fines and select those for payment.   This is the only place in Enterprise where they can see title information. Group members checkouts and holds are not available for display even if the user has the PARENT group responsibility.

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