

Setting up User Groups and adding members.

User Groups in WorkFlows is a powerful tool that allows you to link family members, club members, school classes, etc and assign a single person responsible for the circulation activities of the other members of the group. Here's a scenario:

Group name: JASI-Smith_John

○ Members:

- John Smith, father
- Joan Smith, mother
- Jack Smith, son
- Jane Smith, daughter

- Jack Smith checks out a book that becomes overdue.
- John Smith (father) checks out a book at a different time but a pop-up is display to the staff member that Jack Smith has overdues and John Smith is responsible.
- Overdue notices will go to John Smith as well as Jack.

Once groups are setup, patrons can also see their group activity when they log into their OPAC accounts online. This is a very convenient way for parents to monitor their children's circulation activities.

Important considerations

Security and Naming Conventions for JASI Members

User Groups are visible and accessible by all JASI consortia libraries. A mandatory naming convention must be used when creating the group in order to identify it as your library. In our example we used JASI as the library so the group names would use **JASI-Lastname_Firstname** or **JASI-Lastname,Firstname**

For example, A group name for Atikokan Public library might look like this:

ATI-Lewis, Jonathan

User Groups Tab

The User Groups tab allows you to add a user to a new group, add a user to an existing group or modify the responsibility policy and responsibility levels of an existing group member. When you add a user to a group you must select the appropriate Responsibility Policy. Once the policy is selected the

responsibility level, responsibility type and responsibility levels will default in from the policy settings. These can be modified if needed at the user level.

The User Groups tab consists of the following fields.

Group Name

Specifies the Group Name for this user. If you manually enter a Group Name that does not already exist, the new Group Name will be created. If you manually enter a Group Name that already exists, you will be given the option to add the user to the existing group. Alternately, you may select the Group Name by using the Browse User Group Gadget.

Responsibility Policy

Select the appropriate policy from the drop down list. The default setting for the Responsibility Policy field can be set in the New User Registration wizard properties. Once the Responsibility policy is selected, the appropriate Responsibility Level, User type and default access levels will display.

Responsibility Level

Displays the level of responsibility for delinquencies. The level can be either SELF or LINKED. This value is determined by the Responsibility Policy.

Responsibility Type

The type field is used to indicate if transactions such as checkouts are handled differently. This value is determined by the Responsibility Policy.

Select any of the following check boxes. The access levels are mostly relevant when the user is logged into the OPAC. Staff members will have access to group records in the WorkFlows client.

Display Charges

This option allows the user to see charges for other members of the group. The initial values defaults in from the selected Responsibility Policy but can be modified at the user level.

Display Holds

This option allows the user to see holds that belong to other members of the group. The initial values defaults in from the selected Responsibility Policy but can be modified at the user level.

Checkout Holds

This option allows the user to check out items on hold for other members of the group. The initial values defaults in from the selected Responsibility Policy but can be modified at the user level.

Remove Holds

Allows members of the group to remove holds for other members. The initial values defaults in from the selected Responsibility Policy but can be modified at the user level.

Display Bills

This option allows the user to see bills that belong to other members of the group. The initial values defaults in from the selected Responsibility Policy but can be modified at the user level.

Pay Bills

This option allows the user to pay bills for other members of the group. The initial values defaults in from the selected Responsibility Policy but can be modified at the user level.

Notice Master

This flag determines if all notices for the group are sent to this user. There can only be 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 the Notice Master flag for the previous user has been cleared.

Allow Group Choice

This flag 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.

Examples

Family Group name examples:

JASI-Smith_John

Member: John Smith assumes responsibility for the group/family/class/etc

Member: Mrs. Smith

Member: Jimmy Smith

Member: Brenda Smith

JASI-Jones_Jane

Jane Jones assumes responsibility for the group/family/class/etc

Member: Mr. Jones

Member: Davey Jones
Member: Howard Jones

JASI-Smith_Fred

Fred Smith assumes responsibility for the group/family/class/etc

Member: Mrs. Smith
Member: Steven Smith
Member: Karen Smith

Club Group name examples:

JASI-BookClub

Janet Ross assumes responsibility for the group/family/class/etc

Member: Jerry Donahue
Member: Samantha Bee
Member: Harry Willard
Member: Carol LaPointe
Member: Simone Davis
Member: Danielle Auberge

Class/School/Teacher Group name examples:

JASI-Grade 3_JRoss

Janet Ross is the teacher and **assumes** responsibility for the group/family/class/etc

Member: Jerry Donahue
Member: Samantha Bee
Member: Harry Willard
Member: Carol LaPointe
Member: Simone Davis
Member: Danielle Auberge