Other Circulation wizards:

Display User

This highly useful wizard will display everything about a borrower in a single tabbed window. If you don't have a borrower's ID to scan, you may choose the Search User "helper"

The helper allows you to search on the borrower's name. When doing so, try choosing "browse" rather than "keyword" under the search type. When you do a browse search on the name, all the results will be on the last name, but if you do a keyword search on the name, the search includes last name and first name, resulting in a large mixed list.

Browse search results on the name "DAVID":

Keyword search results on the name "DAVID":

You can also change the index and search on something else, such as phone number. Note that you must use the Keyword search type when searching any index other than Name.

Select a user from this list and click on "Display this User" to see the Summary tab of the Display User screen, which shows brief details about the borrower's current status. Each of the other tabs will show this information in detail:

Addresses—If more than one address exists, info from address 1 and 2 will display here.

Extended Info—Anything entered in the Extended Info field will display here, as well as the two most recent Lost IDs, if any exist.

Bills—By default, all Unpaid bills will display here. Choosing All or Paid Bills in the Display options at the bottom of the screen allows one to see more about the borrower's bill history, such as which bills have been paid, how and where they were paid, and more. Click on the dollar amount in the "Owes" column for more details.

Checkouts—Shows a detailed list of all items currently checked out to the borrower. By clicking on the item ID, more details can be seen about each item.

Holds—Shows details about any active holds the user may have.

Suspensions—Not currently in use.

Additional Notes:

Modify User

The Modify User wizard allows you to change information about a borrower. When you first click the wizard, you may see a screen like the one below: (When working with most of the wizards throughout Workflows, in certain screens you can search for a new user or item, or click to select the "current" one, as shown here)

If you enter a new ID, then you must click the "Get User Information" button.

Once you've selected a borrower to modify, you will see a window with various tabs. Note that the User ID and name appear at the very top of the screen, underscored with a dotted line. (Throughout Workflows, text with dotted underscoring indicates a glossary. Clicking on these links take you to more information.)

Note that the borrower's address information appears in the upper right of the window. This is the same info in the first address found in the Addresses tab.

Basic Info—allows you to edit the name fields, User ID, home Library and Profile name.

Privilege—allows editing of the privilege expiration date, PIN, Status, and Claims returned counter. Some of these require a staff override to make a modification. Most of these are rarely if ever modified by staff. The exception is the PIN. The privilege expiration date can be modified here. The diamond-shaped object next to the Privilege expires and Claims returned boxes, and found throughout Workflows, are called *gadgets*, and will pop open a window such as a calendar or a drop-down menu, where specific selections can be made.
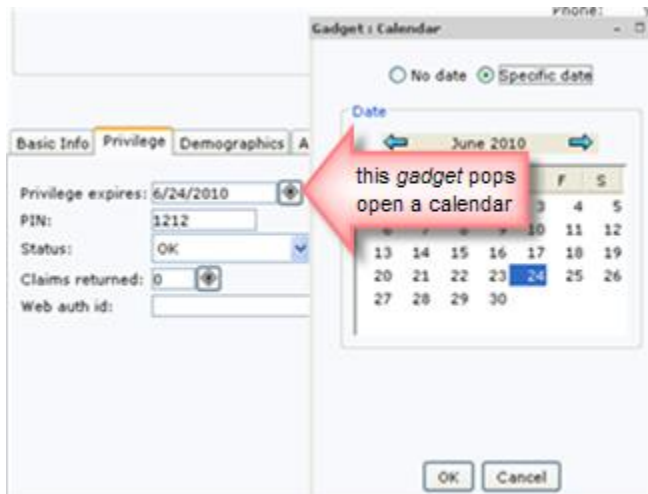
Demographics—Here you can use drop-down menus to edit the various User category fields, known as User cats. The important User cats are 1 and 2—they are used to collect usage statistics that your library will use for their own records and can be used to report to various other agencies. There is also a calendar gadget for setting a birth date, if your library collects that information for underage borrowers.

Addresses—Notice that this window is long and scrollable. It is possible to add 3 different addresses in this tab. In PALS Plus, Address 3 is never used. Address 1 is for the primary address, and Address 2 is used for special circumstances such as the Courtesy borrower, to indicate the place of employment or school.

Edits to these fields can be made as usual, by highlighting the text and typing over it, or inserting the cursor and adding text where needed.

However, if you need to remove the text altogether and just leave a blank line, you must use the Delete Row helper:

To use this, put the cursor anywhere in the line to be removed, and then click the helper. The field and the pull-down label will disappear. When you exit the record and re-enter it, the label will be present but the line will be blank.

Extended Info—here is where you can add or edit information such as a guardian's name to a child's record, or notes or comments, a driver's license if your library collects that info.

Use of other fields under this tab:

SSN: PALS Plus does not recommend collecting the social security number.
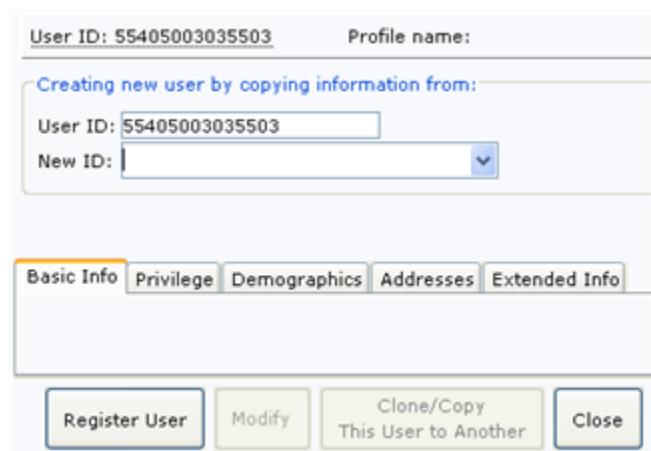Birthdate: This is best recorded or edited with the calendar gadget under the Demographics tab
PREV_ID and PREV_ID2: These fields are not editable. When a borrower's ID is marked lost, it appears here for future reference.

Additional Notes:

Copy User

Use this time-saving wizard when registering more than one member of the same family. Once the first member is registered with the User Registration wizard, you can move on to this wizard to copy all the standard information to the new user record(s). You will be asked to search for the initial user, and then to copy the new user from that initial user. As you create the new records based on the first one, you will be prompted to enter a new ID number, then you'll click the "Register user" button. After that, you'll find that most of the information imported into this new record will not need to be changed. You can change certain fields as necessary, such as the name field and birth date if your library collects that data. Be sure to change the profile if you are creating a child's card.

Renew Privilege

Note: Always verify the current address and contact information of the borrower before renewing the privilege. Any outstanding fines or bills should be paid, and lost or overdue items should be returned. When you select the Renew Privilege, you will be asked to either search for the Borrower or scan in a barcode. Once you locate the borrower, you will see their information at the top of the screen, including their expiration date. In the lower part of the screen, the default setting of Normal is selected. Clicking on the "Extend Privilege" button will automatically renew the borrower's privilege for the standard period designated by your library. Under special circumstances, you may change this to a Special privilege period and enter the new expiration date.

Remove User

Under most circumstances, users are purged systematically from the system if they have been inactive for a long period of time. Though not often used, this wizard allows you to find and remove borrowers that are known to be out of the system due to other circumstances. For example, if a user moves to another town outside the PALS Plus service area, they may be removed if their record is clear. Simply locate the user by using the User Search helper or by scanning their card, if present.

If the user's status is OK and there are no outstanding items or bills, such a user may be removed in this way. Check the summary screen near the bottom for this information, as shown: