User Details

The User Details screen appears as follows:

Enter information into the following fields (required fields have an asterisk next to the label):

User ID:	Either leave this blank to have an automatic number assigned once the record is saved, or enter your own ID number
Type:	There are four possible types of user: • Temporary - this is automatically assigned when a temporary user is created during the loans process. No password is assigned for this type, so that the user cannot log in. • Fictitious - these might be other libraries, so that you can assign copies to be for example In Transit to another library • Normal - this is the standard type • Guest - used for OPAC users so that they can make requests. No password is assigned for this type, so that the user cannot log in. The default is **Normal**.
Status:	The status of the user - the default is Active, but you can select Inactive from the drop-down list if appropriate ⓘ Note that this is just a label - it has no effect on how the user interacts with the system.
Username:	You can either leave this blank to have the system assign a username when the record is saved, or enter your own choice of username. This can be the user's email address if required.
Password:	Once you have entered a username, you can either leave this blank to have the system assign a password when the record is saved, or enter your own choice of password ⚠ Passwords are encrypted, so you cannot tell what a user's password is, you can only overwrite it If you leave the password as assigned by the system, when the user first logs in they will be prompted to change the password. If you assign your own password to them, this will not happen.
Title:	User's title, eg Mr, Mrs, etc
First Name:	User's first name
Short Code:	Unique short code - this could be the user's initials
Surname: *	User's surname
Room Number:	User's room number
Extension Number:	User's phone extension
Email Address:	User's email address, to which all emails from the application will be sent ⚠ Note that you cannot assign the same email address to more than one user. If you try to, you will get an error message:
Office:	The default office is automatically assigned. To assign a different office, click on the **Select** button. Select either an office or a sub unit and click on the **Select** button to close the window and paste the entry into the field. ⓘ *Offices and Sub Units are defined in Infrastructure Maintenance (Offices)*
Job Title:	User's job title

Category:	Broad category for the user, such as Doctor, Nurse, Student.
	Eventually this field will have a validation list associated with it, but for now it is a free text field.
Barcode:	Barcode for the user which may be on a user card.

When you have finished, click **Save** in the Actions menu.

⚠️   Note that you cannot save the record until you have assigned either a password or an email address.

ⓘ   *You can set the system to* send an email *to the user telling them how to access the system, with their username and password.*

The edit screen is re-displayed, with the following information now added:

- User ID and Username - the Username can be changed
- For Fictitious and Normal users, a password box will also have been added, with a random password allocated. This can be changed by simply overtyping it.
- The PIN field - enter the PIN number, if PIN numbers are required for self-issue. *This is defined in System Configuration Maintenance (Self-Issue). The number of digits in the PIN number is defined in System Configuration Maintenance (Common Settings).*

Click **Close** in the Actions menu to leave the record, or click on another tab to continue adding information.

🛇   **Caution**! You MUST assign access rights for the user, otherwise they may not be able to use the application as intended: click on the Access Rights tab to do this, after you have saved the record.

Experiencing problems with managing user records? See the Troubleshooting Guide.