

Quickstart Guide to User Accounts in WISCAT

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To Add a User

1. From the **User Administration** menu, select **Add a User**, the Add a User Account screen displays.
2. Enter a name for the new user in the **Username or Barcode** text box such as a library card number, lunch card number.
The Username or Barcode can contain any combination of alphabetic and/or numeric characters, and the underscore character "_". Do not include spaces in the Username or Barcode.

For staff user accounts, the person's first name is recommended as the Username.
3. Enter a password for the new user in the **Password** and the **Confirm Password or PIN** text boxes.
The Password can contain any combination of alphabetic and/or numeric characters, and the underscore character "_". Do not include spaces in the Password. Enter the password in *exactly* the same way in both text boxes.
4. If appropriate, enter a reminder question related to the user's password in the Reminder Question text box.
5. Enter the user's **first name, middle initial (if desired), and last name** in the First Name, Middle Initial, and Last Name text boxes. This is required information on the ILL request form.
6. Enter the mailing address for the user using the Address1, Address2, City, and Zip text boxes, and the State (optional) using the drop-down menu.
7. Enter the **e-mail address, telephone number(s), and/or fax number** for the user in the E-Mail, Home Phone, FAX, and Work Phone text boxes. This is required information on the ILL request form.
8. (Optional) Enter the user's date of birth in the Date of Birth text box.
9. If a Patron Category dropdown menu is present, select the appropriate category.

10. If desired, enter any additional information related to the user in the Notes text box.
11. Select the desired status for the user from the Account Status drop-down menu, either Disable (account is inactive; user cannot log into AGent) or Enable (account is active; user can log into AGent).
12. Assign the user to the appropriate user group(s) using the Group ID checkboxes and radio buttons.
 - Select either the Patron or the Staff radio button.
For Staff users, use the Group ID checkboxes and radio buttons to select one or more staff modes to which the user will be granted access.
13. When all desired information for the user has been entered, click the Submit button to add the new user to your library's database.

If you assigned the user to the ILL Staff, CAT Staff, and/or Statistics group(s), a "permissions" screen displays when you submit the record. Modify ILL Permissions, CAT permissions, and Statistics Permissions as appropriate.

If you assigned the user to the Patron group, it may be necessary to edit the ILL permissions for the user.
14. Click the **OK** button on the status message to close the message and return to the Add a User Account screen.
15. Repeat steps 2 through 14 to add additional users to your library's database. When all desired users have been added, click the Close button to close the Add a User Account screen.

NOTE: To save staff time, user accounts may be created for selected patrons to allow staff to use the Patron Lookup on the interlibrary loan requests the staff create for those patrons. It is not necessary to give those patrons ILL permissions since they will not be logging in to WISCAT to submit their own requests.

To Configure ILL Permissions for Patrons

If your library participates in Interlibrary Loan, you may use the generic "**guest**" user account to enable or disable Interlibrary Loan permissions for *unauthenticated* patrons (no login).

If you wish to change permissions for a specific *authenticated* patron, you must edit the permissions manually in his/her account.

1. From the Edit User Accounts list, click the **Username** link of the user for whom you wish to edit ILL Permissions (to edit ILL permissions for *unauthenticated* users, select the **Username** "guest"); the Edit User Account screen displays.
2. Click the **ILL Permissions** link; the ILL Permissions screen displays in an *additional* browser window.
3. Use the checkboxes to select the permissions you wish to grant to the user.

A checkmark in the checkbox indicates the user is *granted* the associated permission. An empty checkbox indicates the user is *denied* the associated permission. Clicking the checkbox next to a permission will toggle it on and off.

- To allow the user to submit ILL requests for returnable items, select the **Originate borrow requests** checkbox.
- To allow the user to submit ILL requests for nonreturnable (copy) items, select the **Originate copy requests** checkbox.
- To allow the user to track their in-process ILL requests, select the **Patron request tracking** checkbox.
- If allowing Patron request tracking, the **View own request** permission must also be selected.

4. Click the **Submit** button on the ILL Permissions screen to save your changes.

5. Click the **Close** button on the Edit User Account screen.

To Configure ILL Permissions for Staff

1. From the Edit User Accounts list, click the **Username** link for the staff user for whom you wish to edit ILL Permissions; the Edit User Account screen displays.

2. Click the **ILL Permissions** link; the ILL Permissions screen displays in an *additional* browser window.

3. Most staff permissions are pre-set, use the checkboxes to change the permissions you wish to grant to the user.

A checkmark in the checkbox indicates the user is *granted* the associated permission. An empty checkbox indicates the user is *denied* the associated permission. Clicking the checkbox next to a permission will toggle it on and off.

- **Approve a request** - Staff is authorized to approve ILL requests that stop in Awaiting Approval status in the Status Browse
- **Automatic approval** - Any ILL requests submitted by the staff user will be approved and automatically go out to potential lenders
- **Cancel/Change request** - Allows the staff user to cancel any request made by his/her own library (Borrower), or to update fields on a request made as the Borrower library.
- **Change any library** - Do **NOT** select this option.
- **Change own library** - Allows the user to update the participant record for their own library; allows the user to access the Reports and Download feature for their own library.
- **Originate borrow requests** - Allows the staff user to submit ILL requests for returnable items.
- **Originate copy requests** - Allows the staff user to submit ILL requests for nonreturnable (copy) items.
- **Patron request tracking** - Ignore, this does not apply to staff user.
- **Respond to request** - Allows the staff user to process ILL requests.

- **View own request** - Allows staff user to view and track *all* ILL requests. If this permission is denied, staff user *will not* be able to view requests in the Status, Title or Patron Browse modes.

4. Click the **Submit** button on the ILL Permissions screen to save your changes.

5. Click the **Close** button on the Edit User Account screen.

To Edit a User Account

1. From the **User Administration** menu, select **Edit User Accounts**, the Edit User Account screen displays.

2. Click the Submit button (in the orange bar) on that screen to view all existing user accounts for your library.

3. Find the user account to be edited; click on the Username to view the account information and to edit it or disable the account (user is not allowed to log in to WISCAT until the account is enabled by staff) or alter the ILL permissions.

4. When all editing of the user account has been entered, click the Submit button to update the information.

5. The *Username or Barcode* **cannot** be changed. A new user account must be created with the new Username or Barcode.

To Delete a User Account (permanently)

1. From the **User Administration** menu, select **Edit User Accounts**, the Edit User Account screen displays.

2. Click the Submit button (in the orange bar) on that screen to view all existing user accounts for your library.

3. Each user account has a **Delete** button associated with it on the far right of the screen. Find the user account to be deleted and then click on the relevant Delete button. If deleted, an account cannot be restored. If an account is deleted by mistake, it is necessary to create a new account (see the Add a User section above).

To Configure Patron Categories (optional)

1. From the **User Administration** menu, select **Patron Categories**, the Patron Categories screen displays.

2. On that screen click on **Add A Category** (button in the gray/blue bar beneath the orange bar).

3. When the Add Patron Category screen displays,

- enter a number in the Sequence textbox; this number is the order the category will appear in the Patron Category dropdown menu.

- enter a name for the category (e.g., Patron, Homebound, Sci-Fi Book Club, etc.)
- click on the Submit button

4. A category name can be changed or made inactive (not display on the dropdown menu) by clicking on the Edit button associated with the category.

To Merge Patron Categories

1. On the Patron Categories screen, click the **Merge Categories** button; the Merge Patron Categories screen displays in an *additional* browser window.
2. Select the Patron Category you wish to *merge into* another category from the **Edit patrons with Category** drop-down menu.
3. Select the Patron Category *into which* you wish to merge the previously selected category from the **Change to Patron Category** drop-down menu.
4. Click the **Submit** button on the Merge Patron Categories screen to merge the selected Patron Categories.

To Set a Maximum Number of Active ILL Requests allowed for a patron assigned to a category

Note: This feature is on the ILL Administration menu **not** on the User Administration menu

1. From the **ILL Administration** menu, select ILL Request Limits; that screen displays.
2. **IMPORTANT:** The “0” (zero) means *unlimited* ILL requests. Any category may be set at 0 if you wish; however, the **Default** user category **must** always be set at 0.
3. Enter the maximum number of requests in the ILL Limit textbox for the Patron user categories you have created. Remember, **0 = unlimited**. Click the Submit button. Your chosen categories will appear in the Patron Categories menu in a user account.

NOTE: An ILL request is considered “active” from the time it is created until the request is updated to *Check In* status by the Lender. A copy request is active until the Borrower updates the request to *Received* status.