

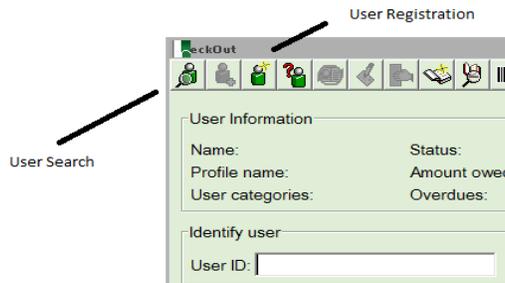
### 3. SYMPHONY CIRCULATION – USER RECORDS

#### 3.1 USER REGISTRATION

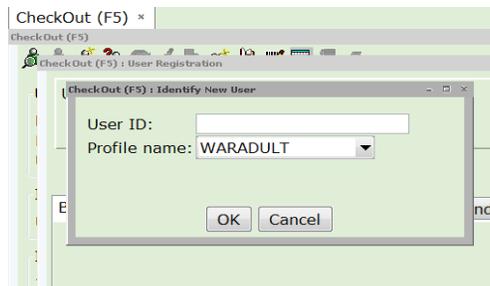
ANSER libraries should always check to make sure a user record does not already exist for a patron record.

**ANSER Policy: Each patron (adult and juvenile) shall have one library card issued by his home library which must be presented for all Direct Access transactions.**

The Symphony User Registration wizard does not contain a helper that would allow you to browse the user name file. So to register new patrons, instead of heading first for the User Registration wizard, instead we want you to start in the Checkout wizard. The Checkout wizard has Helpers for both User Search and User Registration, so that makes it easier to check for an existing record before you start to create a new one.

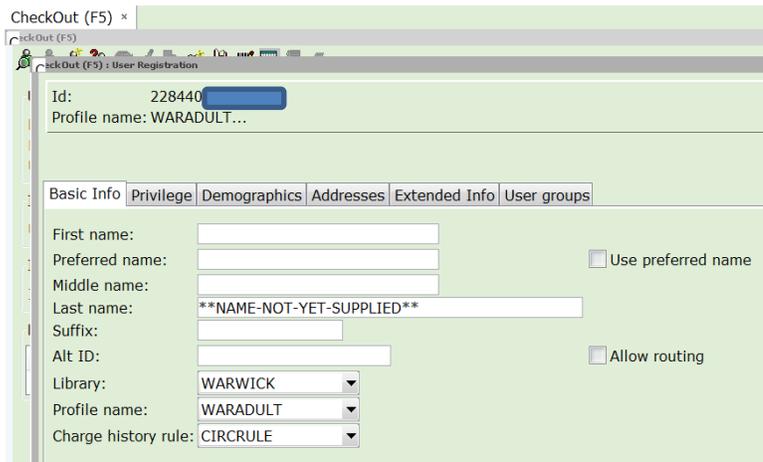


Open Checkout, then click on User Search helper. Confirm the patron is not already in the database. The user list screen displays phone numbers and birthdates that could help to establish whether a record already exists. Assuming there is no match, close User Search. Now it is OK to register the patron. Open the User Registration Helper (in Checkout).



Enter an unused patron barcode number in the User ID field. Select the appropriate user profile from the drop-down menu. Appendix 4 of the ANSER manual provides guidelines on the appropriate use of the different user profiles. After entering a barcode and selecting a profile, click on OK.

NOTE: The xxxNOCIRC user profile is intended for Internet-only cards needed for Envisionware. Because Symphony rules are set to disallow circulation/holds by xxxNOCIRC users, there is no need for strict compliance with ANSER standards for ID or collection of full contact information. Libraries may opt to allow or disallow use of an Internet-only card from one library as an Internet-only card at their library.



The screenshot shows a web browser window titled "Checkout (F5) x" with a sub-window "Checkout (F5) : User Registration". The form displays the following information:

- Id: 228440
- Profile name: WARADULT...

The "Basic Info" tab is selected, showing the following fields and options:

- First name: [text input]
- Preferred name: [text input]  Use preferred name
- Middle name: [text input]
- Last name: \*\*NAME-NOT-YET-SUPPLIED\*\*
- Suffix: [text input]
- Alt ID: [text input]  Allow routing
- Library: WARWICK (dropdown)
- Profile name: WARADULT (dropdown)
- Charge history rule: CIRCRULE (dropdown)

This will bring you to the "Basic Info" tab of a new user record form. The Library, Profile Name, and Charge History rule fields will be defaulted. The required field on this tab is the Last name. Preferred name means Nickname. If you enter a preferred name and leave the "Use Preferred Name" box checked, then the nickname will be used on reports and mailing addresses. Suffixes would be Jr., Sr., III, etc. We do not have a field for title prefixes (Dr., Mr., Ms., etc.) so those should not be entered. We do not want libraries to enter anything in the Alt ID field that would be useful for Identity Theft: no Social Security numbers, no Drivers License numbers.

Names should be entered in mixed case format (not in ALL CAPS). The reason for this is that mixed case makes eye scanning a column of patron names slightly easier. When printed on postal address lines, post office scanners do not read name lines: they scan bottom to top looking for zip, state, city, and street addresses.

The Charge History rule has 3 possible options: The value CIRCRULE appears as the default when registering a new user. Charge History is a feature in Symphony that can allow a library patron to keep a historical record of all the titles they have ever checked out. That list of titles appears in the Display User wizard in WorkFlows; or in the Enterprise catalog as part of the user's My Account information. Keeping a Charge

History record involves asking library patron's to make a choice, and alerting them that these library records are subject to subpoena by a court order. By ANSER policy, this choice should not be offered to library patron's under 18 years of age.

CIRCRULE—Leave this as the default for ...YOUTH profile users. This value will cause the system to NOT keep a Charge History AND ALSO will not present any prompts in Enterprise that offer a choice to turn it on.

NOHISTORY—Use this as the value for new ...ADULT users. This value will cause the system to NOT keep a Charge History BUT will present a prompt in Enterprise that would allow a user to turn it on.

ALLCHARGES—Use this only for ...ADULT users who have been informed of this option and of its library record privacy implications, who still would like to have their list of checkouts kept. Having staff set this option is an alternative to having the patron turn it on themselves in Enterprise.

The screenshot shows a web browser window titled "User Registration (F11)". The main content area displays the registration details for a user with ID 768967806 and profile name WARADULT... Below this, there are several tabs: "Basic Info", "Privilege", "Demographics", "Addresses", "Extended Info", and "User groups". The "Privilege" tab is currently selected. It contains the following fields:

- Privilege expires: A dropdown menu set to "NEVER".
- PIN: A text input field containing "CHANGEME".
- Status: A dropdown menu set to "OK".
- Claims returned: A text input field.
- Web auth id: A text input field.

Each of the PIN, Status, Claims returned, and Web auth id fields has an "Override:" label followed by an empty text input field.

After completing the field entry on the Basic Tab, click on the Privilege tab. The Privilege tab contains fields for the expiration date of the registration ("Privilege Expires"). Most ANSER libraries will have this set to NEVER for adult and youth resident cards, but some libraries do expire cards after 2 years. If the User Profile was set to a ...TEMP, ...PAYCARD, ...NOCIRC, ...VISITOR, or ...TEACHER profile, the expiry date would be automatically set according to ANSER guidelines (Appendix 4 of the ANSER manual).

The PIN field is a password used by patrons to log in to Enterprise, Overdrive, Envisionware, etc. ANSER has the default value set to CHANGEME to remind staff that they should fill out this field. We recommend using the last 4 digits of the patron's home phone as the PIN. But the patron could be asked if they want the PIN set to a different value. [In Enterprise, patrons can change their PIN on their own—if they

have first logged in with their existing PIN.] If the PIN field is changed at all in WorkFlows, the system will require an override password.

Newly created user records will have a User Status of OK. BAD\_EMAIL, BAD\_STREET, and BAD\_PHONE, are statuses that can be applied to new user records if crucial contact information was not supplied by the patron. The status CARD\_PEND could be applied if the user registration process has not been completed, i.e. the patron has not yet shown adequate ID according to ANSER policy. Changing a Status from OK to a different status requires an override password.

**ANSER Policy: Acceptable forms of personal identification for a library card conferring Direct Access privileges:  
Current New York State driver's license, or current photo-identification card issued by NYS Dept. of Motor Vehicles, or other current photo-identification card that contains the individual's name and current home address, or other current photo-identification card that contains the individual's name and a recent piece of mail (such as a utility or telephone bill) that shows the individual's name and current home address. (A college dormitory is not considered a resident home address.)**

The next tab, Demographics, has fields that each library needs to generate reports for their State Annual Reports.

--User Category 1 indicates whether the user is a Resident or Nonresident of your library charter district (or was set up for ILL purposes only).

--User Category 2 contains a list of codes that indicate where the patron resides in relation to RCLS charter library districts. Only one code from Category 2 can be used.

--User Category 3 is an optional field used by some ANSER libraries to control access rules employed by their internal Envisionware PCReservation system. No member library should alter the User Category 3 value of a patron from a different library.

--User Category 4 contains a code that indicated the patron's age range.

--User Category 5 contains codes that indicate the notification method to be used to notify the patron of holds to be picked up (not overdue notices or pre-overdue notices, which only look for the presence or absence of an email address). Select EMAIL if they had given you an email address that you inserted in the Addresses tab. Select PHONE if they prefer phone calls. Select PAPER if they prefer mailed notices. Enter TEXT if the patron prefers to receive text messages for hold notification.

Basic Info	Privilege	Demographics	Addresses	Extended Info	SMS Notice	Contact Info	User groups
User cat1:	RESIDENT	User cat2:	GRHWO				
User cat3:	GRHN	User cat4:	50-65				
User cat5:	PHONE						
Birth date:	11/8/1959						
Language:	ENGLISH	Age:	57				

For the birthdate field, enter the date in the format MM/DD/YYYY or use the calendar Gadget indicated by the diamond symbol. If a patron refuses to give an exact birth year, ask for a birth decade and use that as the year (1930, 1940, 1950, 1960, etc.) If the patron refuses to give a birth decade, use the year 1900. Example: 10/03/1900.

The Addresses tab allows you to enter two different addresses and mark one of them as the Primary address. The Primary address is the address to which any mail regarding recent activity from the library would be sent. The non-primary address would be an alternate address the patron has indicated they reside when not active at an RCLS library. The non-primary address would only be used for situations such as: a) a college student boarding in the RCLS area, but maintaining a permanent residence elsewhere; b) a temporary resident who has a local RCLS mailing address as their primary address, but offers their permanent address.

The two different address fields should NOT be used to identify a patron who just has a physical address and a PO BOX address. For these patrons, do one of the following:

- 1) If the physical address and the PO BOX have the same CITY, STATE, and ZIP, indicate the physical Address on the first STREET field and the PO BOX number on the STREET2 field:
  - STREET: 123 MAIN ST APT 5
  - STREET2: PO BOX 333
  - CITY/ST: MIDDLETOWN NY
  - ZIP: 10940
- 2) If the physical address is in a different CITY, STATE, ZIP, then do not indicate it in either STREET field. Instead, add it as a NOTE field:
  - STREET: PO BOX 333
  - CITY/ST: MIDDLETOWN NY
  - ZIP: 10940

NOTE: Physical address: 123 ELM ST, SLATE HILL NY 10973

You will note that the Address field labels have drop-down boxes, but we ask you NOT to change those labels—otherwise you may discover that certain reports and notices will not recognize your changes and will print data in the incorrect order.

The CARE/OF field maybe used to indicate the parent or guardian of a cardholder under 18 years of age. Whatever information is entered in this field will be printed on the first line of a printed address generated for the user.

There are two STREET fields. Enter mailing addresses on Street 1 and Street 2 using USPS conventions:

- Omit all punctuation marks
- Secondary address unit designators, such as APARTMENT or SUITE, should be entered on the same line as the street number and name
- The pound sign (#) should not be used as a secondary unit designator if the correct designation, such as APT or STE, is known
- If the pound sign (#) is used, there should be a space between the pound sign and the secondary number.
- If dual addresses are used, place the Street address in Street 1 and the PO BOX on Street 2

A list of the USPS standard street abbreviations appears in the Appendix 10 of the ANSER Manual.

Note that the City/State field in Symphony is a free-text field. You must spell out the entire city name. Use standard 2-letter USPS state abbreviations.

Field Label	Value
CARE/OF	
STREET	30 WIGWAM DR
STREET2	
CITY/STATE	WARWICK NY
ZIP	10990
EMAIL	putter@rcls.org
PHONE1	(845)555-5555
PHONE2	
SMSPHONE	

Use PHONE1 for the number where the patron prefers to have the library call them. Symphony's automated call system will use the PHONE1 field only. Use PHONE2 for a secondary phone number, such as a work number

or the non-local home phone number of a college student or temporary cardholder.

Do NOT use the SMSPHONE field to enter Text-messaging numbers. That field is a legacy of a legacy method of text notification. It is no longer used. Instead, follow the instructions further below.

The email address needs to be input precisely. It requires a @ character. Common domains used by ANSER library patrons are gmail.com, aol.com, hvc.rr.com, warwick.net, frontiernet.net, verizon.net, yahoo.com, and optonline.net.

Use the Extended Info tab to enter in notes about patrons. Please enter details about bad contact information (returned mail, removed email addresses, out of service phone numbers, etc.) in the Comments field. Place other patron notes in the Notes field. Symphony will display both Notes and Comments at Checkout.

Do NOT use the NOTIFY\_VIA field to enter hold notification preference. That field is a vestige of a legacy method entering that preference. It is no longer used. See User Cat 5 above instead.

The screenshot shows a web interface for a library system. At the top, it displays 'Id: JPK785436' and 'Profile name: HFLTEMP...'. Below this is a navigation bar with tabs: 'Basic Info', 'Privilege', 'Demographics', 'Addresses', 'Extended Info', and 'User groups'. The 'Extended Info' tab is selected. Below the navigation bar, there are three icons: a left arrow, a right arrow, and a red 'X'. Underneath, the label 'ACTIVEID' is visible. There are five rows of input fields, each with a dropdown menu on the left and a text input box on the right. The dropdown menus are labeled 'NOTE', 'PREV\_ID', 'PREV\_ID2', 'COMMENT', and 'NOTIFY\_VIA'. The 'NOTE' dropdown is currently selected and highlighted in blue.

The SMS Notice Contact Info tab is where you would place information if the patron wants to be notified of holds via text messaging.

Basic Info		Privilege	Demographics	Addresses	Extended Info	SMS Notice Contact Info	User groups
Phone Numbers							
 							
Label	Country	Phone Number	Overdue Notice	Hold Pickup Notice	Bill Notice	Manual Message	User Announcements
Mobile	United States	8455446979	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

1. Click on the **Add Phone** helper icon (the one with the yellow sparkle) on the left side under "Phone Numbers."
2. In box below **Label**, enter "Mobile".
3. Select "United States" as Country.
4. In box below **Phone Number**, enter the patron's text-enabled phone number including area code WITHOUT any spaces or punctuation. (ex: 8455551212)
5. Check the box "Hold Pickup Notice"

\*\*Optional: Check the "Manual Message" box. It allows the option (not yet activated) to give staff the ability to manually send out a text to patron. This option has not been discussed yet by the ANSER Committee and Directors Association and therefore is not available as of July, 2013.

If you need to remove text messaging settings, place the cursor in one of the fields of the existing phone record (in Label, Country, or Phone Number) and then click on the Remove Phone helper (icon with red X). Remember to re-adjust the NOTIFY\_VIA field and to Save your edits.

The User Groups tab is an optional feature that can be used by ANSER libraries to designate Hold Pickup permissions. There are two ways in which Hold Pickup permissions can be automated: 1) Via a note in the Notes field of the Extended Info tab of the user record; or 2) via the User Group feature of Symphony.

**ANSER Policy: The use of Hold Proxy User groups is a local library decision. ANSER cardholders wishing to be in groups must go to their home library to initiate this service. Non-participating libraries do not have to honor Hold Proxy User Groups. Cardholders under the age of 18 may not be included in Hold Proxy user Groups.**

Whether a library uses Notes or the User Group feature, in both cases it is recommended that a signed permission form be collected by the request

patron's home library. An example of this permission form is included in Appendix 15 of the ANSER Manual.

To indicate Hold Pickup permissions via a Note field, enter a note on the user record of both the proxy and the requester indicating that Person X has permission to pickup holds for Person Y. When Person X appears at the checkout and asks for the items being held for Person Y, those items should be checked out on Person X's card and staff should respond to a prompt to cancel the hold for Person Y.



The screenshot shows a web-based configuration form for a user group. The form has several tabs: Basic Info, Privilege, Demographics, Addresses, Extended Info, and User groups. The 'User groups' tab is active. The form contains the following fields and options:

- Group name: KUNTZ-WAR
- Responsibility policy: HOLDPROXY
- Responsibility level: SELF
- Responsibility type: NONE
- Display charges:
- Display holds:
- Checkout holds:
- Remove holds:
- Display bills:
- Pay bills:
- Notice master:
- Allow group choice:

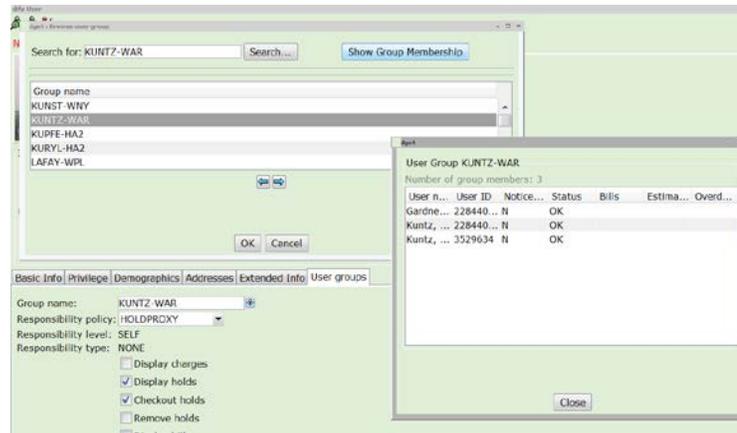
The Symphony User Group feature offers a couple advantages over the Notes method: a) Patrons within the same user group can see in Enterprise both the available and unfilled holds of other members of the group; and b) When Person X checks out an item being held for Person Y, the system does not require staff to respond to a prompt asking if the hold for Person Y should be cancelled. (It cancels the hold automatically and considers it FILLED.) One disadvantage to User Groups is that a patron can only be a member of one group--not multiple groups.

The only field that a staff person would need to adjust on the User Groups tab is to create or select an existing Group Name. All the other fields: Responsibility Policy, Level, and Type—should be left at the default values.

In order for User Groups to be coherent, all libraries should use the same convention when creating a User Group name. The convention we have established is: first 5 letters of the requesting patron's last name, a hyphen, and the ANSER three-letter library code. If a name of a group is already in use, a different group could be distinguished by adding a numeral following the 5<sup>th</sup> letter of the name. Examples:  
KUNTZ-WAR [if the requesting (i.e. homebound) patron's last name is Kuntz and is registered at the Warwick library.]  
SMITH-TUX

## SMITH2-TUX

Before creating a new Group Name, staff should first enter two-three letters of the last name and then click on the Gadget icon next to Group Name to see a list of existing group names listed alphabetically.



If a group is highlighted, you can click on the “Show Group Membership” button to see the users already set as members of that group. With this knowledge, you can determine whether the user record that is being edited needs to be the first person in a new User Group or whether they need to be added to an existing group.

If adding a user to an existing group, highlight the group name and click OK from the group name listing popup screen. If creating a new group, hit Cancel from the group listing popup and enter a new, unique name in the Group Name field of the user record.

After all tabs of a new user record have been filled out, click on Save at the bottom of the screen:



## 3.2 COPYING A USER

From the Circulation module, select the Users wizard group. Click the *Copy User* wizard. Search for an existing borrower’s user record, using one of the available indexes and select **Search**. If you receive a list of users, highlight the one you want to copy and click **Clone/Copy User**. [Alternatively, to find the existing user record you can click Cancel at User Search and scan the existing borrower’s card.]

Copy User : Clone/Copy User

Id: 22844000

Creating new user by copying information from:

User ID: 22844

New ID:

Basic Info | Privilege | Demographics | Addresses | Extended Info | User groups

Enter the new user's barcode in the "New ID" field. The system will retrieve certain fields from the user record being copied. By default it will copy the Last name and all of the Addresses tab information (including Email address, so change or delete if the email differs from the original user).

You will need to adjust the User profile field in the Basic Info tab, as well as add the cloned users' first name. On the Privilege tab, you need to change the PIN. On the Demographics tab, you need to add a birthdate and you may need to adjust the statistical categories, although in most cases those would match the original person's record. Be sure not to skip the Extended Information tab where you would note their notification preferences.

After making the needed adjustments, hit the Save button.

### 3.3 MODIFY A USER

You can use the Modify User Wizard directly from the Common Tasks wizard Group in Circulation, or invoke Modify User using Shift-F11 function key from within the Checkout Wizard (once you had identified a user). The Modify User screen looks and behaves exactly like the User Registration screen.

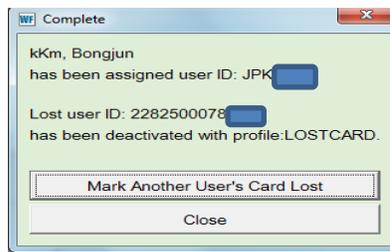
You may change any user record field of an existing patron if they are currently a resident of your library district. If a patron has moved to your district from a different RCLS library district where they had been given a card, you may either: 1) delete their old user record and enter them as a new user; or 2) replace the following elements of the user record:

- User ID (delete old and enter new)
- Library
- Profile name
- User Cat 2
- User Cat 3 (if needed for Envisionware)
- All address fields

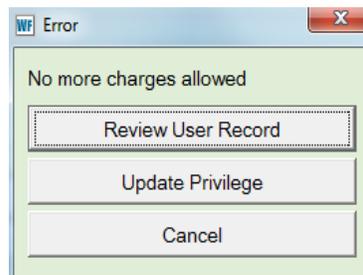
Before issuing the patron one of your cards, if they have outstanding bills or a blocked status at their prior library, they should resolve those issues before getting a new card from any other library. If the user has their old card it is recommended that you collect it from them and discard it.

### 3.4 REPLACE LOST CARD

To prevent another person from using a lost card, mark the user record lost. This process automatically duplicates the user record and creates a new user record with a new User Id. The old user record is retained with a profile of LOSTCARD. This is preferable to simply deleting the old User ID value or an entire user record, since it will alert you to a potential identity theft problem if someone tries to use a lost card. From the Common Tasks wizard group in the Circulation module, select the User Lost Card wizard. It can also be invoked as a Helper from within the Checkout Wizard. Search for the borrower's current user record, using a particular index. Select Search. If a list of users appears, select the correct user name and press the Assign New Card button. Scan the new user barcode, or type the digits into the New User ID field and choose the Assign New Card button.



Once a User has been assign a new number, their old barcode number is automatically transferred to the PREV\_ID field of the User's Extended Info tab in their new User record. If someone tries to use the Lost card at Checkout, the following popup appears:



In the case of Lost cards, the options to Review User Record or Update Privilege will not restore a card to an active status because there cannot be more than one active barcode on a Symphony user record.

The older LOSTCARD user records are kept for a period of one week and are then deleted. If a patron rediscovers their old card and also has their newer card, you would retrieve the old card and discard it. If they offer the old card but now cannot find the newer card, use the Replace Lost Card procedure all over again with the result being that whatever card is in their possession being their active card. Symphony will not allow more than one active card on the same user record.

### 3.5 REMOVE USER

Removing User records from the system is something that will be done automatically each year based on user inactivity. However, there may be occasions where you might need to remove a User record before those scheduled purges. You cannot remove a user record if the user has items currently checked out, active holds, or unpaid bills. If the user cannot be removed because of one of these conditions, an alert window will display. You must address the reason for the alert before you can remove the user record.

To remove a user record

1. In the Users group, click the Remove User wizard.
2. Do one of the following:
  - In the User ID box, scan the user ID.
  - Click the User Search Helper, and search for the user.
  - Type the user ID in the User ID box, and click Get User Information.
  - If the Current button is available, click the button to select the last user that was displayed, modified, or added.

Information about the selected user displays in the Removing User window.

3. Verify that the displayed user record is the record you want to remove, and then click Remove User.



A dialog box displays to verify that the user has been removed.

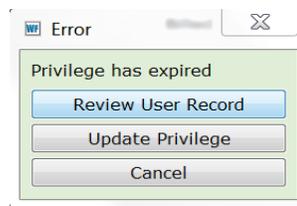
When you have finished removing the user record, select one of the following options:

- Remove Another User to remove another user
- Close to exit this wizard

### 3.6 USER PRIVILEGE EXPIRATION AND UPDATE

Most ANSER libraries have their regular resident cards set to NEVER expire. However, member libraries do have the option to have their resident cards expire in order to force patrons to visit the library. All ANSER libraries have their temporary, visitor, and teacher registrations set to expire after a certain period. To renew their registration, you would either just adjust the Privilege Expires date using Modify User or use the Renew Privileges wizard. The Renew Privilege wizard is used to renew or extend a user's library privileges if a patron presents an expired card at Checkout.

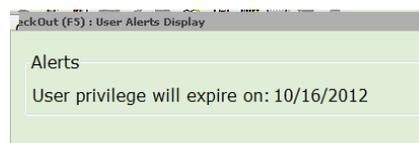
At Checkout, if a patron's user record Privilege Expires date has been passed, an error message will appear:



Always select Review User Record in order to confirm that the patron's contact information and user profile are up-to-date. After confirming and/or adjusting the user record, click on the Extend Privilege button.

Privileges will automatically be extended for a set number of days from the current date as defined by the User Profile that they had been assigned.

If a user has an expiration date that has not yet been passed, but is imminent, an alert will appear at Checkout:



Once you click OK (your only option), Checkout will proceed as usual. You may want to renew their registration before it expires, because **once their registration does expire, their login authentication to the Enterprise catalog or to services like Overdrive or Envisionware will not work.**

To renew their expiration at that point, select the Renew Privileges helper the Checkout Helper menu:



Then check the information that displays for the user before clicking on Extend Privileges:

The screenshot shows a window titled "Checkout (75): Renew Privilege". It contains the following information:

User Information			
Name:	Kuntz, Putter	Status:	OK
Profile name:	WARADULT...	Amount owed:	\$0.00
User categories:	Y	Overdues:	0
Privilege expires:	10/16/2012	Library:	WARWICK
		Available holds:	0
		Note:	Staff RCLS
		Notify user via:	EMAIL
		Previous ID:	3529634
		Previous ID:	352962

Identify User

User ID:

Street: 30 WICKHAM DR  
City, state: WARWICK NY  
Zip: 10990  
Email: jkuntz@rcls.org  
SMSPHONE: (845)544-6979

Privilege info

Buttons: Get User Information, Extend privilege, Cancel

Note that this Renew Privileges screen invoked from Checkout does NOT offer the capability to correct any user record fields. Should you need to do so, you would have to navigate to the Modify User wizard.

### 3.7 USER STATUSES

User statuses were discussed briefly as a field that can be adjusted when a new use is registered. Changing a user status from one value to another requires use of an override password.

The meaning of each status is explained below:

**OK** – User is in good standing with no overdue items or fines

**DELINQUENT** – User has overdue items or unpaid bills that do not exceed the threshold of \$10.00. Checkout can still proceed, and online logins will work

**BLOCKED** – User has unpaid bills that exceed the \$10.00 threshold. Checkout can proceed only with an override password; and online logins (Overdrive, Envisionware, etc.) will not work.

**BARRED** – All library privileges have been manually revoked.

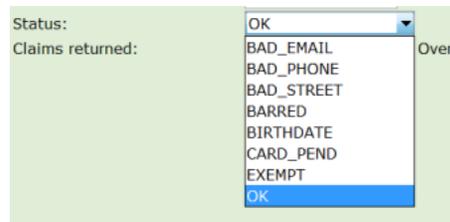
**EXEMPT** – Users will not have their statuses changed to DELINQUENT or BLOCKED by the system based on unpaid bills.

**CARD\_PEND** – Used for issuing new cards where incomplete registration information (usually a lack of proper confirmation ID) exists.

**BAD\_EMAIL** - The email address given by the patron has been identified as not valid.

**BAD\_PHONE** - The phone number given by the patron has been identified as not valid.

**BAD\_STREET** - The email address given by the patron has been identified as not valid.



When changing the status of a user, an explanation is often needed. There is no field directly connected to the User Status field in which to place a comment, but there are Comment and Note fields on the Extended Info tab of the user record.

When using manually-applied statuses such as BARRED, BAD\_STREET, BAD\_PHONE, BAD\_EMAIL, also insert an explanation of the issue in a Comment or Note field. Include your initials, your library code, and today's date.

If you are resolving one of these statuses, remember that in addition to changing the Status field you should also delete the associated Note or Comment.

**NOTE:** When you change a BAD\_EMAIL, BAD\_PHONE, etc. status manually, you are often trying to set the user back to the OK status. One of the quirks of Symphony is that you may not see "OK" listed as a status that you could select. However, if you select DELINQUENT (if it is listed) or BLOCKED (if both OK and DELINQUENT are not listed), when you go to Save the record, Symphony will automatically set the patron to OK if no bills or overues exist.

**NOTE:** When you resolve a BAD-EMAIL, BAD-PHONE, or BAD\_STREET status, in addition to deleting any associated Notes or Comments, you may also need to set the user's NOTIFY\_VIA field to a different value. For instance, if a patron has a BAD\_EMAIL block, to resolve it you would:

1. Insert their correct email address in the email field of the User record
2. Change their status from BAD\_EMAIL to OK (or DELIQUENT or BLOCKED, if OK is not listed)
3. Delete any Note or Comment that refers to their old, incorrect email address
4. Set the NOTIFY\_VIA field back to EMAIL.

### 3.8 STAFF CARDS

**ANSER Policy: The system-wide “no fine” status is offered to presently employed, paid library staff. Library staff may have a card from their home library or if their work library permits from their work location, but not both. Libraries issuing work library cards to staff living in another RCLS district must delete this card when the individual is no longer employed by the library.**

Setting a User Status to Exempt only prevents Symphony from changing the status automatically to Delinquent or Blocked based on overdues or unpaid bills. To stop Symphony from creating any bills, the User Profile must be one that is set by ANSER Administrators to not change fines.

Examples of how to identify library staff are listed below:

--A staff person who resides in the district of Library YYY and also works at Library YYY: the card would be issued by Library YYY with a User profile of YYYSTAFF and a STATUS of EXEMPT. A Note field should be in their user record that reads: “Staff at YYY.”

--A staff person who resides in the district of Library YYY but works at Library ZZZ: the staff person needs to make a choice depending on whether they want hold privileges from their home library or the library where they work.

If they want privileges from their home library, the card would be issued by Library YYY with a User profile of YYYSTAFF and a STATUS of EXEMPT. A Note field should be in their user record that reads: “Staff at ZZZ.”

OR

If they want privileges from their work library, they would surrender and have deleted any home card and a new card would be issued by Library ZZZ with a User profile of ZZZSTAFF and a STATUS of EXEMPT. A Note field should be in their user record that reads: “Staff at ZZZ.”