Webopac Preferences – Profile User Activities
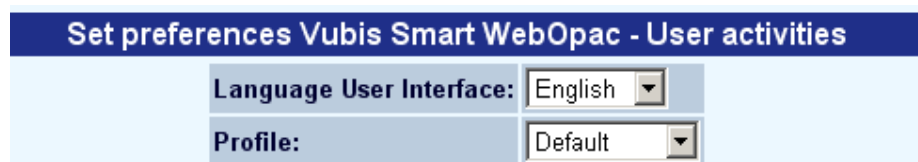
1. Introduction

User activities is the name for the part of the WebOpac where the user can view information about his/her personal data and transactions. A description follows of the options that are available for user activities (but their availability depends upon the library – they can all be disabled).

Note

You should not add user facilities to the Web OPAC that are not offered within the loan module of Vubis Smart. For instance, if no financial information is collected for a borrower, you should not allow them to see the option My Financial History under User Activities in the Opac.

You can define options for each profile and for each language.

- Select the language for the profile from the drop-down menu

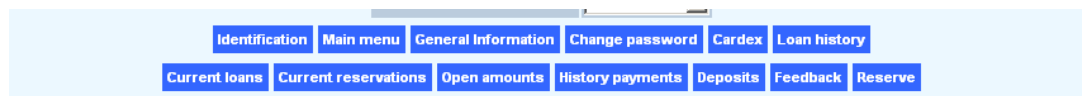- Select the profile for which you want to make the changes

Languages are defined on the Start page.

You can quickly go to a particular section by clicking on one of the index links:

2. Identification

This parameter determines what is required for the user to log in and access his/her details.

Use ASelect for identification	No ▼	
Fields that will be used for identification		
☑	**Library card barcode**	
☐	**Password**	
☐	**Date of birth**	
☐	**Name code**	
Number of minutes before automatic logout in case of no activity	2	
☐	**User must log on before every action**	
Number of characters to be used from first and last name		
Last name	4 ▼	
First name	4 ▼	
Institutions to show in drop down list		

Available options Chosen options

DMS TST   ← →   PNB   ↑ ↓

| Option to save log on data as a cookie	No ▼	

- Specify whether or not ASelect is to be used for identification purposes

A-Select is a framework for authenticating users using underlying 'back-end' authentication systems, such as ip authentication, username/password, RADIUS, LDAP, etc. When the user is authenticated using A-Select, the A-Select system returns to Vubis Smart the username as it is known in the A-Select configuration. This username will typically not be the same as the Vubis BorrowerId of the user. Please contact your account representative for more information.

- Tick the checkboxes to select the requirements for identifying the user. These fields must be completed by the user when they access the Opac User Activities.

- Enter the number of minutes that must elapse before automatic logout in case there is user no activity.

- Determine whether or not a user must log in for every action.

- Enter the number of characters that are to be used from the first and last name of the user. Only applicable if you tick **Name code** as required for identification.

- Determine whether or not login data may be saved as a cookie (not recommended for public terminals).

- Amend any texts.

Sign In Help

```
<h1>Sign In Help</H1> <hr> Barcode: bla bla bla
<br> Name:  4 eerste letters van je familienaam
gevolgd door 4 eerste letters van je
voornaam<br><hr>Please contact the helpdesk ...
```

Sign In

Library card barcode

Date of birth

This barcode is in the process of being replaced. Please consult the

Library card barcode is not entered correctly or does not exist!

Your date of birth is incorrect

Your name code is incorrect

Your password is incorrect

You are not permitted to use SDI.

Forgot pincode?

Institution

Please sign in to gain access to the user activities

Not a valid barcode

Note

When your library has eID (Electronic Identification) enabled it is also possible for borrowers to log in by scanning their eID card. See the separate documentation on eID on eID (in the General section) for more information.

3. Guest login

Borrowers who do not have a borrower card and who have not registered with the library can register on-line and receive a temporary borrower's card.

REGISTER AS GUEST / CHANGE DATA

Borrowers are allowed to register as guest   No

Set whether this option is activated or not.

Available fields

In order for a borrower to be registered, select the fields that are to be filled in for the borrower's registration to be complete.

AVAILABLE FIELDS			Use standard format test	Mandatory field	Show Authority list
↺ Last Name	Delete	Help	☐	X	
↺ Institution/Location	Delete	Help	☐	☑	
↺ First Name	Delete	Help	☐	☑	
↺ Email	Delete	Help	☐	☑	
↺ Phone no.	Delete	Help	☐	☑	

Locations ▾ Add field

Available fields for Register as guest

Available options   Chosen options
                           First Name
                           Last Name
              ←   Email
              →   Phone no.
                           Institution/Location   ↑ ↓

Available fields for Change data

Available options   Chosen options
Last Name
Institution/Location
First Name   ←
Email   →   ↑ ↓
Phone no.

Texts

Modify the texts as required.

Addition for date label	↺ dd/mm/yyyy
Message format error 1 field	↺ The following field is not filled out correctly:
Message format error more fields	↺ The following fields are not filled out correctly:
Error message duplicate user	↺ Our records suggest that you are already registered on the system.
Message error while saving	↺ Something went wrong while saving your data
Error message mandatory fields	↺ One or more mandatory fields are still empty
Note Mandatory fields	↺ Mandatory field
Button Save data	↺ Save
Second verification field for e-mail address	No ▾
Confirm email	↺ Confirm email
Error message confirmation email	↺ You typed two different email addresses

Savelists will be created for the following user(s):

Available options   Chosen options
ABREAS
ACDEWIT
ALBERTG   ←
ALISESTR   →   ↑ ↓
ANITAM

Savelists

The system automatically stores borrowers inscribed through the WebOpac in savelists. These savelists are created for ease of use for library staff and gives them direct access to borrowers newly added through the WebOpac, thus enabling to take actions, in case they wanted to. Furthermore, they can of course use SSP for more detailed overviews and statistics.

The savelist names are constructed as follows.

- They are stored for a library defined user id (one or more).

- Savelist type 1: The name of the savelist starts with the character string "ADDWEB**D**_" followed by the Date (format = YYYYMMDD). Example: ADDWEBD20040910.

- Savelist type 2: The name of the savelist starts with the character string "ADDWEB**W**_" followed by the Week Number (format = YYYYWW). Example: ADDWEBW200412 (week 12 of 2004).

- Savelist type 3: The name of the savelist starts with the character string "ADDWEB**M**_" followed by the Month (format = YYYYMM). Example: ADDWEBM200412 (December 2004).

Specific settings

Modify the texts as required and set various defaults.

Settings specific for Register as Guest	
Text on button on login screen	Register as guest
Titlebar	Register as guest
Introduction message	Introduction message
Closing message	Closing message
Email message - Subject	Register as guest
Email message - Message	L.S., You have been registerd to the library now. Below you find the data that you filled in and the Borrower ID that is created for you and that you can use when communicating
Email message - Usercode	Your BorrowerID is
Email message - Pincode	Your Pincode is
Default Institution for guests	HCPL
Default Location for guests	AC
Default borrower category for guests	Adult Users
In order to prevent existing borrowers to register as guest, the system will search for a match on name and email address. You can also define a third field that should be different if name and email address are equal e.g. date of birth.	
Third field for control	< No third control field >

Existing borrowers are allowed to change data

Specify whether or not existing borrowers are allowed to modify their own details.

Existing borrowers are allowed to change data Yes

Modify the texts as required.

Settings specific for Change Data			
Button in User activities	Change data	Style class	listbuttons
Titlebar	Change data		
Introduction message	You can change the data if necessary		
Closing message	Data have been changed		
Email message - Subject	Confirmaton of changed user data		
Email message - Message	You changed the following data with the Web catalogue of the library		
Message about sent email	A confirmation email message is sent to you		
Error message user record locked	It is currently not possible to change your user data		

4. Main menu

Use the next section to determine the wording for each of the options seen by the user when they have logged in using the User Activities option through the WebOpac:

MAIN MENU USER ACTIVITIES	
Titlebar main menu	USER ACTIVITIES
*	My VUBIS
*	My personal information
*	Change my password
*	My cardex
*	My save list with bibliographical descriptions
*	Alerting services
*	Loan Information
*	My loans, with possibility of renewal
*	My loan history
*	My account
*	My financial history
*	My reservations
*	Suggestions/Order
*	Feedback

- My personal information:

- This will display various pieces of user information such as name, address, etc. based on the site's customisation of this option.

Note

The way the name of the logged in user is displayed in the title bar of the WebOpac is determined by the settings in AFO 482 - Borrower Name Setup - "Display".

- Change my password:

  - If the user access is granted by password (or PIN) then the site can allow this option to have the user change the system-generated password. This password will follow the rules setup in Vubis Smart.

- My cardex:

  - If the serials module is in use, borrowers can mark titles that they are interested in and have a list of last received issues and the next expected issues.

- My save list with bibliographical descriptions:

  - If a user is logged in when marking records, these will be saved on the Vubis WebOpac server and can be retrieved at any time.

- Alerting services:

  - This is access to the SDI (Selective Dissemination of Information) where users can create automated selects on the database which are e-mailed to the user.

- My news:

  - This option is not yet implemented.

- My loans, with possibility of renewal:

  - This will list the current loans for the user as well as mark all items that can be renewed based on the Vubis Smart settings.

- My loan history:

    - This will show a count of all items checked out, renewed and reserved along with overdue notice counts. In addition, any loans with the loan history saved will also display.

- My account:

    - This will show all outstanding amounts owed by the user.

- My financial history:

    - This will show all fines and fees that have been processed in the past (if the relevant parameters have been set in Vubis Smart).

- My reservations:

    - This will show all the current reservations for the borrower along with their status'

- My "Lenen Loont":

    - Option reserved for the Dutch market.

- My deposits:

    - This will show the deposit information for the borrower.

- Feedback:

    - This will allow borrowers to e-mail the site with comments.

My catalogue

Use this section to determine which of the available options will be displayed to the end user – select items on the left-hand side and move them to the right and then re-order as necessary:

5. General information

Use this section to determine what pieces of borrower information will be displayed to the end-user. You can first determine which blocks of information are available. Next you can determine for each block which specific lines will be shown.

GENERAL BORROWER INFORMATION

Sections of information to show

Available options		Chosen options	
	← →	Barcode Identity Home Address Locations Address 2	↑ ↓

Fields to show per section

Barcode

Available options		Chosen options	
	← →	Barcode	↑ ↓

Identity

Available options		Chosen options	
	← →	First Name Last Name Borrower Type	↑ ↓

Home Address

Available options		Chosen options	
	← →	Street No. Street (Cont'd) City	↑ ↓

Locations

Available options		Chosen options	
	← →	Institution/Location	↑ ↓

Address 2

Available options		Chosen options	
	← →	Street No. City	↑ ↓

6. Change password

This allows for the modification of text displayed when a borrower attempts to change their password:

CHANGE PASSWORD

↶	Change
↶	Your password is changed
↶	Unknown error occured during password change
↶	Old password is incorrect
↶	New passwords do not match
↶	New password cannot be blank
↶	CHANGE PASSWORD
↶	Enter new password
↶	Confirm new password
↶	Enter old password

7. Cardex

This allows you to define the fields that maust be shown when a user selects the Cardex
option:

CARDEX

Fields to show

↶	Issue
↶	Expected
↶	Received
↶	Status
↶	Status date
↶	Part title
↶	Public note

Available options   Chosen options

| | ← → | Issue
Expected
Received
Status
Status date | ↑ ↓ |

As well as status texts:

Status texts

↩	Received
↩	Returned
↩	Claimed
↩	Next expected issue
↩	Next expected index
↩	Next expected supplement
↩	Missing

And other texts:

Other texts

↩	ISSN
↩	Institution
↩	Issue information
↩	Issues
↩	Maximum issues
↩	Save changes
↩	Save in personal cardex
↩	Title

8. Loan history

This allows for the modification of text and options when a user selects the loan history option:

LOAN HISTORY

Summary loan history

↶		Abnormal return	
↶		Total loans ever recorded	
↶		Date last loan	
↶		Number Of Claims	
↶		Reservations ever recorded	

Available options

Abnormal return

Chosen options

Reservations ever recorded
Total loans ever recorded
Date last loan
Number Of Claims

General options

☐ Borrower can enable use of loan history for mailings

Texts and messages

| ↶ | | Use loan history for mailings |
| ↶ | | Save |

As well as for the details of the loan history:

Details loan history

↶		Title	
↶		Volumenr.	
↶		Last check out date	
↶		Intern number	

Available options

Chosen options

Title
Volumenr.
Last check out date
Intern number

9. Current loans

This allows for the modification of text when a user selects the current loans option. You can also specify here whether or not a user is allowed to renew his/her own materials currently on loan.

CURRENT LOANS

Fields to show

↶	Object
↶	Title
↶	Type
↶	Check out date
↶	Due date
↶	Location
↶	Number of renewals
↶	Amount due for renewal
↶	Overdue fine

Available options		Chosen options		
	← →	Object Title Type Check out date Due date		↑ ↓

Show renewal button: Yes

Free text

Header text	
Footer text	

As well as modifying the texts that go with renewals.

Other texts current loans

↶	Current loans
↶	Renewal cost
↶	Amount of objects to extend
↶	Skip renewal
↶	Renewal
↶	Renew selection
↶	Renew all

10. Current reservations

This section allows for the modification of text and options when a user selects the Current Reservations option:

Free text	
Header text	
Footer text	

Other texts current reservations	
↶	Current reservations
↶	Confirm modification(s)
↶	Delete selected reservations

Show button for reservation removal/change: This will activate or suppress the ability to modify or delete the reservations.

11. Open amounts

This section allows for the modification of text and options presented when a user selects the My Accounts option. You can also specify here whether or not a user is allowed to make payments by credit card.

12. History payments

This section allows for the modification of texts and options when the My Financial History option is chosen:

13. Deposits

This section allows for the modification of texts and options when the My Deposits option is chosen:

14. Feedback

This section allows you to specify various texts related to the Feedback option:

15. Newsfeeds

RSS news feeds can be integrated in two types of WebOpac sessions: anonymous and private sessions. In anonymous login sessions, the system does not know who is sitting in front of the screen. In private login sessions, the user of the system has identified him self and the system knows who is sitting in front of the screen.

Both for private and anonymous sessions the preferences are defined as part of the User Activities. For a private session this is obvious: the user can select his preferred news channels by logging in and selecting the channels as part of the User Activities.

To enable this for anonymous sessions, the system allows the definition of a so-called "pseudo-borrower". This is a borrower that can be linked to a WebOpac profile. The standard User Activities can then be used to define the RSS channels for the profile by identifying the pseudo-borrower to access "his" User Activities..

In the preferences you can change the texts but also you can define a "pseudo-borrower" for which the news feeds are displayed when you do not logon (i.e. for anonymous WebOpac sessions).

NEWSFEEDS

Institution and barcode for unregistered borrower

Institution	PNB > ▼
Barcode	200399115X

Texts and messages

↺	MY NEWS
↺	Cancel
↺	Channel
↺	Feeds to show
↺	Language
↺	RSS CHANNELS
↺	Save
↺	News

Free text

Header text	Select here the RSS channels. The feeds of the channels will be displayed on the bottom of the search screen
Footer text	For additional help, please contact your branch

Licence information

Note that the RSS integration feature is not a standard part of the Vubis Smart application. It requires a specific license and must be installed and activated separately. Please contact your account manager for pricing and installation information.

16. Reserve

The first section allows for the modification of pickup locations:

See the Help on AFO 481 – WebOpac – Reservations – Miscellaneous for additional information on the effect of reservation area parameters.

The next section allows for the modification of text and options during a reservation:

Reservation form

↺	Estimated availability date
↺	Reservation location(s)
↺	Pickup location
↺	Maximum reservation date
↺	Pickup message by e-mail
↺	Pickup message by SMS
↺	Pickup message by post
↺	Total reservation costs

Available options

Estimated availability date
Reservation location(s)
Pickup message by SMS
Total reservation costs

← →

Chosen options

Pickup location
Maximum reservation date
Pickup message by e-mail
Pickup message by post

↑ ↓

The next section allows for the modification of help messages when placing reservations:

Free introduction text for reservation fields

Estimated availability date	
Reservation location(s)	
Pickup location	
Maximum reservation date	
Pickup message by e-mail	
Pickup message by SMS	
Pickup message by post	
Total reservation costs	

Help texts for reservation fields

Estimated availability date	
Reservation location(s)	
Pickup location	
Maximum reservation date	
Pickup message by e-mail	
Pickup message by SMS	
Pickup message by post	
Total reservation costs	

Texts and messages

↩	Reservations
↩	OK
↩	All locations
↩	Cancel
↩	Make reservation
↩	Select volume
↩	Volume
↩	You've reached your limit number of reservations !
↩	You didn't select a location !
↩	Login required to proceed !
↩	This record doesn't exists !
↩	No reservation possible
↩	You didn't select a volume !
↩	Your reservation has been accepted !
↩	No valid date(s) of maximum reservation
↩	Maximum reservation date is in the past

In the last section you can define texts for email and SMS messages related to reservations.
Also the size of the popup screen for placing reservations.

Texts for e-mail messages	
Subject notification	
Notification header	
Notification footer	
Subject confirmation	
Confirmation header	
Confirmation footer	
Pickup location	Pickup location

Texts for SMS messages	
Subject notification	
Notification header	
Notification footer	
Subject confirmation	
Confirmation header	
Confirmation footer	
Pickup location	Pickup location

Size of the reservation window in pixels	
Height	400
Width	600

Note

Always remember to click the **Save changes** button to save any changes you have made.

Save changes

- **Document control - Change History**

Version	Date	Change description	Author
1.0	June 2006	creation	
2.0	September 2006	Minor modifications Delivered as part of build 17 updates	
3.0	April 2007	new options in reservations, cardex, feedback; updated doc hyperlink; updated user name display info; updated RSS info	