

Assisting Library Users with their I-Share Accounts and the VuFind Union Catalog

The options available to I-Share library staff for helping library users with their accounts have changed with the implementation of the VuFind union catalog. The procedures listed below provide staff several alternatives for providing users with account assistance. Your library may wish to use one or more of these methods depending on the type of assistance that is needed.

If a library user has forgotten their VuFind password or username:

Click on the "Forgot Your Password?" link on the VuFind login page, and enter the email address that you entered when you created your VuFind username. VuFind will send you an email containing your username and a generated password. You will want to copy and paste the new password into VuFind to log in, and then in the User Account section immediately change your password to something you will be able to remember.

If you do not remember your username or do not receive the reset-password email (for instance, if you no longer have access to the email account you entered in your VuFind account), you can simply create a new VuFind username. The new username will show the status of everything in your library account, but will not show any tags or favorites associated with your previous VuFind username.

This text is taken from the VuFind FAQ [file:///localhost/at http://www.carli.illinois.edu/mem-prod:I-Share:opac:vf-login-faq.html](file:///localhost/at/http://www.carli.illinois.edu/mem-prod:I-Share:opac:vf-login-faq.html) - reset

If a library user needs help with their account or in placing requests (3 options):

Library staff should always request the library patron's permission to use their library login credentials before using those credentials to perform services on the patron's behalf.

Option 1. Use the patron's credentials in the Classic (or Version 7) WebVoyage interface to your local catalog.

Use the patron's barcode and last name to access their My Account display.

As this option is performed from the local catalog, it will not allow you to place new Universal Borrowing (UB) requests for the patron, but will allow you to assist them with renewals, or explain information that is displaying in the My Account display.

Option 2. Create a library-use VuFind username for assistance.

This method uses a library-staff-use username that can be temporarily associated with any user's account. This option will allow you to place Universal Borrowing (UB) requests on behalf of patrons, in addition to assisting them with renewals or providing other account-related assistance. This option has the advantage over Option 3 of requiring less setup work per use, but it will require staff to be particularly careful to be sure the library-staff-use username is profiled to the correct patron before each use.

Create a VuFind username and password for library-use. The username must be unique across all I-Share libraries, so we recommend using either a barcode number that you already use for library-use, or create a username that begins with your library's three-letter Voyager code and is followed by descriptive text that is easy for you to remember. VuFind will display a message if the username you create is already in use. If you have multiple service points, each should have its own username to avoid simultaneous use: e.g., ARUcircdesk, NIUillstaff, NLUchicago1 etc. Note that the username cannot be longer than 30 characters.

When providing assistance to a patron, log in to the library-use VuFind username, click on "User Account" and temporarily change the Voyager credentials in the "Library Catalog Profile" (barcode and

last name) to those of the patron being assisted. You must click the Submit button to save the changes. Verify that the username has been assigned to the correct patron by clicking on "Contact Information" before proceeding to assist the patron.

Option 3. Create a new VuFind account for each patron being assisted.

This option will allow you to place Universal Borrowing (UB) requests on behalf of patrons, in addition to assisting them with renewals or providing other account-related assistance. This option will require more setup work per use than Option 2 but will create a VuFind username that can be turned over to the patron, and/or used again by staff when helping patrons who request or need ongoing assistance.

The username must be unique across all I-Share libraries, so we recommend that you create a new VuFind account using the patron's barcode as username and the patron's last name as password. Note that this will not disable any VuFind account that patrons may have setup for themselves. If you intend to turn the account over to the patron to use, you may enter the patron's preferred options for username and password, and remind the patron to change the password immediately.

Additional Information:

1. There may be multiple VuFind usernames/passwords attached to a single Voyager account at any time.
2. VuFind usernames must be unique across all I-Share libraries.
3. VuFind usernames cannot be longer than 30 characters.
4. Voyager email notices are sent to the email address used in the Voyager patron record. Using a different email address in the VuFind account will not redirect Voyager email notices to the address in the VuFind account unless the address is also changed in the Voyager patron record.
5. Voyager was designed to allow library staff to track the status of their library's materials while protecting the privacy of the patron's activity with other libraries. Consequently, Voyager does not provide a library staff view of a patron's Universal Borrowing activity. All methods of gaining access to this information are via the patron's public catalog login. Any methods used by staff to gain access to the full view of a patron's UB activity are, therefore, a Voyager "work around" and pose potential privacy violations. Library staff are strongly encouraged to use these techniques only when requested by the patron or for essential library collection management tasks, and to minimize the number of library staff who have access to any patron information.

CARLI VuFind FAQ: <http://www.carli.illinois.edu/mem-prod/I-Share/opac/vufind-faq.html>

CARLI VuFind login FAQ (this is a component of the full FAQ referenced above):
<http://www.carli.illinois.edu/mem-prod/I-Share/opac/vf-login-faq.html>