

Clearing and Working with Users

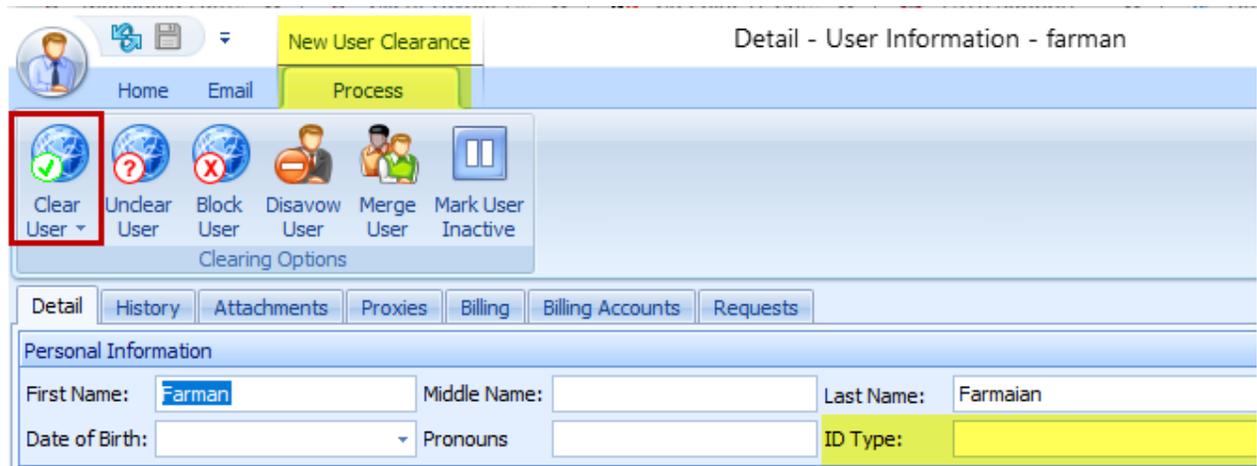
Clearing Users

Individual units may have different requirements for clearing users; make sure to check local policies before clearing a user.

Users only need to be cleared when they come to a library in person. After checking a patron's ID, use the **ID Type** dropdown menu to indicate the type of ID checked and click on the **Save** icon. Then on the **New User Clearance Process** ribbon, click on the top half of the **Clear User** button.

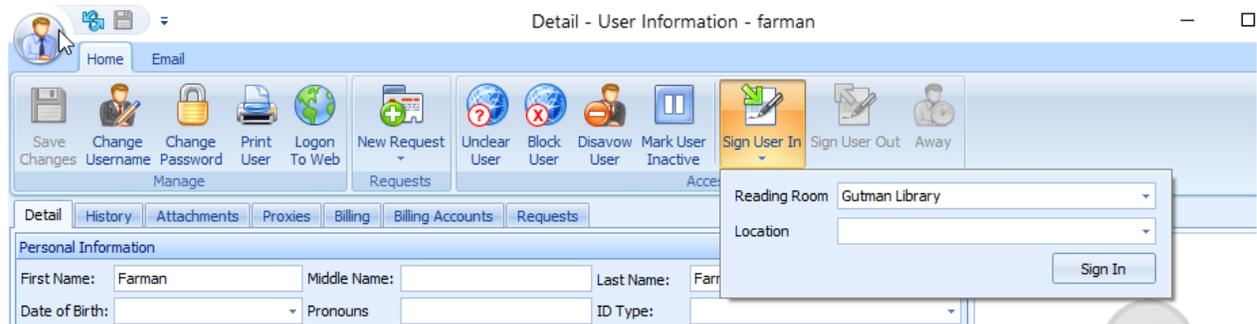
Users only need to be cleared once at a Harvard library and are then cleared for all libraries. User records do expire annually. See the Managing User Accounts section below for more information on user expiration.

Note: Never enter patron ID numbers into Aeon.



Signing Users In and Out of the Reading Room

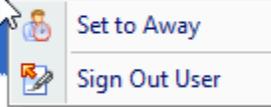
A user must be cleared to be signed into a reading room. Once a user is cleared, click on the Sign User In button on the Home ribbon and select the appropriate reading room from the dropdown menu.



A user who is signed in can be set to **Away** if she temporarily leaves the reading room and her materials have not been returned. To set a user's status to **Away**, right click the user's record in the Signed In Users group and select the **Set to Away** option. To remove the Away status, right click on the user record and select the **Clear Away Status** option. Setting a user to Away keeps her reading room visit open and does not affect her reading room history.

You can also set Aeon to display a clock icon over any who's status is Away. Click on the **Aeon icon**, click the **Options** button, and check the **Show away icon on user image** checkbox.

	Name	Location
[-] Status: Present (2)		
	Farmaian, Farman farman	Gutman Library
	Harvard, John John Harvard	Houghton Reading Room Seat A1



To sign a user out, right click the user's record in the Signed In Users group and select the **Sign Out User** option. You can also open the User's record and click the **Sign User Out** button on the **Home** ribbon.

If you sign a user out while materials are still checked out, you will get an error message. In general, materials should be checked in before the user is signed out.

Managing User Accounts

Username and Passwords

Patrons who register using a HarvardKey will have their 8-digit HUID as their usernames. Patrons who do not have a HarvardKey select their own username. Patrons cannot recover a forgotten username automatically, but staff can look up a username for a patron.

Staff should never reset passwords for patrons. Patrons using their HarvardKey will need to reset a forgotten password through the HarvardKey interface. If the patron did not use a HarvardKey to register, she can reset her own password by clicking on the Forgot Password? link on the HOLLIS Special Request logon page.

Request Limits

By default, all users are assigned the system-wide request limit of 30 outstanding requests. You can increase or decrease a user's request limit by adding a number value in the **Request Limit** field of the user record. You can set the request limit value to any number. Setting the request limit value to 0 give the user unlimited requests. To revert the user's limit back to the system-wide limit, delete the value in the Request Limit field.

User History

The History tab on a user record will show when a patron registered, any updates to the information in her account, any reading room visits she has made, and emails sent from Aeon about her account (including password reset emails).

User Clearance Statuses

No - Users who have registered and not cleared will have a clearance status of No.

Yes - A Yes status indicates that the user is currently cleared.

EXP - A status of EXP indicates that the user record has expired. See below for more information on user expiration.

DIS - DIS indicates that the user record has been Disavowed. Typically a user record would only be disavowed when it is merged with another record. Disavowed records are not active and should not be signed in or have materials checked out.

NEW - Users who have logged in through HarvardKey but have not completed the registration process will show up as NEW.

B - Users who have been blocked will have a clearance status of B. Users who have been blocked should not be allowed to access library materials.

INACTIVE - It is possible to mark a user as inactive, but Harvard does not use this option.

Expiration

A user record will expire 365 days after it was created or last updated by the patron, as long as the user record has been cleared. If the user is not cleared, the record will not expire.

When the user record expires, the clearance status changes to **EXP**. The next time the user logs into HOLLIS Special Request, she will see be asked to re-read the user access policies and update her record. After the user updates her record, she will automatically be cleared again.

Staff can also manually advance a user's expiration date by selecting a new date in the **Expiration Date** field and manually re-clear the user following the instructions above.