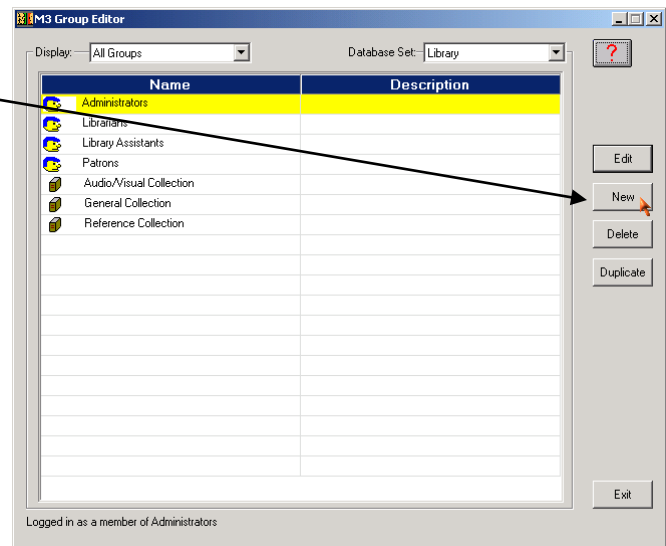
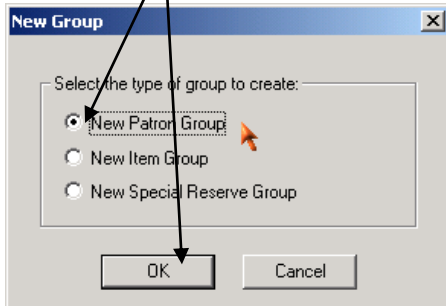


## Creating a Patron Group

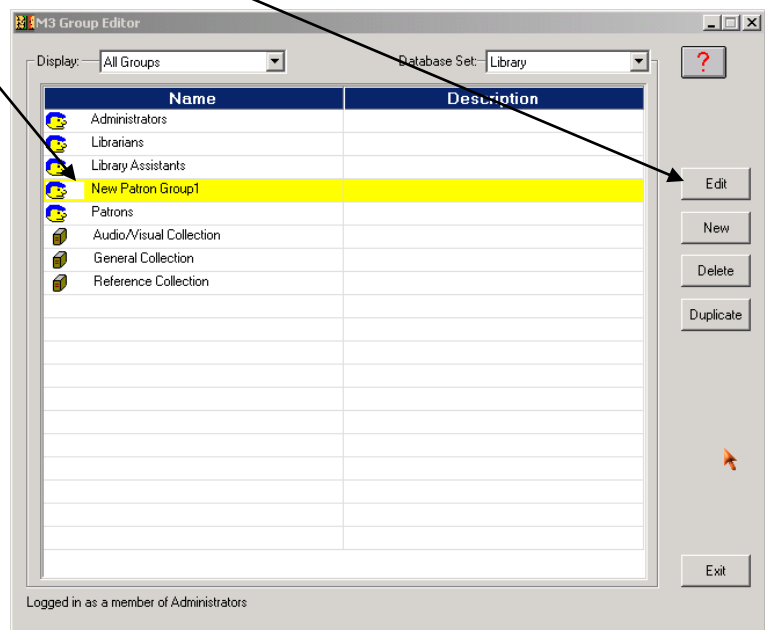
### Use Group Editor



1. In Group Editor, click the “New” button.
2. Choose “New Patron Group” and click OK.



3. Your new Patron Group will come up highlighted. Double click it or click Edit to change the settings on it.



When you click Edit, you will be taken to a series of tabs.

**General:**

Name your group here;  
add a description if  
you like.

Generated  
automatically; this  
means that only people  
in the Librarians and  
Administrators groups  
can edit this group.

The screenshot shows a window titled "Students" with a close button (X) in the top right corner. The window contains several tabs: "Utilities", "Members", "Item Group Overrides", and "Group Access". The "General" tab is selected, showing sub-tabs: "General", "Circ Blocks", "Circ Limits", "Circ Access", "OPAC Access", and "Cataloging Access". The "General" sub-tab is active, displaying a form with the following fields:

- Name:** A text box containing the word "Students".
- Description:** A large text area for adding a description.
- Created by Patron Group:** A dropdown menu with "Librarians" selected.
- Card Expiration Period:** A section with a label "Card Expiration Period:" and a "Days:" field with a value of "0" and up/down arrows.

At the bottom of the window are three buttons: "OK", "Cancel", and "Apply".

## Circ Blocks

Gives permission to Add, Edit, Delete, and Attach messages in circulation. Only users such as librarians, library assistants, administrators (M3 Administrators, not school administrators) generally have access to these tasks.

The 'Students' dialog box is shown with the 'Circ Blocks' tab selected. The dialog has a title bar with a yellow icon and a close button. Below the title bar are four tabs: 'Utilities', 'Members', 'Item Group Overrides', and 'Group Access'. The 'Circ Blocks' tab is active, showing a grid of checkboxes for various permissions. The 'General' sub-tab is selected, showing permissions for adding, editing, and deleting messages, as well as attaching and detaching information and nudge blocks. The 'Circ Limits' sub-tab is also visible, showing permissions for attaching and detaching privilege and blocking blocks, and overriding privilege and blocking blocks. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

Utilities	Members	Item Group Overrides	Group Access
General	Circ Blocks	Circ Limits	Circ Access
		OPAC Access	Cataloging Access

General	
<input type="checkbox"/> Add Messages	<input type="checkbox"/> Delete Messages
<input type="checkbox"/> Edit Messages	
<input type="checkbox"/> Attach Information Blocks	<input type="checkbox"/> Attach Nudge Blocks
<input type="checkbox"/> Detach Information Blocks	<input type="checkbox"/> Detach Nudge Blocks
<input type="checkbox"/> Attach Privilege Blocks	<input type="checkbox"/> Attach Blocking Blocks
<input type="checkbox"/> Detach Privilege Blocks	<input type="checkbox"/> Detach Blocking Blocks
<input type="checkbox"/> Override Privilege Blocks	<input type="checkbox"/> Override Blocking Blocks

OK Cancel Apply

## Circ Limits

Sets the number of items members of the group can borrow, reserve, renew, etc. These options can always be overridden by the librarian.

The 'Students' dialog box is shown with the 'Circ Limits' tab selected. The dialog has a title bar with a yellow icon and a close button. Below the title bar are four tabs: 'Utilities', 'Members', 'Item Group Overrides', and 'Group Access'. The 'Circ Limits' tab is active, showing a grid of checkboxes and numeric input fields for various limits. The 'Loan Limit' is set to 3, 'Reserve Limit' to 3, 'Hold Limit' to 3, 'Renewal Limit' to 6, and 'Damaged Limit' to 5. The 'Booking Limit' is set to 'None', 'Claimed Never Had Limit' to 3, 'Claimed Returned Limit' to 3, 'Claimed Paid Limit' to 3, and 'Lost Limit' to 3. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom.

Utilities	Members	Item Group Overrides	Group Access
General	Circ Blocks	Circ Limits	Circ Access
		OPAC Access	Cataloging Access

Circ Limits			
<input checked="" type="checkbox"/> Loan Limit	3	<input type="checkbox"/> Booking Limit	None
<input checked="" type="checkbox"/> Reserve Limit	3	<input checked="" type="checkbox"/> Claimed Never Had Limit	3
<input checked="" type="checkbox"/> Hold Limit	3	<input checked="" type="checkbox"/> Claimed Returned Limit	3
<input checked="" type="checkbox"/> Renewal Limit	6	<input checked="" type="checkbox"/> Claimed Paid Limit	3
<input checked="" type="checkbox"/> Damaged Limit	5	<input checked="" type="checkbox"/> Lost Limit	3

OK Cancel Apply

## Circ Access

Determines whether or not members of a group can log into circulation and what tasks they can perform.

The 'Students' dialog box is shown with the 'Circ Access' tab selected. The 'Access Circulation' dropdown is set to 'No'. The 'Operations' section contains the following checkboxes: Loans, Holds/Reserves, Quick Returns, Self Mode, View Library Transactions, Returns, Bookings, Status, Renewals, Recalls, ILL, In-house Circulation, Add Temp Items, Circulation Options, Payments, Change Date, Modify Schedule, and Access Design Mode. The 'Bibliographic Records' section has checkboxes for Add, Modify, and Delete. The 'Holding Records' section has checkboxes for Add, Modify, and Delete. The 'Patron Records' section has checkboxes for Add, Modify, and Delete. The 'Templates' section has checkboxes for Add, Modify, and Delete. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

## OPAC Access

Determines whether or not members of a group can view their own transactions, history, access Visual Catalog Configuration, etc. It does not affect the ability to search the catalog through the OPAC, and it is independent of the WebOPAC.

The 'Students' dialog box is shown with the 'OPAC Access' tab selected. The 'Access OPAC' dropdown is set to 'No'. The main area contains the following checkboxes: View Transactions, Renewals, Holds/Reserves, Bookings, ILL, and Visual Catalog Configuration. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

## Cataloging Access

Specifies whether or not members of a group can log into cataloging and what tasks they can perform.

The 'Students' dialog box is shown with the 'Cataloging Access' tab selected. The 'Access Cataloging' dropdown is set to 'No'. The dialog is divided into four sections, each with a list of permissions (Add, Modify, Delete, Purge, Replace) that are currently unchecked:

- Bibliographic Records:**
  - ☐ Add
  - ☐ Modify
  - ☐ Delete
  - ☐ Purge
  - ☐ Replace
- Holding Records:**
  - ☐ Add
  - ☐ Modify
  - ☐ Delete
  - ☐ Purge
  - ☐ Replace
- Patron Records:**
  - ☐ Add
  - ☐ Modify
  - ☐ Delete
  - ☐ Purge
  - ☐ Replace
- Templates:**
  - ☐ Add
  - ☐ Modify
  - ☐ Delete

Buttons at the bottom: OK, Cancel, Apply.

## Group Access

Specifies which other groups besides the one which created it (see General Tab above) are allowed to edit this particular group.

The 'Students' dialog box is shown with the 'Group Access' tab selected. The 'Groups With Shared Access To Current' list is empty. The 'Groups Without Access' list contains the following groups:

- ILL
- Library Assistants
- Substitute staff

Buttons between the lists: <<, >>.

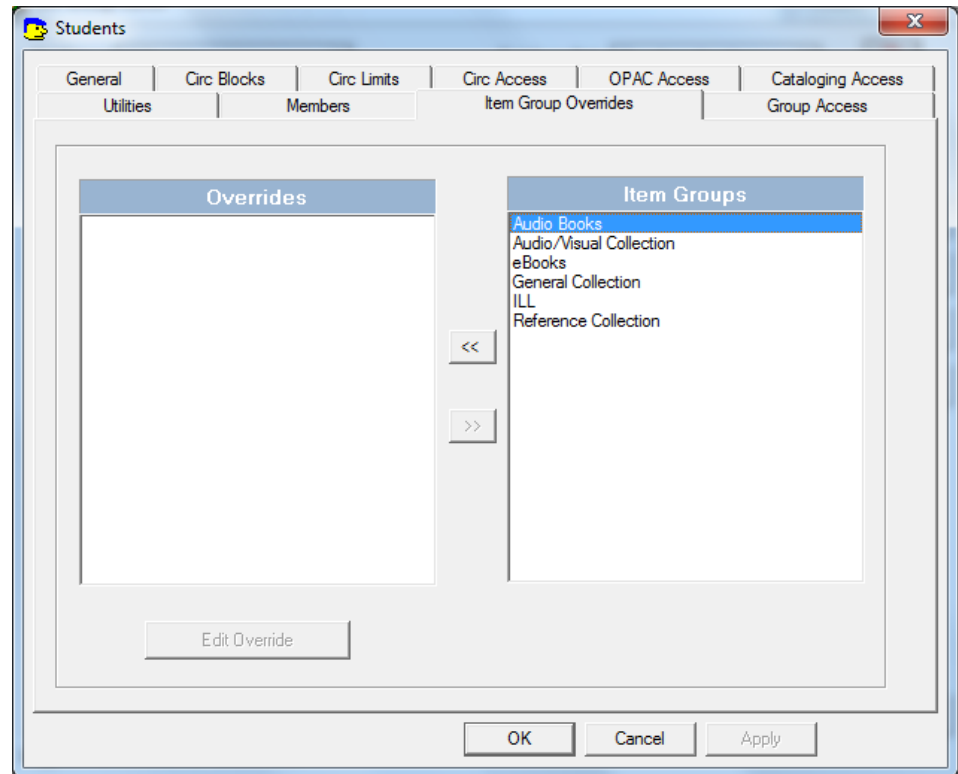
At the bottom, there are two dropdown menus:

- Default Patron Group
- Default Item Group

Buttons at the bottom: OK, Cancel, Apply.

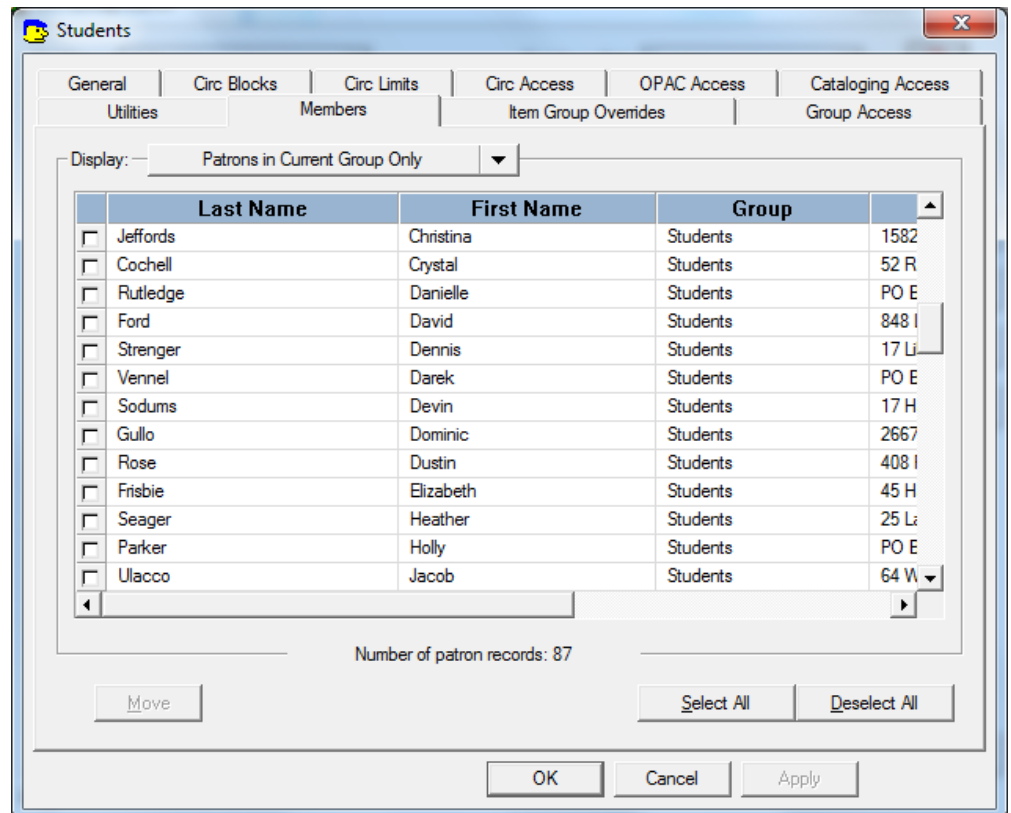
## Item Group Overrides

Used to set different circulation parameters for particular item groups. For example, you may wish to allow Staff to be able to circulate the Reference Collection, or allow them to take books out for a longer period of time than students. In that case, you would edit the Staff group and use the Item Group Overrides to change the limits for those Item groups.



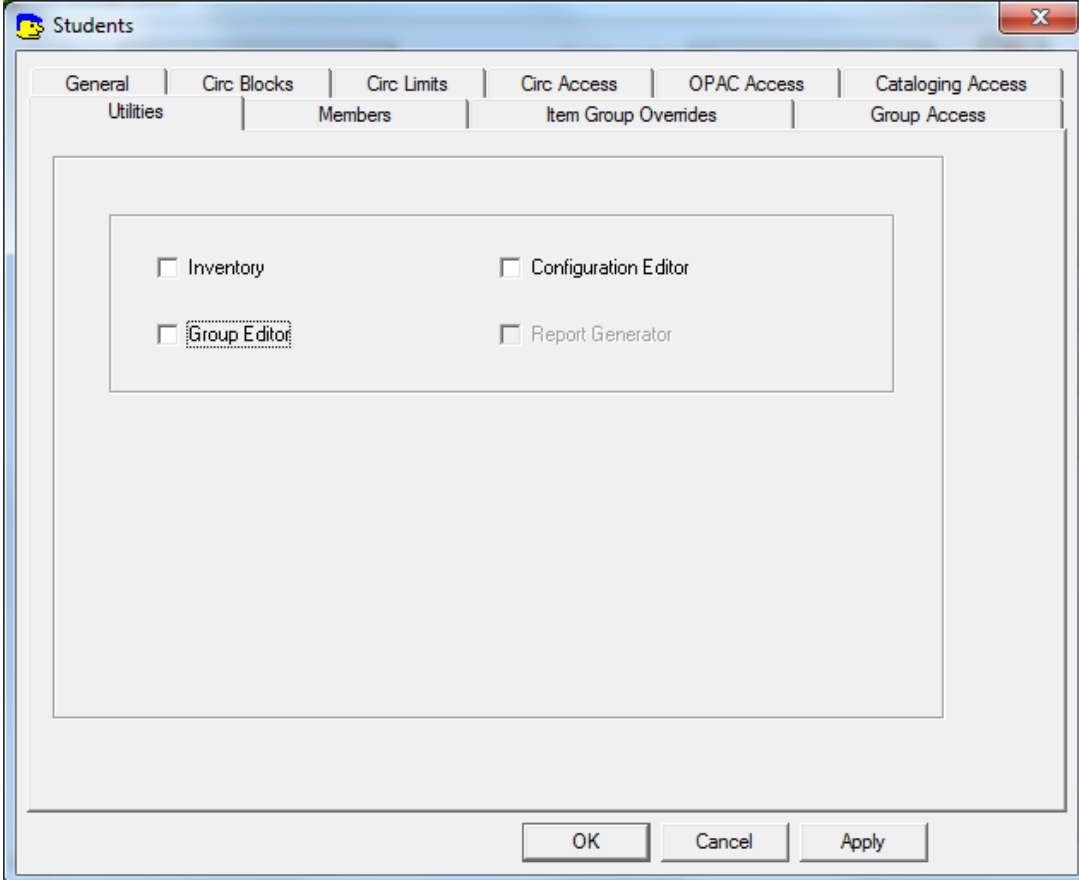
## Members

Lists which patrons are members of a group. You can also search and move patrons to different groups using this tab.



## Utilities

Specifies whether or not members of a group can access Inventory, Group Editor, and Configuration Editor. (*Note: Only Administrators should ever access the Configuration Editor!*)



The screenshot shows a Windows-style dialog box titled "Students". It has a tabbed interface with the following tabs: General, Circ Blocks, Circ Limits, Circ Access, OPAC Access, Cataloging Access, Utilities (selected), Members, Item Group Overrides, and Group Access. The "Utilities" tab is active, displaying a list of four checkboxes: "Inventory", "Configuration Editor", "Group Editor", and "Report Generator". All checkboxes are currently unchecked. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

Utility	Access
Inventory	<input type="checkbox"/>
Configuration Editor	<input type="checkbox"/>
Group Editor	<input type="checkbox"/>
Report Generator	<input type="checkbox"/>