**Users**

Create from template

Information in italics is intended to provide guidance while writing documentation and in general should be removed when a doc is at a v.1 stage. The italics are suggestions to help guide what might go in a particular section. If you feel a section does not apply to the app or feature, please keep the section but just add that it does not apply. If you feel it makes more sense for your documentation, you can move sections up and down.

**Purpose**

The Users app allows for institutions to manage patron information in their FOLIO installation. There is a core user record that contains basic contact information along with IDs and other identifiers. The record also links to core information for active users, including:

- Patron Blocks
- Proxy/Sponsor Information
- Fees/Fines
- Loans
- Requests
- User Permissions (w/in FOLIO - used only for library staff)
- Associated Service Points
- User Notes

All patrons and staff in a library have records in the Users app. **There is not a separate app or directory for library staff users.** The difference between a library staff user and a patron is that the library staff user record has FOLIO permissions assigned to it.

**Permissions**

Permissions to all apps are assigned through the Users app.

See [Users App Permissions](#) for permissions for the Users App specifically. See [Settings - Users](#) for permissions related to Users Settings (e.g., in the Settings App).

**UX/UI**

*Describe out of the box fields, including designed purpose, data requirements and validation, dependencies between fields.*  
*Describe out of the box accordion menus, including purpose of the menus, customization options, and associated permission controls (if any)*  
*Describe any workflows available through navigation menus, including purpose of the workflow, customization options, and associated permission controls.*

The Users App has a standard three pane layout familiar to those who have used other apps.

First pane is search & filter.

Second pane displays search results.

Third pane displays individual records selected from search results.

Then if an individual record is selected for editing, it opens in a fourth pane.

**Individual Record UX/UI**

An individual record has multiple accordions that contain different information about the user.

- User Information
  - Contains patron name information, barcode, patron status, patron group, expiration date
- Patron Blocks
  - Contains blocks that are currently in place on the user record. If a block is in place, you will also see a red warning bar at the top of the patron record, under their full name and above the first accordion
  - Also where you go to create a new block for the patron record
- Extended Information
  - Other IDs - external system ID, FOLIO Number, Username
  - Birth Date
  - Request Preferences
- Contact Information
  - Email, Phone, Cell, and contact preference
  - Physical addresses can also be listed here (can include more than one address)
- Proxy/Sponsor
  - Proxy / Sponsor is used when a patron has permission to borrow items for another patron (the user is a proxy for the other patron) or when another patron has permission to borrow items for that user (the patron is a sponsor for the borrowing user)
• Fees/Fines
• Loans
• Requests
• User Permissions
• Service Points
• Notes
• Custom Fields (pending development)

Searching

Describe pathways for searching in the app/feature through the UI.
Describe fields that are indexed in the back end specifically for searching
Describe any advanced searching features and how they would work.

Basic searching is available through the left-hand menu.

Filters include:

• Patron group
• Active/Inactive Status
• Tags

Functional workflows

Describe available tasks that can be conducted in the app. To document those tasks, create a new page and link it to this page.
Describe action-based permissions that are connected to these functional workflows, if any.

• Patron Blocks - Creating, Managing, Deleting
• Proxy/Sponsor - Adding Proxies, Viewing Proxies, Deleting Proxies
• Fees/Fines - Creating Fees/Fines,
• Fees/Fines - Paying Fines
• Fees/Fines - Transferring Fines
• Fees/Fines - Waiving and Refunds
• Loans - Viewing Open and Closed Patron Loans
• Loans - Anonymizing Loans
• Requests - Viewing Open and Closed Patron Holds, Pages, and Recalls
• Permissions - Adding Permissions and Permissions Sets
• Permissions - Removing Permissions and Permissions Sets
• Service Points - Adding and Removing Service Points from a Patron Record
• User Notes - Adding, Viewing, Deleting Notes from a User Record

Reporting

Describe available in-app reports, including parameters for the reports, and associated permissions.
If there are developed LDP reports/queries for this app / area of FOLIO, describe those reports as well.
List any fields that may not be available in the LDP (e.g., for privacy reasons.)

In-app reports include:

• Overdue Loans Report
  • available in CSV
  • click on “User Search Results” to open menu to run report

Please add other in-app reports as they are created.

LDP reports for users are in development. How they are used depends on whether the institution stores patron-identifiable data in the LDP.

Integrations

Describe any APIs that interact with the app. Provide links to the API / module information in Github.
Describe integrations that individual libraries may wish to develop for this app / area of FOLIO, if relevant.
If existing integrations have been developed by adopting libraries, provide links to the integration in Github or wherever the information can be found.

Describe and include any permanent links such as a link structure to records, searches, etc

Associated Github modules:

• https://github.com/folio-org/ui-users
• https://github.com/folio-org/mod-users
• https://github.com/folio-org/mod-users-bl
• https://github.com/folio-org/mod-permissions
• https://github.com/folio-org/ui-plugin-find-user
Most academic institutions will need to build an integration to allow for bulk loading of patron records from their institution's identity management system. Institutions should share information on integrations that they are building or have built (through Github or other methods) and post the link(s) here.

Considerations for Implementation

DEACTIVATING A USER

If a user is logged in but deactivated, the user will get an error message if they try to click on anything. You should advise all users to logout after each session.