


User Record Expiration

ILLiad Power Up



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
Agenda

- Discuss the “Why?”
- Review the User Record Expiration Process
- Review Configuration Options
- Discuss Implementation Considerations
- Review Lock Out after Failed Log-on Attempts Feature

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Why Expire?

User Record Expiration

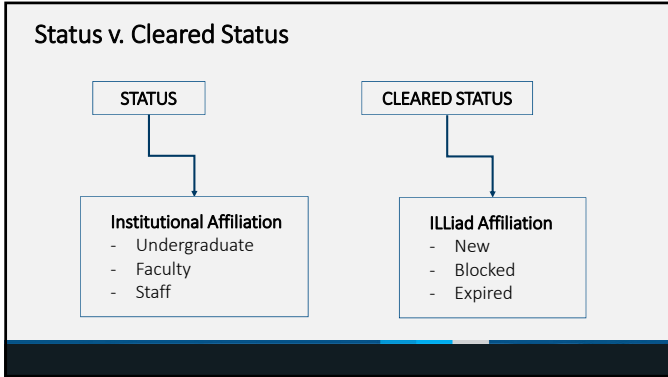


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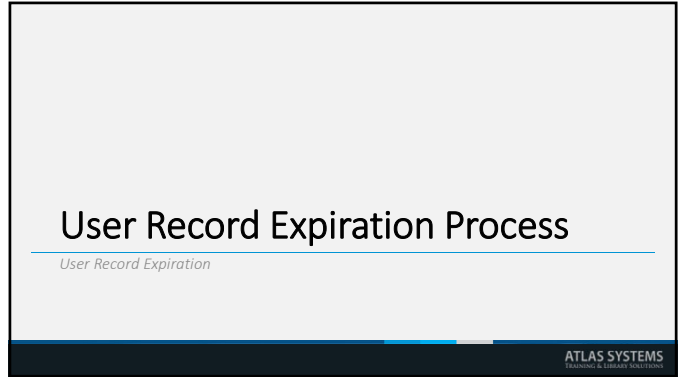
Rationale for User Record Expiration

- Adding functionality to information that is currently available
- Provide updated user information for improved communication
- Provide updated user information for improved reporting

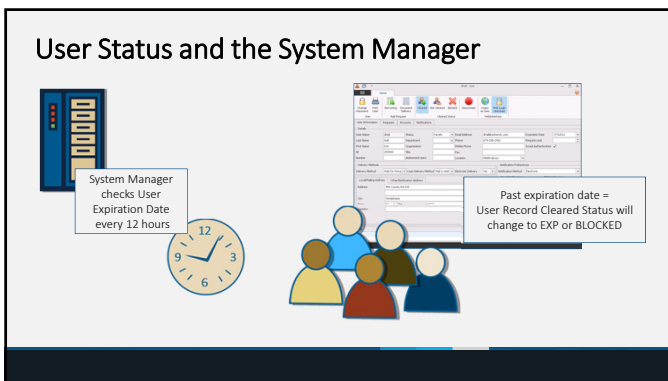
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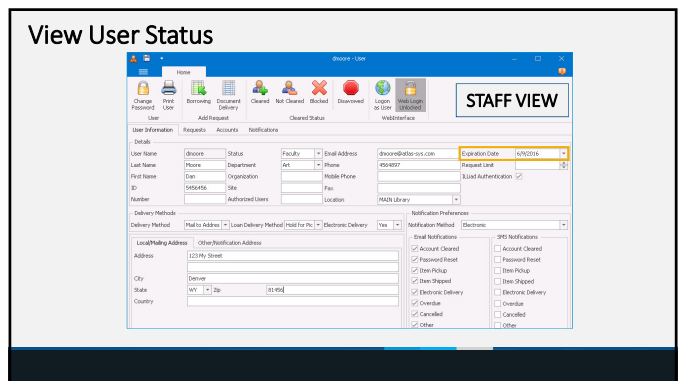
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View User Status

User Record Cleared Status Options

- Yes = Cleared
- No = Not Cleared, New User
- B = Blocked (Manual)
- BO = Blocked (3rd Overdue)

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Display of Expired User on Request Form

NOTE: Same as New/Uncleared User

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Expired User Login

- User prompted to update information

Configuration Options

- Default: User sent to **Change User Information** form
- Customize with alternate **Expired User** page
- Customize result for new Cleared status and expiration date

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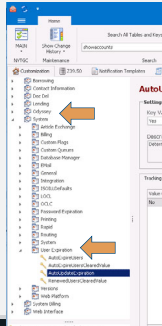
Configuration Options

User Record Expiration

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Four Customization Manager Keys

- System | User Expiration
 - AutoExpireUsers
 - AutoExpireUsersClearedValue
 - RenewedUsersClearedValue
 - AutoUpdateExpiration



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Primary Settings

- **AutoExpireUsers**
 - On-Off Switch
 - Should users automatically expire
 - **Valid Entries: Yes or No**
 - Default = **No**
 - If set to yes, User cleared status change to the value in **AutoExpireUsersClearedValue**
- **AutoExpireUsersClearedValue**
 - The **Cleared Status** set when the User expires
 - Trigger to send users to update their profiles
 - The default value = **EXP**
 - Note: Used only when **AutoExpireUsers** is set to Yes
 - **Valid Entries: EXP (expired) or B (Blocked)**

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Primary Settings

- **RenewedUsersClearedValue**
 - The Cleared Status set **after** users review and update their records
 - **Valid Entries: Yes or No**
 - Default = **No**
 - **No = User will need to be cleared after updating record**
 - Yes = User will not need to be cleared after updating record
 - Used only when **AutoExpireUsers = Yes**
- **AutoUpdateExpiration**
 - Determines if the expiration date will be updated after users update their records
 - i.e. Reset the expiration date
 - **Valid Entries: Yes or No**
 - Default = **No**

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Best Practice: Automated

- AutoExpireUsers = **Yes**
- AutoExpireUsersClearedValue = **EXP**
- RenewedUsersClearedValue = **Yes**
- AutoUpdateExpiration = **Yes**

After expiration date,
user prompted for update upon log-in.
After updating,
the user record clears automatically &
new expiration date is set.

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Best Practice: Manual

- AutoExpireUsers = **Yes**
- AutoExpireUsersClearedValue = **EXP**
- RenewedUsersClearedValue = **No**
- AutoUpdateExpiration = **No**

After expiration date, user prompted for update upon log-in.
After updating, the user record must be cleared by staff & new expiration date is set manually by staff.

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Caution

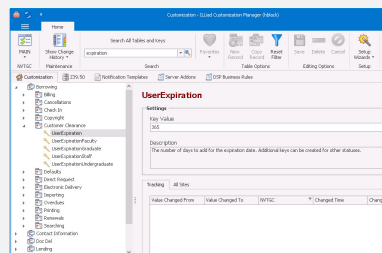
- AutoExpireUsersClearedValue = **B**
 - Users would need to contact you to reinstate their record
- RenewedUsersClearedValue = **No**
 - You will need to clear the user after record update
- AutoUpdateExpiration = **No**
 - Users will continue to receive prompt to update their user record
 - Set to Yes if manually changing expiration date



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Customize Expiration by Status

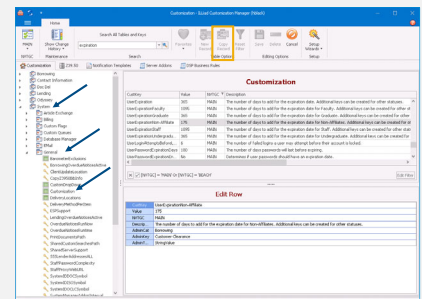
- Borrowing
 - Customer Clearance
 - User Expiration—All Users
 - UserExpirationFaculty
 - UserExpirationGraduate
 - UserExpirationStaff
 - UserExpirationUndergraduate



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Custom Statuses

- For non-default User Statuses
 - System
 - General
 - Customization
- Use **Copy Record** option and update for new status type



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Custom Expiration Example

The image shows two screenshots of an 'Edit Row' form. The top screenshot is for 'UserExpirationForGraduate' with a value of 305. The bottom screenshot is for 'UserExpirationForAffiliate' with a value of 175. Both forms have a 'Description' field that reads: 'The number of days to add for the expiration date for Graduate. Additional keys can be created for other statuses.' The 'AffiliateKey' field is highlighted in yellow in the bottom screenshot.

Field	Value
Control	UserExpirationForGraduate
Value	305
MYSC	MA21
Description	The number of days to add for the expiration date for Graduate. Additional keys can be created for other statuses.
AdminKey	Expiring
AdminKey2	Customer Clearance
AdminKey3	Stronghold

Field	Value
Control	UserExpirationForAffiliate
Value	175
MYSC	MA21
Description	The number of days to add for the expiration date for Non-Affiliate. Additional keys can be created for other statuses.
AdminKey	Expiring
AdminKey2	Customer Clearance
AdminKey3	Stronghold

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Implement Expired User Page

- Copy ChangeUserInformation.html
- Change name of copy to **ExpiredUsers.html**
 - Edit as needed
- Add new entries to web validation table

Demonstration

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Implementation Considerations

User Record Expiration

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Potentially Thousands of User Records Will Expire!

BUT

- They won't all log in at the same time
- Many won't ever log in again
- Setting **RenewedUsersClearedValue** to Yes means no extra work for staff to clear users again
- Add "heads-up" warning information
 - Web Alerts
 - Notifications
 - Log-on Page
 - Print Templates

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Summary

- Force Users to update contact and other user information
- New cleared value
 - EXP = expired
- Not turned on by default
- Set to Expire or Block
- Can add alternate landing page for Expired users to update records
- Status-specific expiration

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Lock Out after Failed Attempts

User Record Expiration

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TRAINING & LIBRARY SOLUTIONS

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Lock Account after Failed Login Attempts

- Two new keys
 - System | System
 - *UsingUserLockout* -- Activates Block
 - *UserLoginAttemptsBeforeLock* -- Number of attempts allowed
- Activate by Default
 - Six (6) attempts
- Unlock with **Web Login Locked** on User Record
 - **Recommended: Force Password Reset** as well

Active by
Default in 9.1

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**NB: Applies only to
ILLiad Basic and ILLiad Exclusive
Authentication Methods**

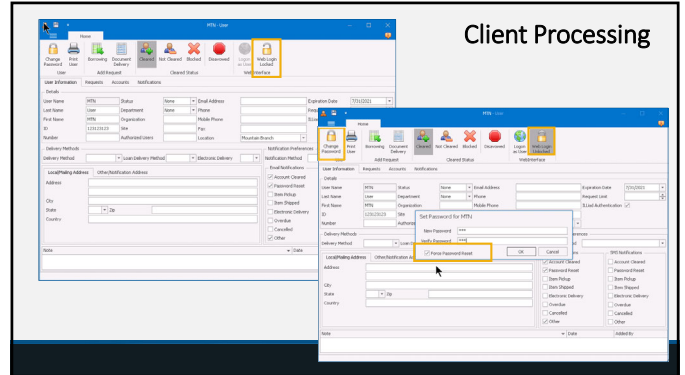
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Patron Message

ILLiad
User has been locked out due to exceeding the failed login limit. Please contact library staff to unlock this account.
Please contact the Interlibrary Loan office during normal business hours to reinstate your service.
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Client Processing



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Contact Us Anytime

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