

# Digital Only Accounts

## About Digital Only Accounts

This profile type was originally restricted to students whose schools have partnered with a PINES library to register them for library cards. The library cards are restricted to one year (ie, the school year), and do not allow holds or circulation of physical materials. The cards only allow access to online materials that are available through the library.

A Memorandum of Understanding should exist between each library and school that participates in this program.

The Digital Only account can be converted to a full Patron account if the patron visits the library with a parent or guardian, or if the patron has turned 18 and visits the library to update the account information.

A pilot was begun May of 2017 and the Executive Committee chose to make it a permanent account type May of 2018.

In May of 2019, the account type was expanded to allow use as needed for deployed military, for patrons who are unable to visit the library and only wish to check out digital materials, and for people experiencing homelessness.

## Best Practices Registering New Student Accounts

### 1. Sign up

- School collects parent permission forms and student data. (The standard library card registration form can be used, or the library can create a customized form for this purpose.)
- School delivers forms/data to the partner library.

### 2. Account Creation

- Library creates Digital Only accounts.
  - At this time, this must be done individually. No batch processing is available.
  - Library may wish to include the school name in an alert field.
- Library packages each new card so that it can be delivered to the school. This package should include the students name, password, welcome information, and routing information so that it can be delivered to the appropriate school and teacher/office.

### 3. Delivery

- The library delivers the library cards to the school and the school distributes them to the students.
- The system will email the standard welcome notice to any student that has an email address included on his or her account.

## Best Practices for Batch Renewals

This process will save staff time by allowing batch renewals of the student digital card accounts. This process should only be used for students that are remaining in the same school for the next school year, and at this time is limited to 100 accounts at a time.

### Generate a list of Digital Only accounts

The easiest way to do this is to use a Quick Report: Patrons > List of Patrons or Staff by Permission Group  
Export this list to an Excel file.

### Confirm which accounts should be renewed

The school will need to provide a list of students that are continuing for another school year. This list can then be compared to the Excel file generated in step 1.

Remove any students from the Excel file that are not on the list of continuing students, leaving only the accounts which should be renewed.

### Export the barcodes

Delete the table header row and all of the non-barcode columns from the Excel file, leaving only barcode data.

This barcode data will then need to be broken down into blocks of 100 accounts (note: this 100 account limitation will be removed at some point, but at this time, we need to work around it).

Save each block of 100 accounts as a CSV (Comma Separated Value) file.

### Create a User Bucket

1. In Evergreen, go to Circulation > User Buckets.
2. Create a New Bucket called "Digital Card Renewals".

## Add accounts to User Bucket

1. Switch to the Pending Users tab.
2. Click Browse and select the first CSV file.
3. You should see that the accounts have been imported (you may need to change the number of visible rows to 100).
4. Click on the Buckets dropdown and select the Digital Card Renewals bucket.
5. Select all of the accounts.
6. Click Actions > Add to Bucket

## Batch renew accounts

\* Note: In order to do this step, staff must have the CONTAINER\_BATCH\_UPDATE permission. LibraryManager and LocalAdmin accounts should have this permission automatically.

1. Switch to the Bucket View tab.
2. Select all accounts (you may need to change the number of visible rows to 100).
3. Click "Batch edit all users".
4. The "Update all users" popup will appear.
5. Type in a name (eg, "Update expiration date")
6. Choose the new Privilege Expiration Date.
7. Click Apply Changes.
8. You should see green bars go across the screen as the accounts are updated.
9. Select all the accounts again.
10. Click Actions > Remove Selected Users from Bucket
11. Repeat steps 5 and 6 until all renewals are processed.

Update all users

Name for edit set

update expiration date

Home Library ▾

Unset

Main Profile ▾

Unset

Internet Access Level ▾

Unset

Barred flag

Unchanged ▾

Active flag

Unchanged ▾

Juvenile flag

Unchanged ▾

Privilege Expiration Date

08 / 01 / 2019

Apply Changes

Cancel

## The Cards

A digital card design has been approved and can be ordered by the library, or the library may choose to use either the standard PINES card design or one of the approved children's card designs (see: <http://pines.georgialibraries.org/cards>).

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