

Patron PIN Masking in Workflows Cheat Sheet

(Revised 2019-02-19)

Implemented in Workflows on 2019-02-27

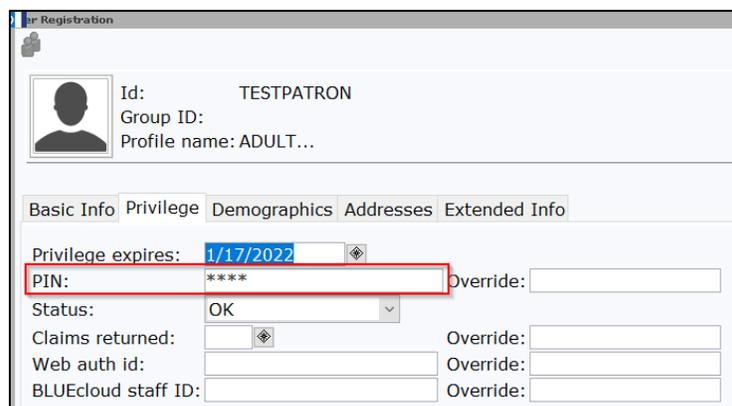
Patron PIN masking in Workflows obscures the PIN display in the User Registration and Modify User wizards display in Workflows. Staff simply see ***** instead of the patron's PIN. This has no effect on the patron side of things in RSAcat.

Creating a new user with the User Registration wizard

When registering a new patron you will see **** for the PIN. The system either randomly generates a PIN or, for those libraries that have requested it, the PIN will be the standard preset PIN you selected.

Note: Present PIN options outside of the default random 4 character PIN are a preset word like your school's mascot name or the last 4 or 5 digits of the patron's ID. Contact the Help Desk for more details.

- To change the default PIN, click in the field to highlight the **** and type the new PIN.
- You will only see asterisks (****) as you type the new PIN, not the numbers and letters.
- Enter the standard override in the override box to finish setting the PIN.



The screenshot shows the 'User Registration' wizard interface. At the top, there is a profile icon and fields for 'Id: TESTPATRON', 'Group ID:', and 'Profile name: ADULT...'. Below this are tabs for 'Basic Info', 'Privilege', 'Demographics', 'Addresses', and 'Extended Info'. The 'Privilege' tab is active, showing a 'Privilege expires:' field with the date '1/17/2022'. The 'PIN:' field is highlighted with a red box and contains '****'. To the right of the PIN field is an 'Override:' field. Below the PIN field are fields for 'Status:' (set to 'OK'), 'Claims returned:', 'Web auth id:', and 'BLUEcloud staff ID:', each with an 'Override:' field.

Important Note: PINs are NOT case sensitive! The system treats all PINs as uppercase no matter how they are typed. In other words, the system considers all the following entries as the same PIN: "HaPpY", "HAPPY", "happy", "hAppY" and "HAPPY". All are converted to "HAPPY". Patrons only need to type in the correct letters and numbers of their PIN in RSAcat and other services that authenticate via Symphony.

Resetting a Patron PIN

When patrons contact the library requesting their PIN, use your local procedures to determine if you will share the PIN over the phone or email or require the patron to ask in person.

To Reset a Patron's PIN, start by opening the Modify User wizard, pull up the patron's account and selecting the Privilege tab.

If the patron told you what to use for their PIN: simply enter that PIN. Use any combination of letters and numbers 4 digits or longer.

If the patron has not told you their desired PIN: we recommend Public libraries use the patron's birthdate (in 8 digit form MMDDYYYY) as the temporary PIN. School and Special libraries can use something like the school mascot, graduation year, or school ID number of the student. In most cases, at least one form of this information is already available in the patron's account. Using a local standard temporary PIN will allow all staff to provide the same help and advice to patrons with PIN issues.

- Click in the PIN field to highlight the old PIN (****) and type in the new PIN.
- You will only see asterisks (****) as you enter the new PIN, not the numbers and letters.
- Enter the standard override in the override box to finish setting the PIN.

The screenshot shows the 'Modify User' wizard interface. The 'Privilege' tab is selected. The 'PIN' field is highlighted with a red box, showing '*****'. The 'Override' field is also highlighted with a red box. Other fields include 'Name: Patron, Test E', 'Id: TESTPATRON', 'Group ID:', 'Profile name: ADULT...', 'Identify User' with 'User ID: TESTPATRON', 'Privilege expires: 1/17/2022', 'Status: OK', 'Claims returned: 0', and 'BLUEcloud staff ID:'.

Each library should develop or follow their existing standard practice for when and how to change patron's PINs. Details of contact or in-person requirements for changing patron PINs are up to the individual members.

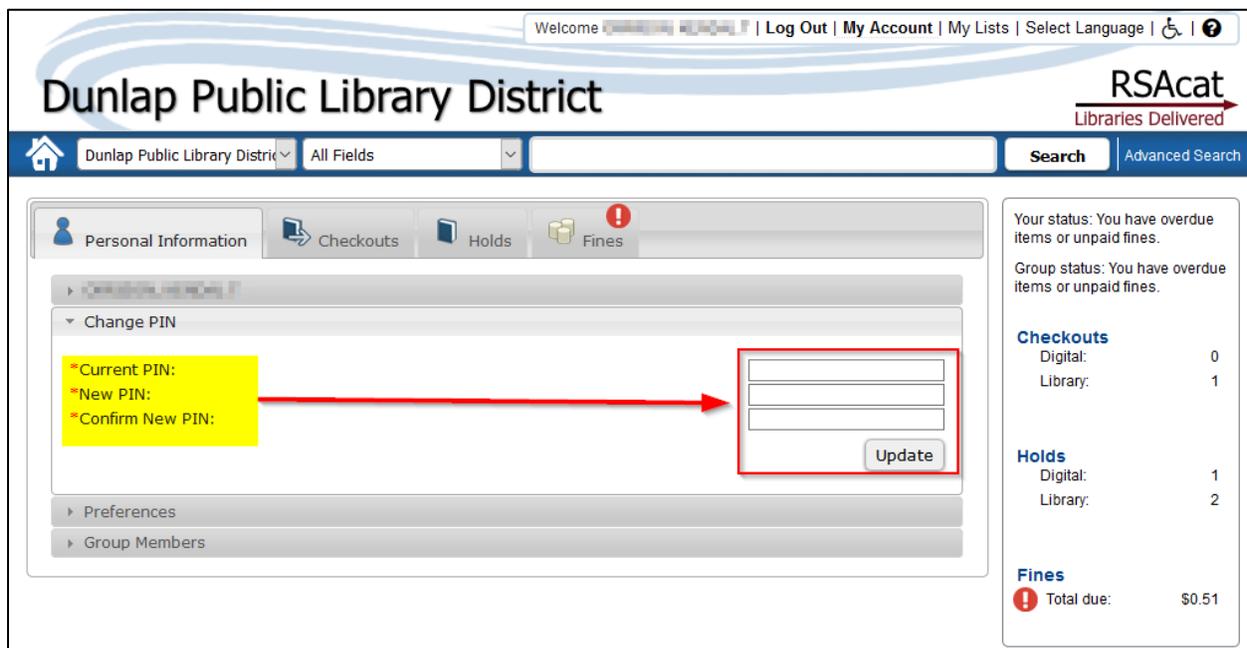
Troubleshooting RSAcat login issues or other accounts requiring the patron PIN

When a library staff member troubleshoots a patron issue that requires them to log in as the patron, they need to know the patron’s PIN. If the patron did not tell you their PIN when requesting help, you will need to reset the patron’s PIN to access their account.

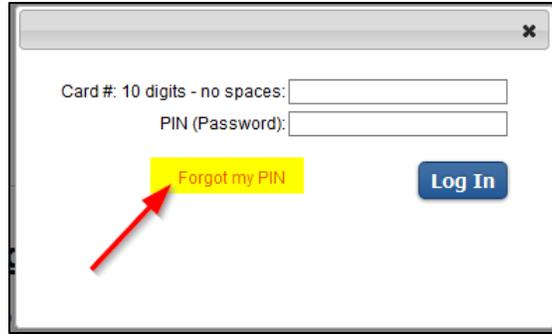
Reset the patron’s PIN to a known value like their 8 digit birthdate. Follow local procedures on resetting patron’s PINs. Do any troubleshooting required. When the patron is contacted with the results of your troubleshooting remember to inform them that their PIN had to be reset and what the patron’s temporary PIN is.

Patron PIN Resetting and Forgot my PIN in RSAcat

Patrons can reset their PIN in RSAcat by logging in and going to the My Account page, Personal Information tab, Change PIN section.

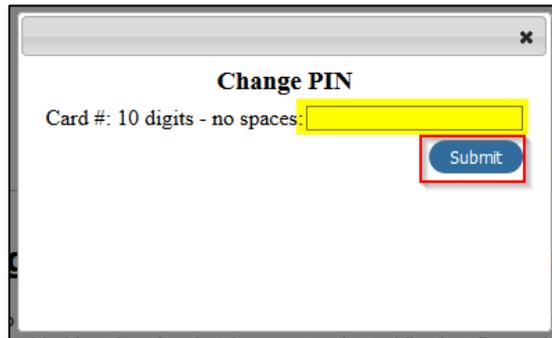


Alternatively, patrons entered in Workflows with an email address can use the ‘Forgot my PIN’ feature in the RSAcat Log In window. Clicking this link sends the patron an email that allows them to reset their PIN without knowing the current PIN. Note: if the patron’s email address is missing or incorrect, the system has no way to inform the patron. In this case, the patron will not receive an email and the link will do effectively nothing.



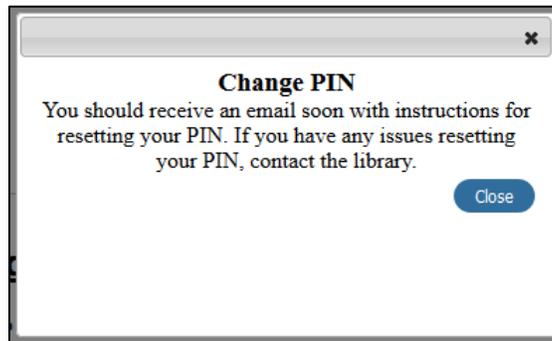
Card #: 10 digits - no spaces:
PIN (Password):
[Forgot my PIN](#)

Patron Enters their ID.



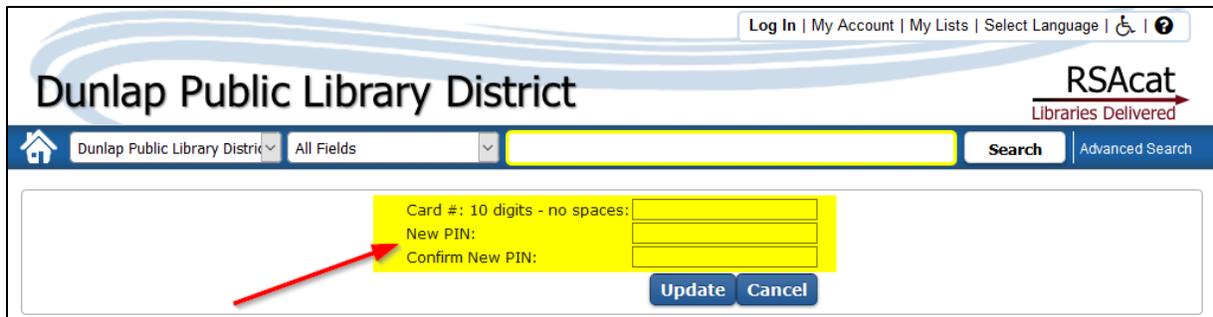
Change PIN
Card #: 10 digits - no spaces:

Once the patron enters their PIN and clicks Submit, they will see the following message.



Change PIN
You should receive an email soon with instructions for resetting your PIN. If you have any issues resetting your PIN, contact the library.

Assuming the patron's email exists and is correct, they will receive an email with a link to the reset page in RSACat. This is where they enter their card number and new PIN.



Log In | My Account | My Lists | Select Language |  | 

Dunlap Public Library District **RSACat**
Libraries Delivered

All Fields

Card #: 10 digits - no spaces:
New PIN:
Confirm New PIN: