

866-940-4083

## User Registration Library Name Properties Revised March 2018

Before registering new patrons for the first time, properties from two different wizards, that contain your library name, will need to be changed.

User Registration wizard properties:



- Log into WorkFlows using the CIRC or TECH login.
- Open the Circulation Module.
- Place the cursor on the User Registration wizard in the User toolbar and right click.
- Select "Properties" from the drop down menu and click.

## A "User Registration: Set Properties" box will appear.

User Registration :	Set Properties			
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		lane		
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User cat3:		✓ User cat4:	~	•
User cat5:		✓ User cat6:	~	
User cat7:	<u> </u>	✓ User cat8:	~	
User cat9:		<ul> <li>✓ User cat10:</li> </ul>	~	
User cat11:		<ul> <li>✓ User cat12:</li> </ul>	~ 	
		Birth date:	W	
Language.	ENGLISH			
Outreach				
Route ID:			*	
I otal items I	imit: 10 🖤			
Usergroup I	Membership Tab			
Responsibili	ty policy:	~		
		OK	Cancel	

On the Default tab:

- Library: Select your library's WorkFlow name from the drop down menu
- Profile Name: Select a default profile name from the drop down menu
- Demographics:
  - User cat1: Select your library's WorkFlow name from the drop down menu
- Click the OK button on the bottom of the "User Registration: Set Properties" box.

To view the default changes:

• Open the "User Registration" wizard.

User Registration : Identify New User	-	×
User ID: Profile name: ADULT		
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The selected "Profile name" default will appear in the "Profile name:" box.

On the "Basic Info" tab, the "Library" box will contain your library's WorkFlows name.

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Acquisitions   Cataloging   Circulation+   Offline   Outreach   Reports   Requests   Reserves   Selection   Serial Control   Utility	
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Alt ID:	
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Special () Profile name: ADULT •	
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Register Another	
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On the Demographics tab, your library's WorkFlow name will be in the "User cat1" box.

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		Save Check Duplicate User User Close	₩ •) 1:20 PM 8/6/2012

**CheckOut wizard properties:** 

Properites will need to be changed if your library uses the "New Registration" helper in the Checkout wizard.

- Close any open WorkFlows sessions.
- Log into WorkFlows using the SUPER login.
- Open the Circulation Module.
- Place the cursor on the CheckOut wizard in the Common Tasks toolbar and right click.
- Select Properties from the drop down menu.

The "CheckOut: Set Properties" box will pop up.

WF Check	CheckOut : Set Properties						
	Display property page: ○Wizard Startup ● Never						
Behav	ior Defaults Helpers						
Allow	Configure Propertie	28					
	User Search						
	Display User						
	User Lost Card						
	Register New User	>					
	Pay Bills						
	Add Brief Title	la contra c					
	Item Search						
	Confirm Address						
	Change Item ID						
	Special Due Date						
	Charge History						
	Alternate Circ Rule						
	Renew Privilege						
	Print User Card						
	Print User						
	Enable add photo						
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- Select the Helpers tab on the "CheckOut: Set Properties" pop up box.
  - Check the box in front of the "Register New User" button.
  - Double click the "Register New User" button.

The "CheckOut: Register New User: Set Properties" box will pop up.

library:	AG_ALS-I	PDC		Profile nar	ne: ADULT
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Primary addr	ess flag: ◉ Addr	ess 1 ◯ Ao	dress 200	Address 3	
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Demographi	CS				
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User cat3:		∼ Use	er cat4:		~
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User cat9:		∼ Use	er cat10:		~
User cat11:		∼ Use	er cat12:		$\sim$
Department:		Birt	h date:		*
Language:	ENGLISH	~			
Outreach					

On the Default tab:

- Library: Select your library's WorkFlow name from the drop down menu
- Profile Name: Select a default profile name from the drop down menu
   Demographics:
- Demographics:
  - $\circ$  User cat1: Select your library's WorkFlow name from the drop down menu
- Click the OK button on the bottom of the "CheckOut: Register New User: Set Properties" box.

WF Check	E CheckOut : Set Properties				
		Display property page: ○ Wizard Startup			
Behav	ior Defaults Helpers				
Allow	Configure Propertie	PS ^			
	User Search				
	Display User				
	User Lost Card				
	Register New User				
	Pay Bills				
	Add Brief Title				
	Item Search				
	Confirm Address				
	Change Item ID				
	Special Due Date				
	Charge History				
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	Renew Privilege				
	Print User Card	$\square$			
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	Enable add photo				
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		<u>O</u> K Cancel			

• Click the OK button on the bottom of the "CheckOut: Set Properties" popup box.

## **Close WorkFlows:**



• Click Yes on the popup box when closing WorkFlows.

The User Profile is a default only. Different "User Profiles" may be selected during patron registration.

These properties must be changed on each computer that is used for circulation.

CheckOut Register New User helper:

WF SirsiDynix Symphony WorkFlows: CheckOu		3
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CheckOut		1
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W Renew Item	Group ID:	
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Paying Bills	BOABK DAVID G	-
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Users 🛞	A13300858057	
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省 Modify User		
🗳 Copy User		
🎸 Confirm Address		
😝 Renew Privilege		
Suspend User		
Send Message		
🖹 Remove User		
🕌 Unsuspend User		
Items		
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Click the "Register New User" helper, the third helper from the left at the top of the "Checkout" wizard.

## The User ID box will appear.

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	Get User Check Out Item Check Out Information To User To New User Close	
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- Fill in User ID
- Click OK and fill in the patron's information.
- Click the "Save" button at the bottom of the "Checkout: User Registration" box to register user,

The patron's user ID will appear in the "User ID" box.

Remember to back up your Sirsi folder that now contains the updated user registration configuration default properties. Instructions for backing up your Sirsi folder is available on the RSA Support web page: <u>www.rsanfp.com</u>.

How to Back Up the Workflows Configuration Folder on Windows 7: <u>http://alsrsa.org/client/search/asset/3503</u> How to Back Up The WorkFlows Configuration Folder on Windows 10: <u>http://alsrsa.org/client/search/asset/5683</u>

The backed up Sirsi folder is used to:

- Transfer settings from one computer to another
- Load configured settings onto a new computer
- Replace settings on a computer that has crashed

Instructions on replacing the Sirsi folder or transferring the folder to another computer is available on the RSA web page.

How to Replace the WorkFlows Configuration Folder on Windows 7: <u>http://alsrsa.org/client/search/asset/4346</u> How to Replace the WorkFlows Configuration Folder on Windows 10: <u>http://alsrsa.org/client/search/asset/5684</u>

Questions??

Contact the RSA help desk at <u>rsahelp@railslibraries.info</u> or RSA staff at 866-940-4083