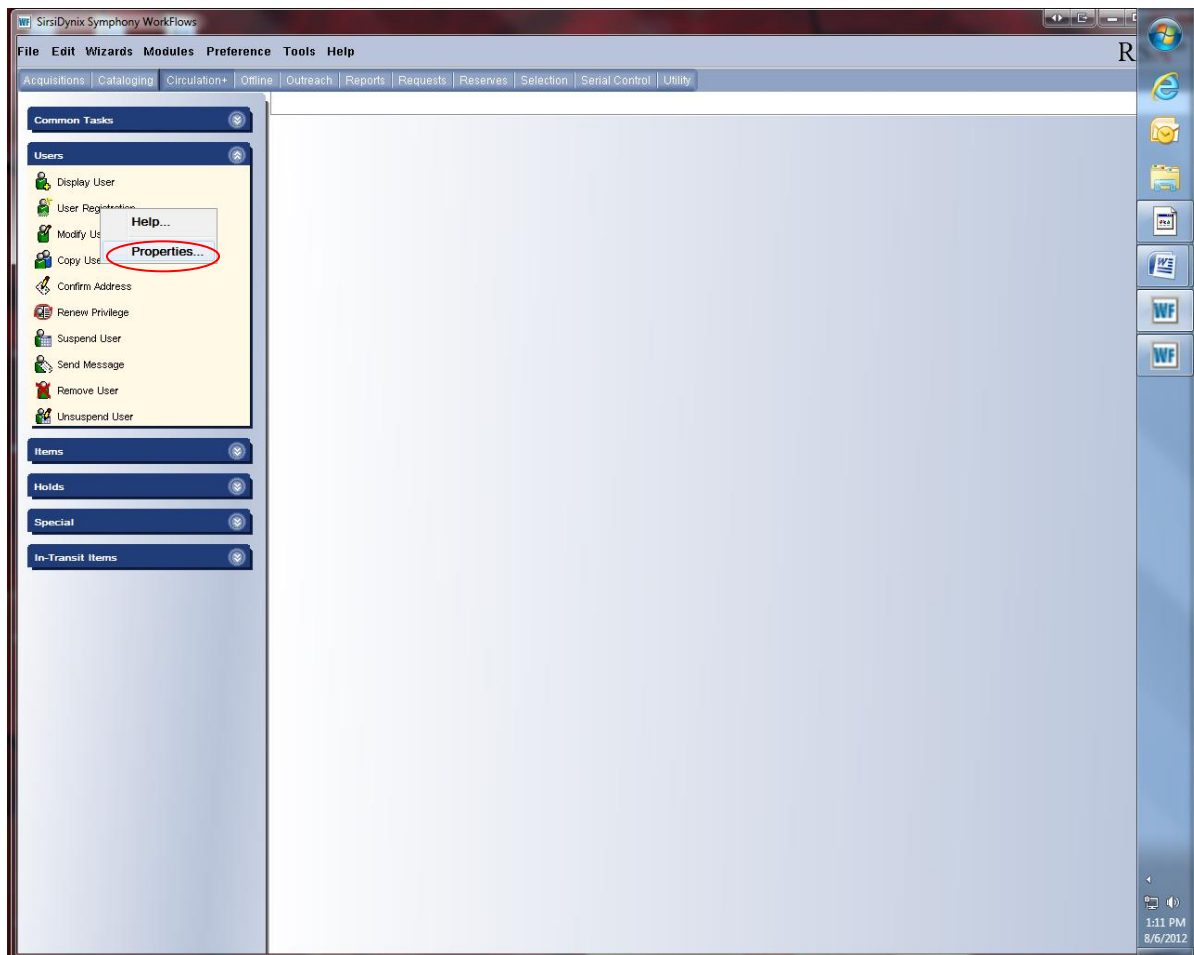


## User Registration Library Name Properties

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

Display property page:  Wizard Startup  Never

Defaults

Library: AG\_ALS-PDC Profile name: ADULT

Charge history rule: NOHISTORY

Track charges as Favorites

Focus on:  First name  Last name

Addresses

Primary address flag:  Address 1  Address 2  Address 3

Demographics

User cat1: AG\_ALS-PDC User cat2:

User cat3:  User cat4:

User cat5:  User cat6:

User cat7:  User cat8:

User cat9:  User cat10:

User cat11:  User cat12:

Department:  Birth date:

Language: ENGLISH

Outreach

Route ID:

Total items limit: 10

Usergroup Membership Tab

Responsibility policy:

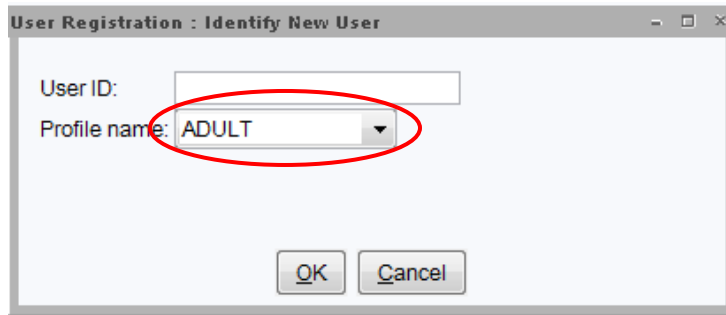
OK Cancel

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.**

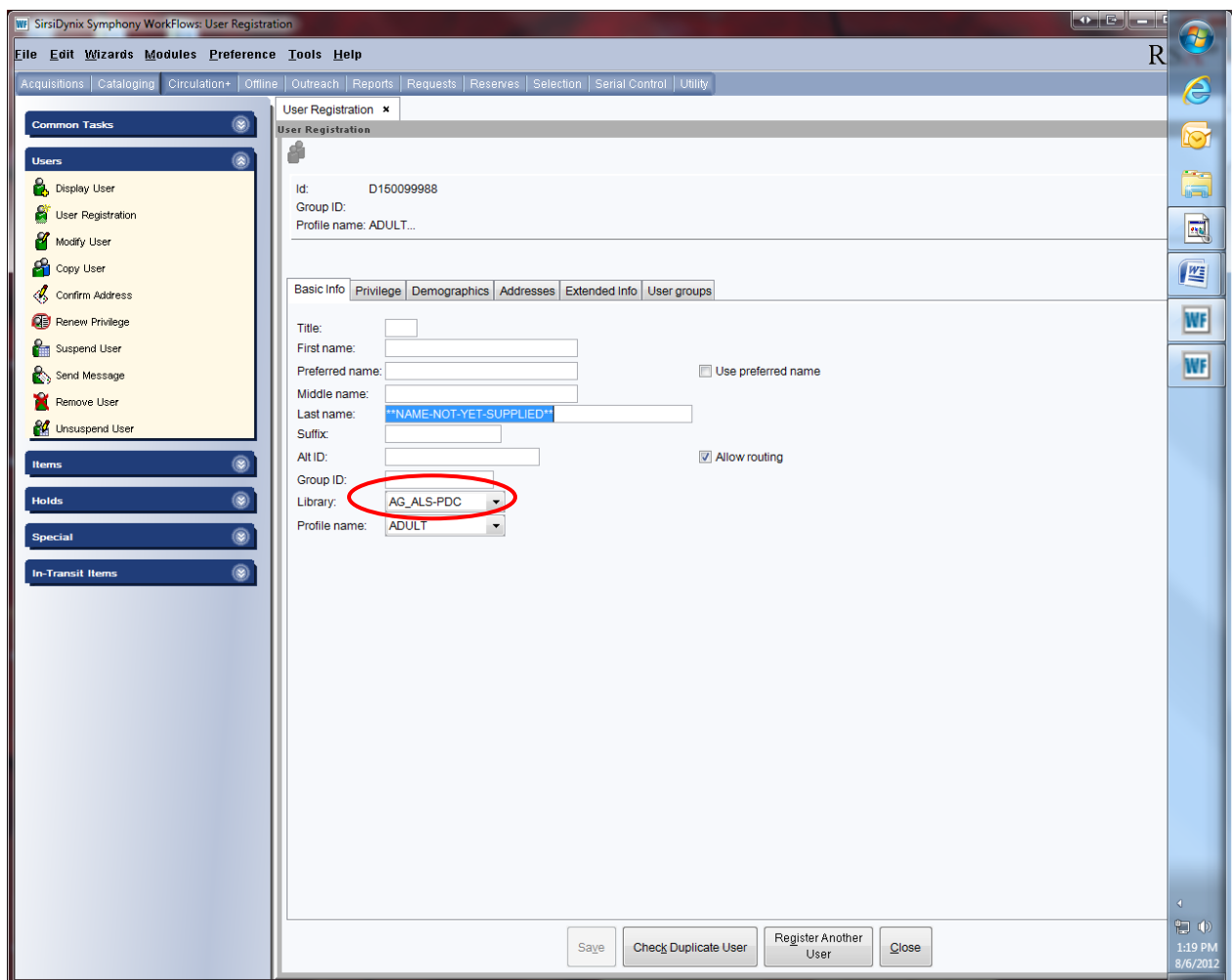
To view the default changes:

- Open the “User Registration” wizard.

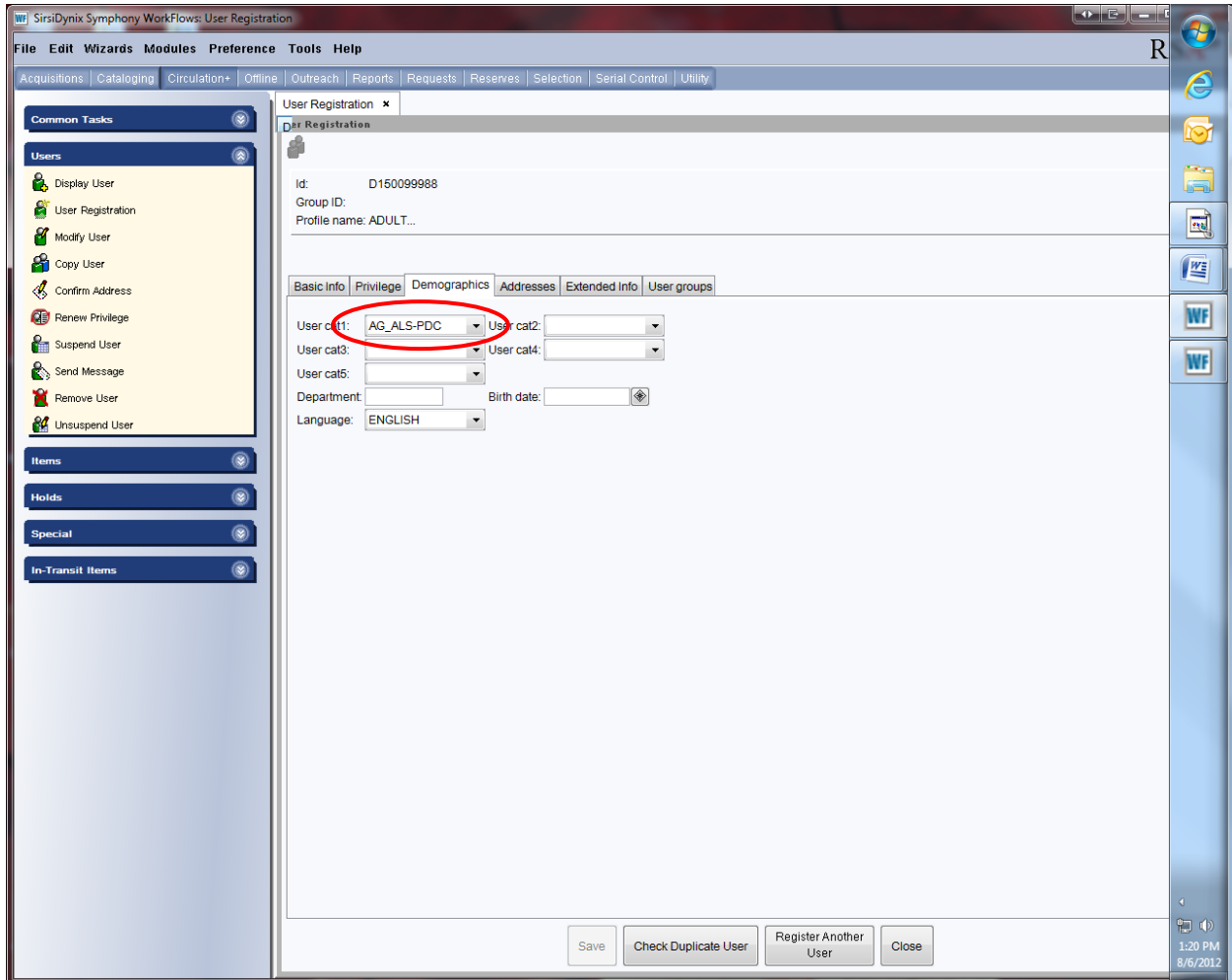


The selected “Profile name” default will appear in the “Profile name:” box.

On the “Basic Info” tab, the “Library” box will contain your library’s WorkFlows name.



On the Demographics tab, your library's WorkFlow name will be in the "User cat1" box.

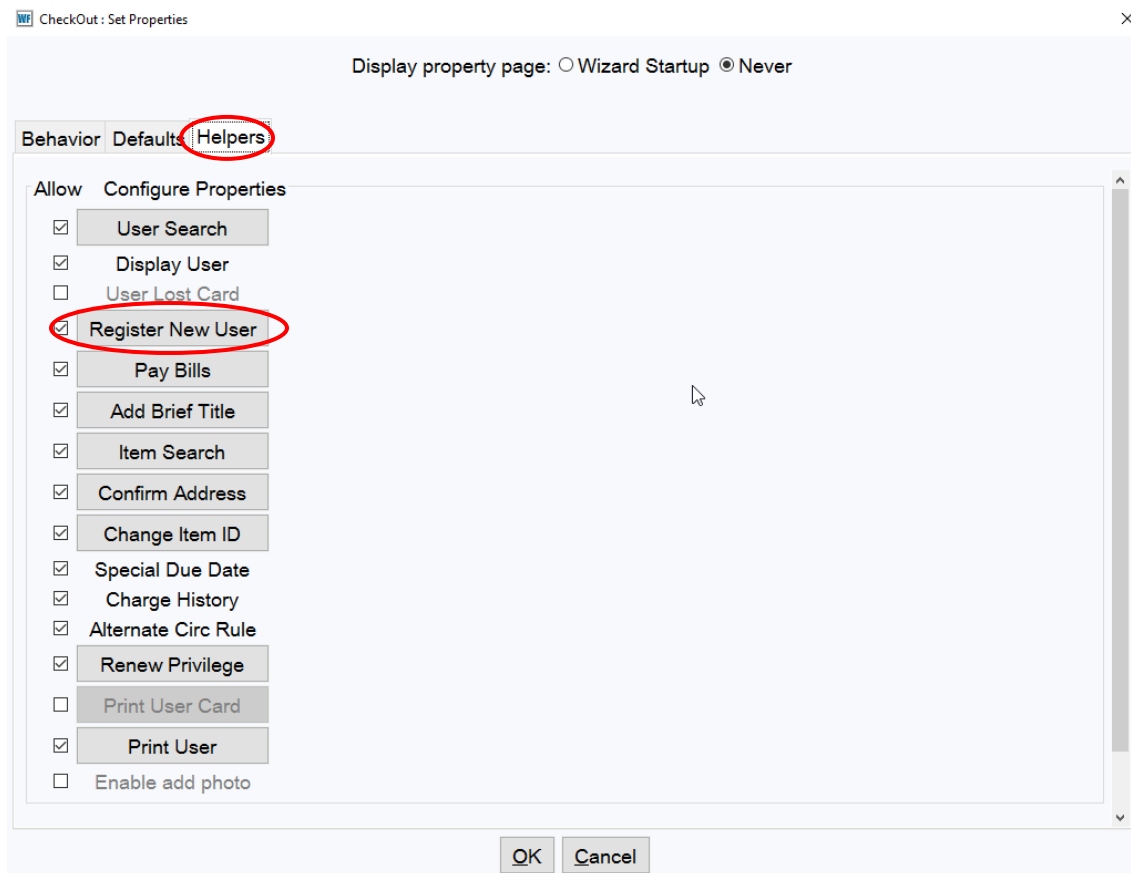


### CheckOut wizard properties:

Properties 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.



- 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.

CheckOut : Register New User:Set Properties

Behavior Defaults

Library: AG\_ALS-PDC Profile name: ADULT

Charge history rule: NOHISTORY

Track charges as Favorites

Focus on:  First name  Last name

Addresses

Primary address flag:  Address 1  Address 2  Address 3

Demographics

User cat1: AG\_ALS-PDC User cat2:

User cat3:  User cat4:

User cat5:  User cat6:

User cat7:  User cat8:

User cat9:  User cat10:

User cat11:  User cat12:

Department:  Birth date:

Language: ENGLISH

Outreach

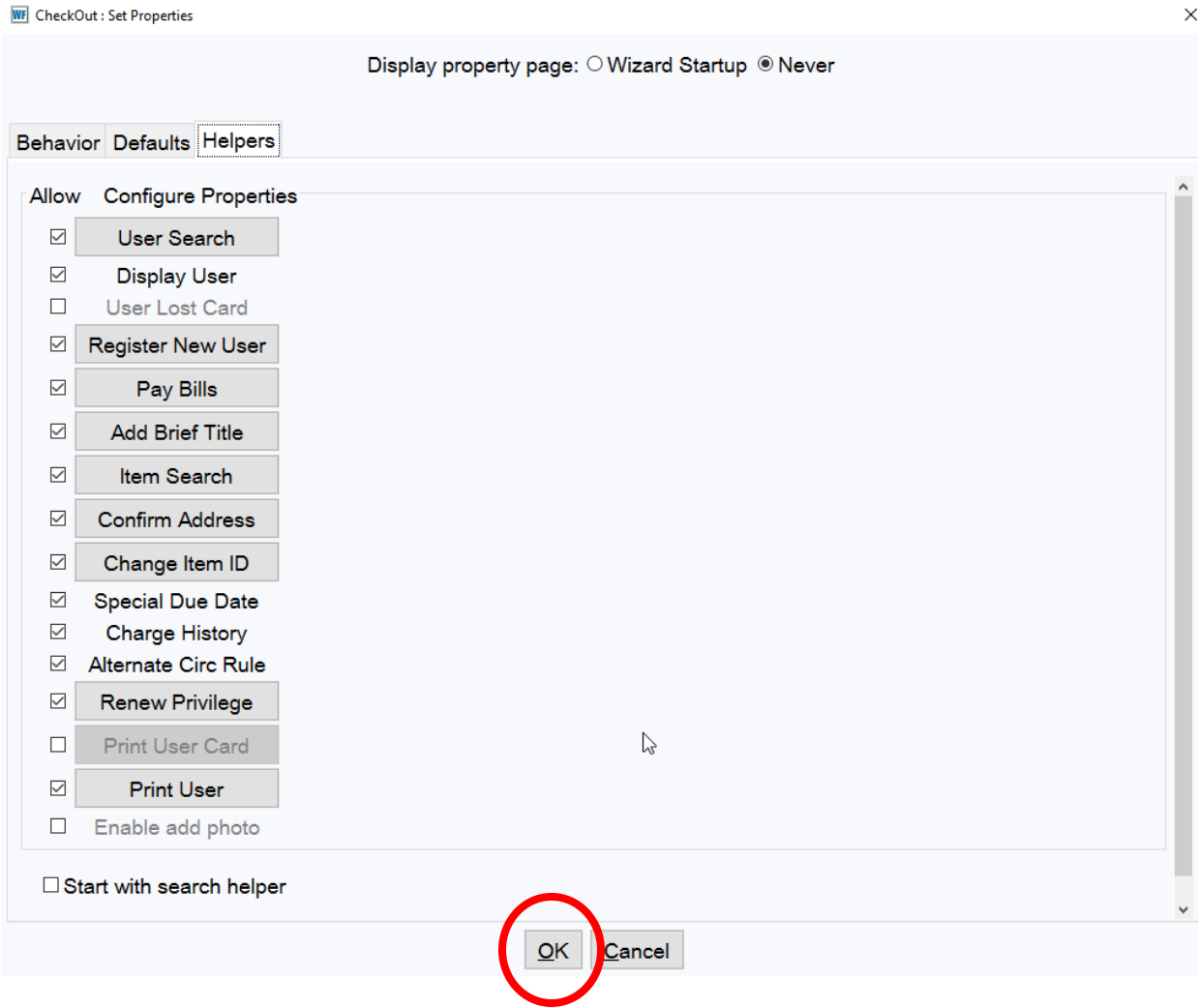
Route ID:

Total items limit: 10

OK Cancel

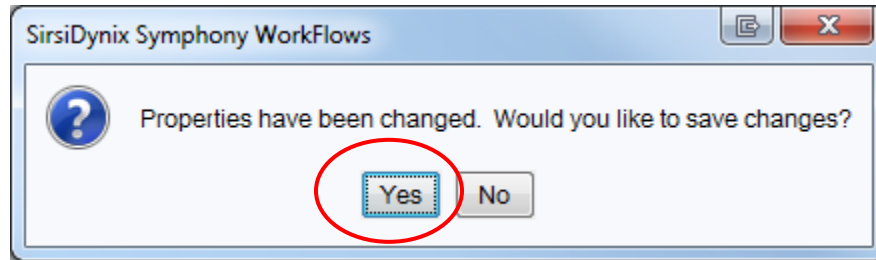
On the Default tab:

- 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 “CheckOut: Register New User: Set Properties” box.



- Click the OK button on the bottom of the “CheckOut: Set Properties” popup box.

**Close WorkFlows:**

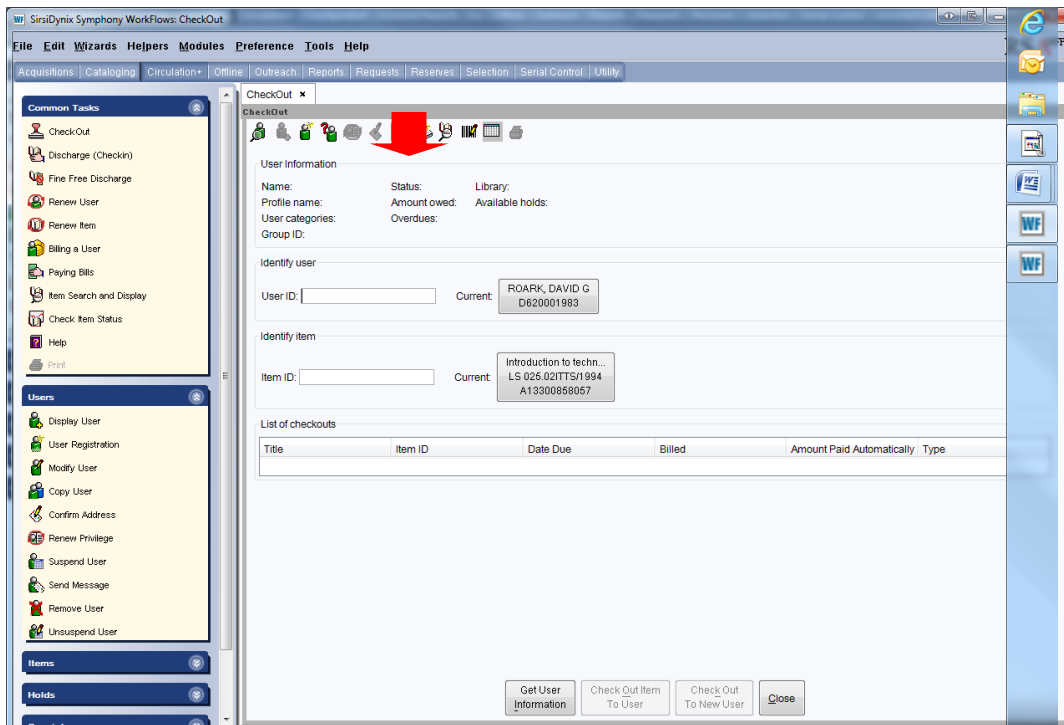


- Click Yes on the popup box when closing WorkFlows.

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.

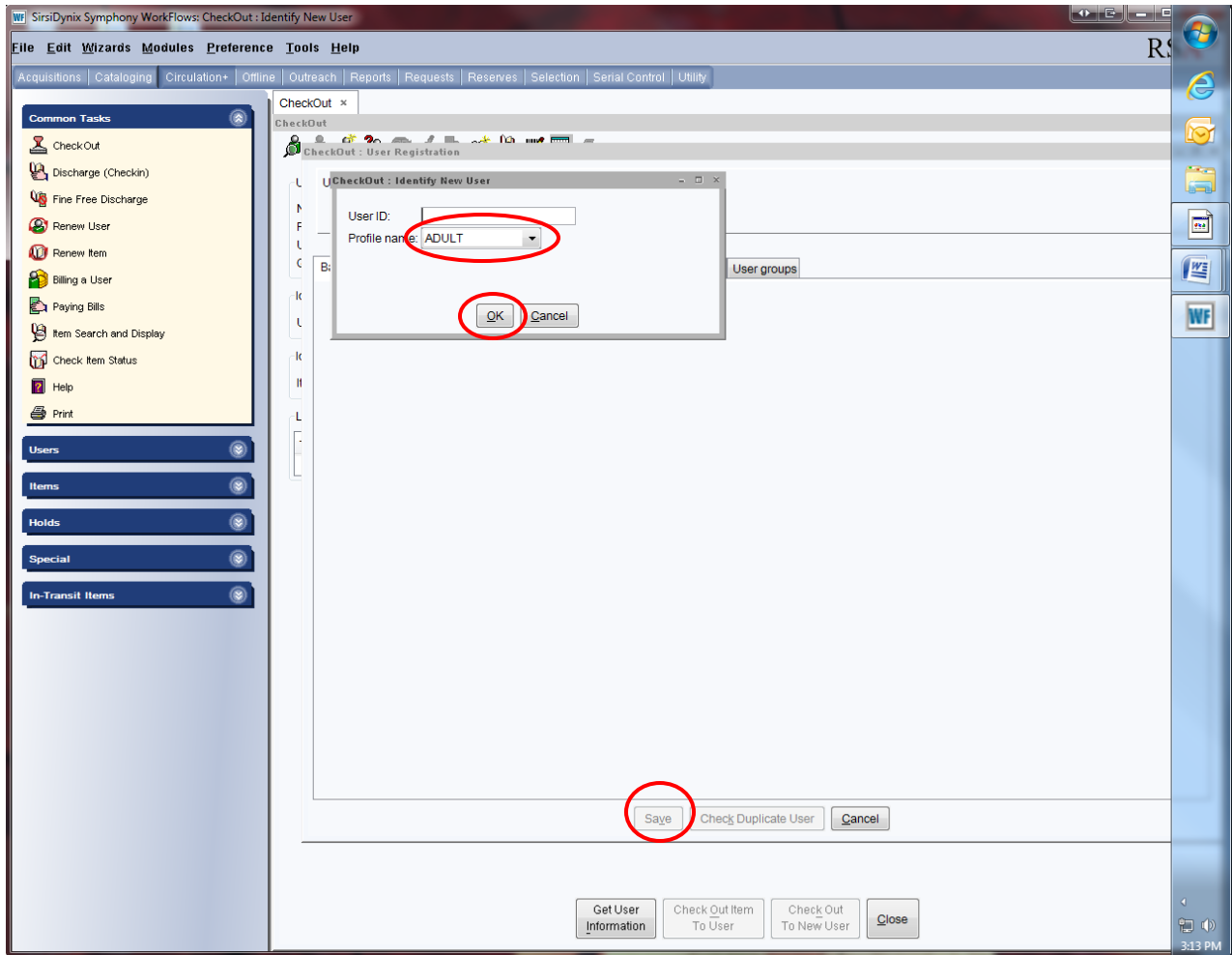
**CheckOut Register New User helper:**



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.



- 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: [www.rsanfp.com](http://www.rsanfp.com).

How to Back Up the Workflows Configuration Folder on Windows 7:

<http://alsrsa.org/client/search/asset/3503>

How to Back Up The WorkFlows Configuration Folder on Windows 10:

<http://alsrsa.org/client/search/asset/5683>

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:

<http://alsrsa.org/client/search/asset/4346>

How to Replace the WorkFlows Configuration Folder on Windows 10:

<http://alsrsa.org/client/search/asset/5684>

Questions??

Contact the RSA help desk at [rsahelp@railslibraries.info](mailto:rsahelp@railslibraries.info) or RSA staff at 866-940-4083