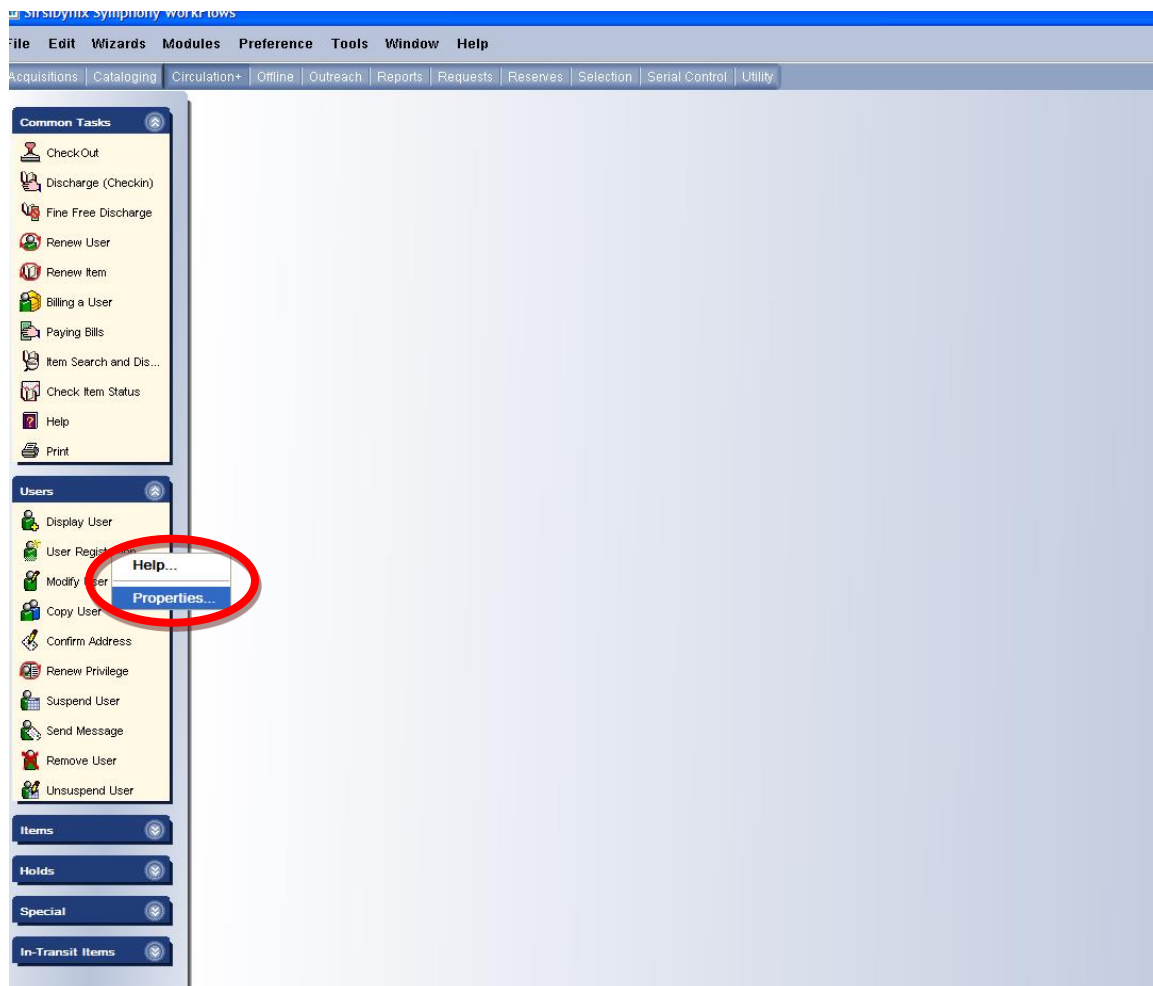


User Registration for Academic Libraries

Revised March 2018

Setting Properties:

Properties need to be set once on each computer that will be used to register students and faculty.



1. Log onto WorkFlows using the CIRC, TECH or your individual cataloging login.
2. In the Circulation module, place the cursor on the "User Registration" wizard in the "User" toolbar and right click the mouse.
3. Select "Properties' from the drop down menu.

4. On the “User Registration: Set Properties” pop up box check the following:

Library: Select your library’s WorkFlows name from the drop down list.

Profile name: Select a profile name from the drop down list that will be used with the majority of your patrons. (The Profile name drop down list can be customized to contain only the profiles you use. To get accurate statistics you must be consistent when selecting a Profile name from the drop down list.).

Available user profiles for academic institutions:

STUDENT
 STUDENT 1
 STUDENT 2
 STUDENT 3
 STUDENT 4
 S-STAFF
 FACULTY
 FAC-FT (full time faculty members)
 FAC-PT (part time faculty members)

Charge history rule: Leave at the default of NOHISTORY.

Track charges as Favorites: Uncheck the box.

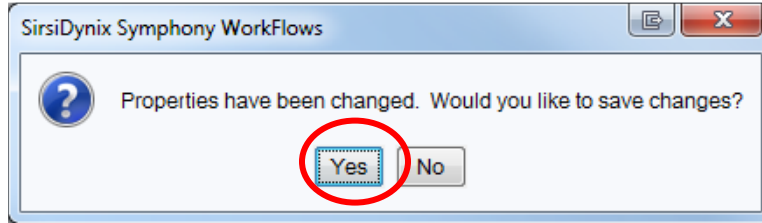
Usercat1: Select your library’s WorkFlows name from the drop down list.

Usercat6: (Optional) When entering a class of students the graduation year can be selected from the drop down menu.

These settings are now the default settings for the “User Registration” wizard.

5. Click the “OK” button on the bottom of the “User Registration: Set Properties” pop up box.

When you close this session of WorkFlows you will receive the following popup box:



Click "Yes" to save the settings.

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.

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:

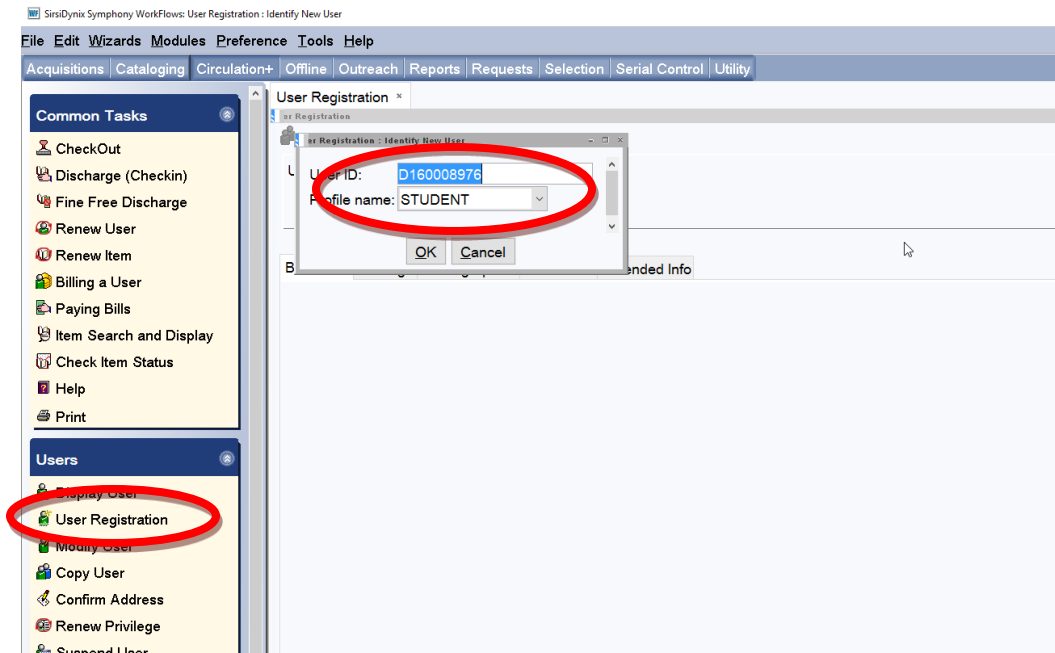
<http://alsrsa.org/client/search/asset/4346>

How to Replace the WorkFlows Configuration Folder on Windows 10:

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

Before registering a new patron, review the following document:
[Resource Sharing Alliance Patron Registration Standards](#)

Registering Patrons



1. Open the “User Registration” wizard and enter the following information into the “User Registration: Identify New User” pop up box:

User ID: Enter a new user ID number from your library’s barcodes.
Profile name: This box contains the default from the properties settings.
Use the drop down menu to select a different profile name.
2. Click the “OK” button on the bottom of the “User Registration: Identify New User” pop up box.

3. Click on the Basic Info tab and enter information on the Basic Info tab using the [Resource Sharing Alliance Patron Registration Standards](#).

First Name: Enter the first name of the student, staff or faculty member.

Preferred name: (Optional) Enter the preferred name of the student, staff or faculty memberPI.

Use preferred name: (Optional) Check this box if you have entered information in the “Preferred name” box and would like the preferred name to appear on the student’s overdues, bills, and courtesy notices.

Middle name: Enter the middle name or middle initial of the student, staff or faculty member.

Alt ID: (Optional) An alternative ID number may be entered such as a student ID number. The Alt ID can be searched. Reports cannot be run using the Alt ID.

Group ID: (Optional) The Group ID box can be used to enter information for a group of patrons, i.e. field of study, graduation years, etc. Reports can be run using the Group ID. To get accurate statistics you must be consistent when entering information in the Group ID box.

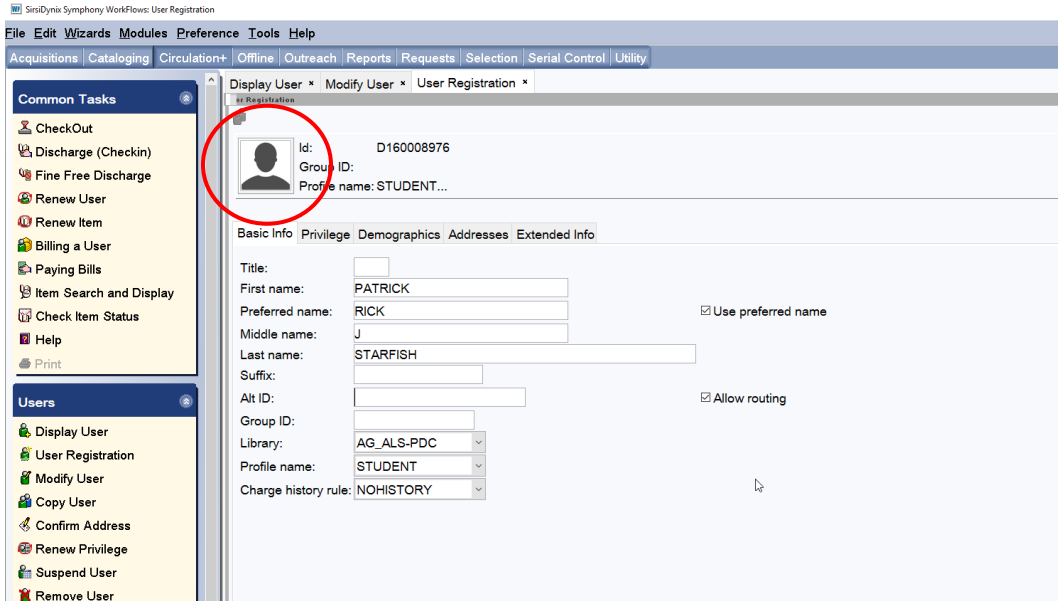
Allow routing: Used by to route serials by libraries using the serial module.

Library: Default library name from the properties settings.

Profile Name: Default user profile from the properties settings.

Charge history rule: Defaults to NOHISTORY. For the patron’s privacy the only way this can be activated is for the patron to activate it themselves through the RSACat. Please see the [Enabling Patron Circ History](#) document for information on activating patron’s charge history.

Optional: Patron Photo: The patron photo option is available by enabling the property logged into WorkFlows using the Supervisor log in. Please see [Patron Photos in Workflows Cheat Sheet](#) for information on adding patron photographs.




4. Click on the Privilege tab and fill in the Privilege tab using the following:

The screenshot shows the WorkFlows User Registration interface. The left sidebar contains navigation menus for Common Tasks, Users, Items, and Holds. The main window displays the 'User Registration' form with the 'Privilege' tab selected. The form fields are as follows:

Field	Value	Override
Id:	D160008976	
Group ID:		
Profile name:	STUDENT...	
Privilege expires:	3/20/2022	
PIN:	5007	
Status:	OK	
Claims returned:		
Web auth id:		
BLUEcloud staff ID:		

Buttons at the bottom: Save, Check Duplicate User, Register Another User, Close.

Privilege Expires: This box contains the default expiration date. The default expiration date can be changed by typing a new date in this format; 6/15/2015 or using the gadget  at the end of the Privilege expires box. (The default expiration date for STUDENTS is 4 years; FACULTY and S-STAFF is 3 years.)

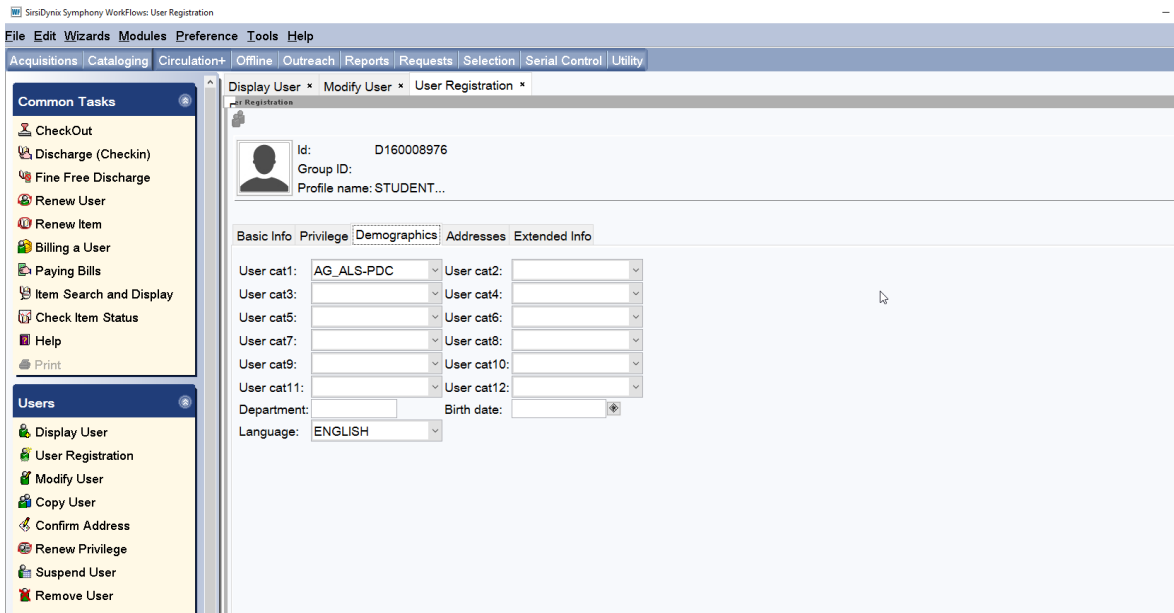
Pin: WorkFlows automatically generates a random pin number when a new user is being created. A library can select to have WorkFlows supply a library-wide default pin when the user is created. The default pin can be from 1 to 10 characters composed of letters, numbers or a combination of both or the last 4 or 5 digits of the patron's user ID. To setup a library-wide default pin for your patrons contact the RSA help desk at rsahelp@railslibraries.info. Patrons use their pins to access his or her account via RSACat or to access eBooks. Patrons can change their pin by accessing their account online. If a patron changes their pin online, the pin will automatically change in WorkFlows. After a patron's account has been created, their pin can only be view using the Modify User Wizard in WorkFlows.

Override: If information in either the Privilege Expires box or Pin box are change enter the RSA override (RSA) in the Override box.

Claims Returned: This box is blank.

Web auth id: This box is blank

BLUEcloud staff ID: This box is blank



5. Open the Demographics tab and fill in the Demographics tab using the following:

User cat 1: Defaults to WorkFlows library name entered in the properties settings.

User cat 2: (Optional) Use to select the gender and/or age range of the patron.

User cat 3: (Optional) Contains zip codes and options for user's residence statistics.

User cat 4: (Optional) Contains general options for statistics and contact information that print on hold wrappers.

User cat 5: (Optional) Contains options that can be used with PC Reservation and contact information that print on hold wrappers.

User cat 6: Contains graduation years for school libraries.


User cat 7: Used by public libraries who have Intergovernmental agreements with local schools.

Department: (Optional) Used for statistics. Reports can be run using the Department. To get accurate statistics you must be consistent when entering information in the Department box.

User cat 8: Use to track program and rewards.

User cats 9, 10, 11: Blank

User cat 12: Contact RSA to add codes to track specific user statistics

Birth date: (Optional) Enter the patron's birthday using this format; 6/15/2015 or using the gadget  at the end of the Birth date box.

Language: The default is English

6. Open the Address tab and fill in the Address tab using the following:

Primary: Defaults to Address 1. Select the address to be used for mailing notices.

Address 1:

Phone: Enter the user's primary telephone number.

Dayphone: Enter a secondary telephone number for the user.

Street: Enter the street name and number following the guidelines in the [Resource Sharing Alliance Patron Registration Standards](#).

City/State: Enter the city and state following the guidelines in the [Resource Sharing Alliance Patron Registration Standards](#).

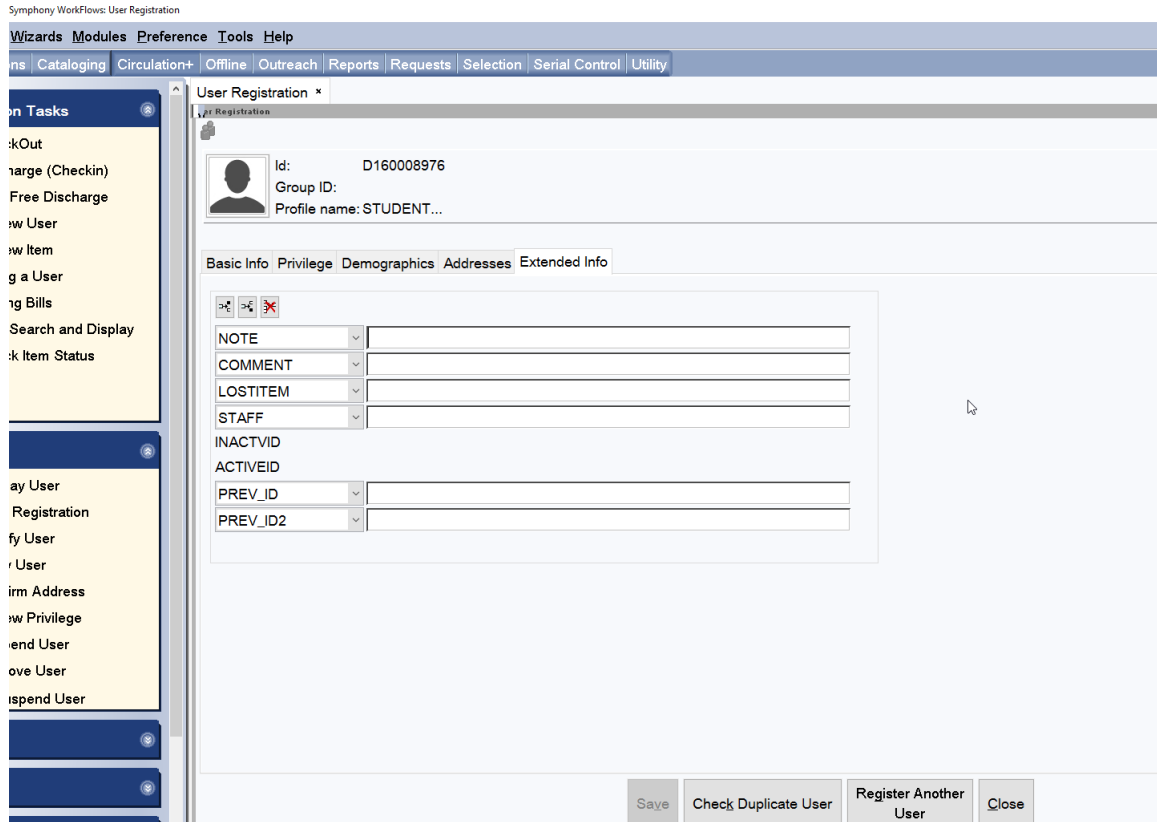
Email: Enter the patron's email. If an email is entered in this box, user's bills and holds, overdue and courtesy notices (contact the RSA System Coordinator for setup) will be automatically sent to the patron. (Multiple emails can be entered into the EMAIL box. Separate emails with a comma, no spaces. Example:

pstarfish@oceana.aargh,pstarfish@yohoogle.net)

Care/of: Enter a name of a parent or guardian.

Address 2 and Address 3: Can be used to enter alternate addresses for the users. When the user is using one of the alternate addresses, the appropriate Primary radio button at the top of the Address tab must be selected.

Important: NEVER change the label of the boxes on the Address tab.

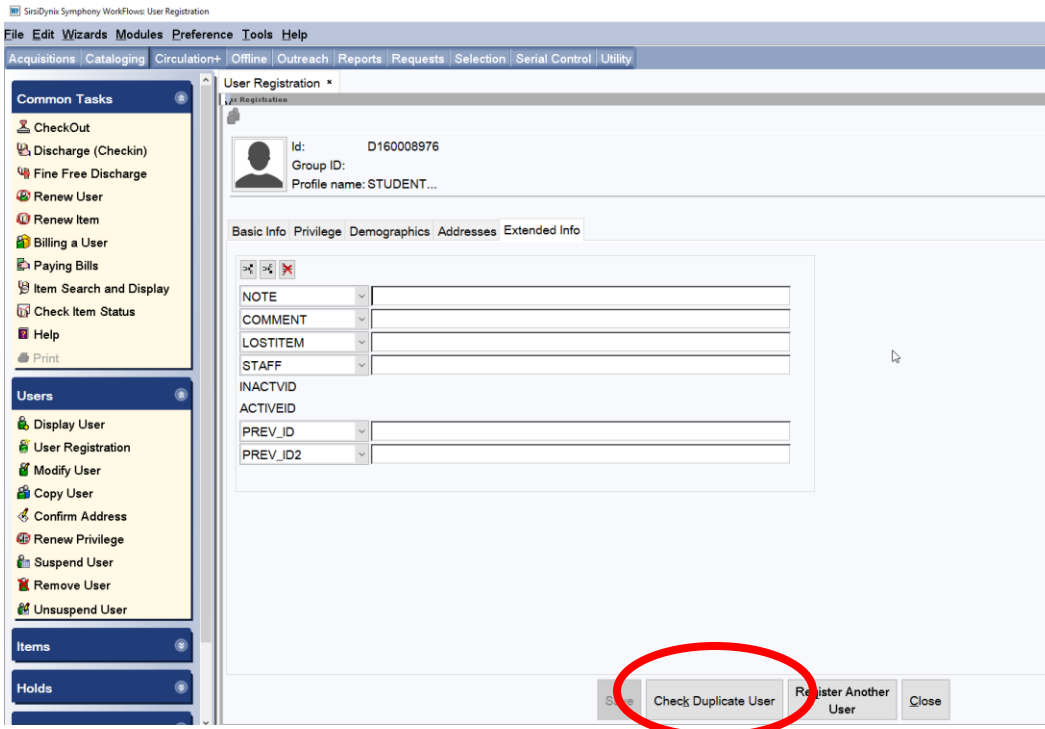


7. *Extended Tab:* (Optional) Extended tab information displays during circulation.

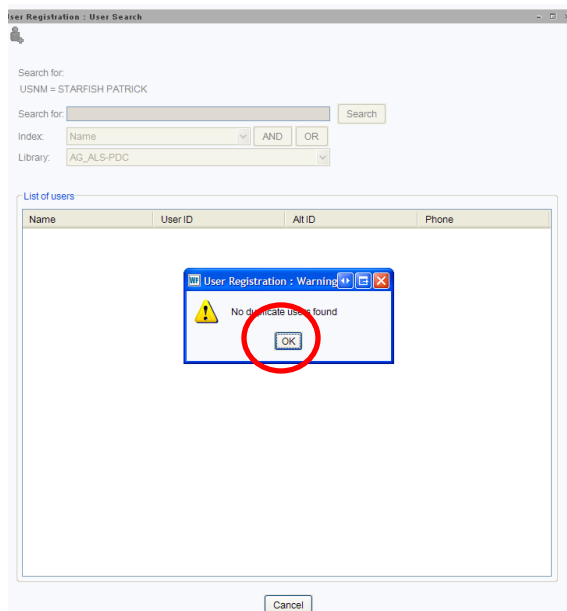
Note-Comment-LostItem-Staff: Enter notes that will appear when accessing the patron’s account during circulation activities.

Follow the RSA Patron Notes Standard when entering notes:
<http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/2081>

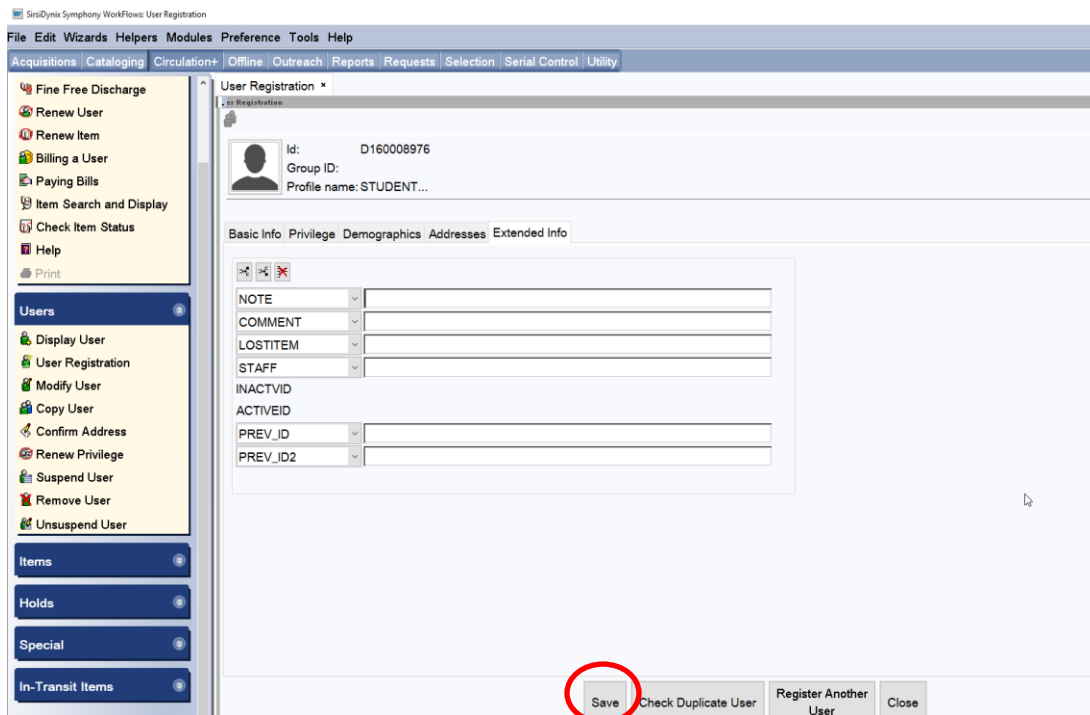
Important: NEVER change the label of the boxes on the Extended Info tab.



- 8. Once all the tabs in the User Registration wizard are completed, click the “Check Duplicate User” button on the bottom of the User Registration screen.

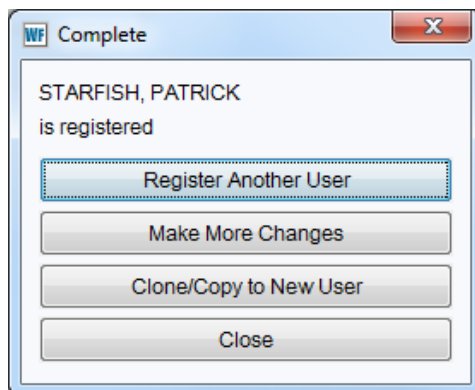


- 9. If no duplicate user is found a “Warning” box will pop up.
 - a. Click the ‘OK’ button on the “Warning” popup box.



b. Click the “Save” button to save the user’s registration.

c. The complete box will pop up with four options:



Register Another User: Clicking this button will return you to “User Registration: Identify New User” pop up box to register an additional user. (Step 1)

Make More Changes: Click this button to immediately return to the user’s account information to make changes

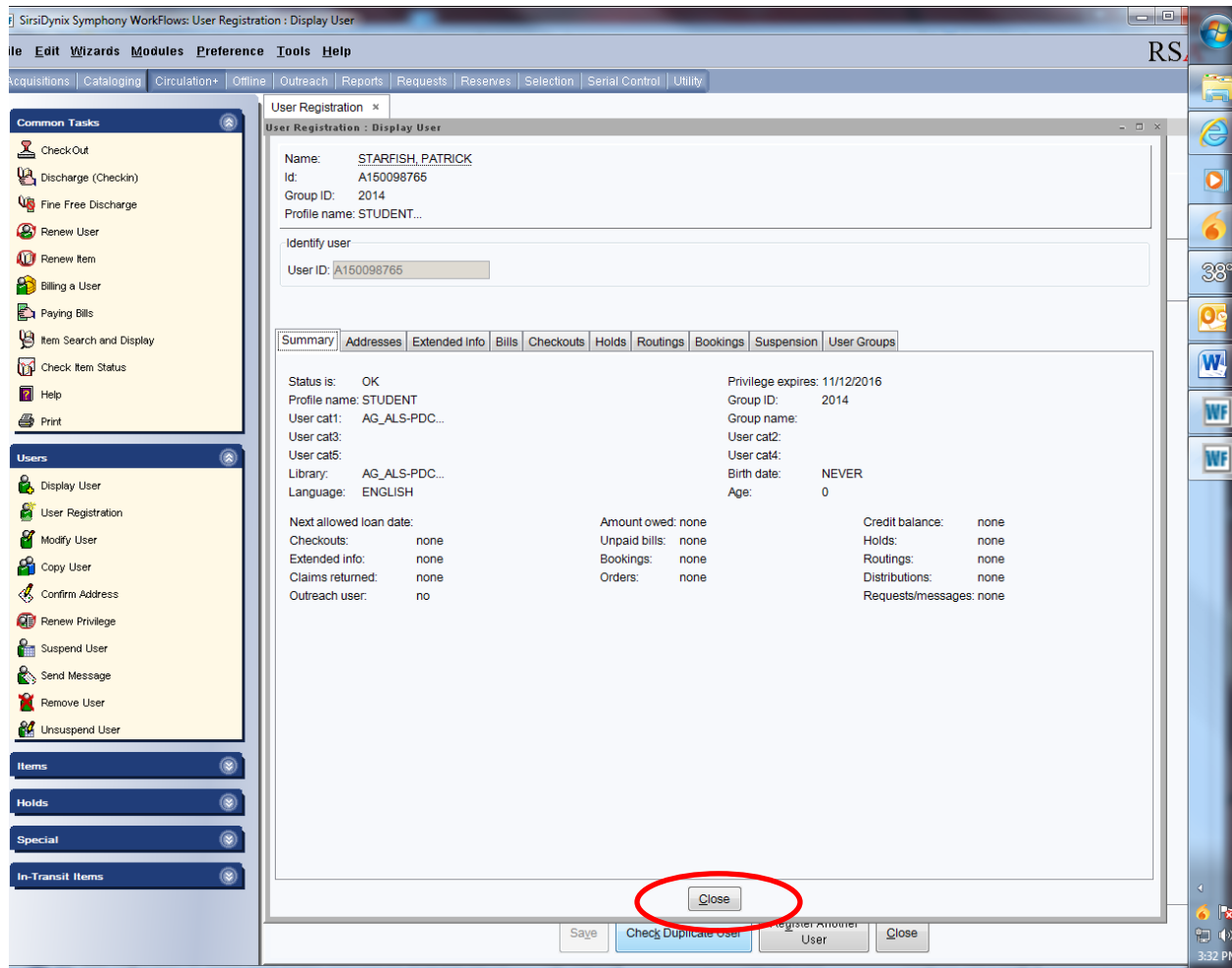
Clone/Copy to a New User: (Don’t Use) Use this button to retain address information if registering multiple users with the same address.

[\(Copy/Clone User during User Registration\)](#)

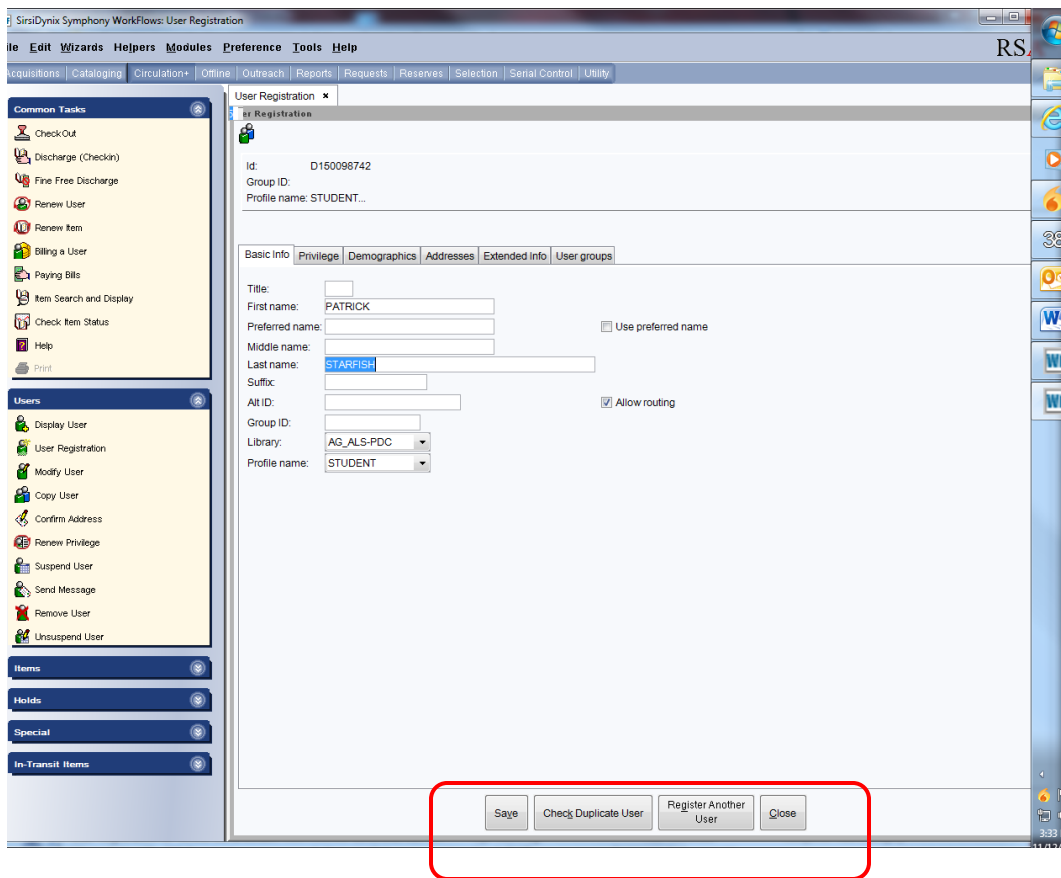
Close: Click to close the “User Registration” wizard.

10. If after, clicking the “Check Duplicate User” button, a match is found, One of the following screens will appear:

Single User: The User Registration: Display User” box will appear if the “Check Duplicate User” button finds a match on a single user.



- Check the information on the “User Registration: Display User” pop up box against the information being entered in the “User Registration” wizard.
- Click “Close” on the bottom of the “User Registration: Display User” pop up box.

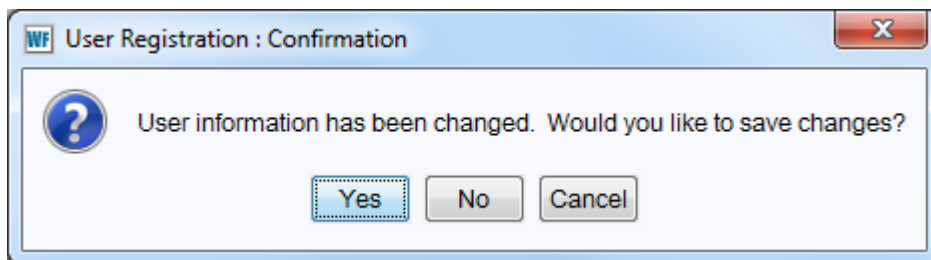


User Registration buttons:

Save: If no duplicate user is found, click the “Save” button to save the information.

Register Another User: Click this button if you do not want to save the information and do want to register another user. You will see the “User Registration: Confirmation” popup box.

Close: To close the “User Registration” wizard without saving the patron information. You will see the “User Registration: Confirmation” popup box.



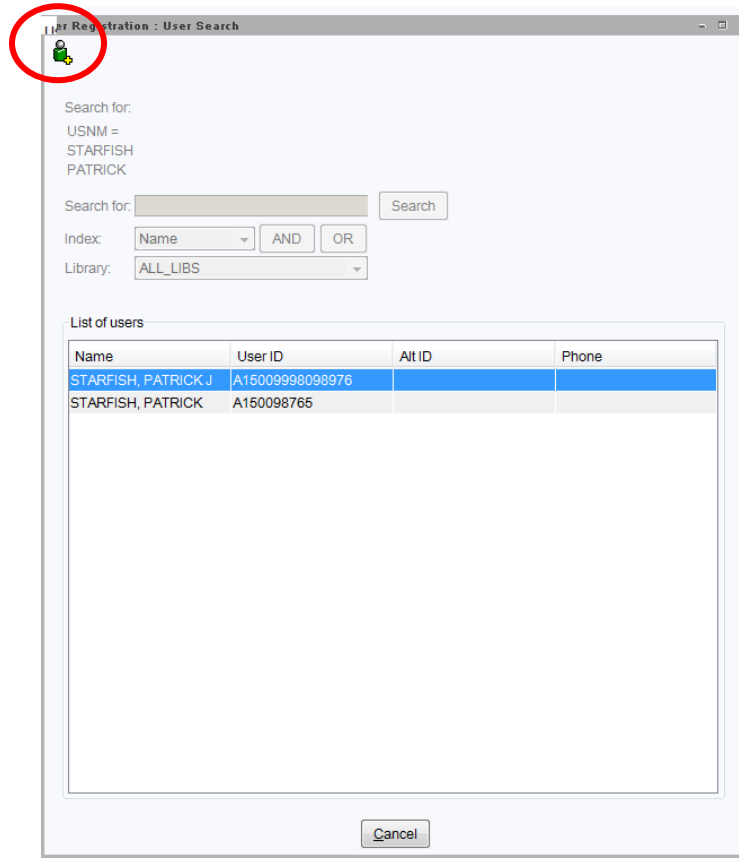
“User Registration: Confirmation” popup:

Yes: Will save the changes

No: will return you to step 1

Cancel: will cancel the popup box and allow you to make changes to the current user registration account.

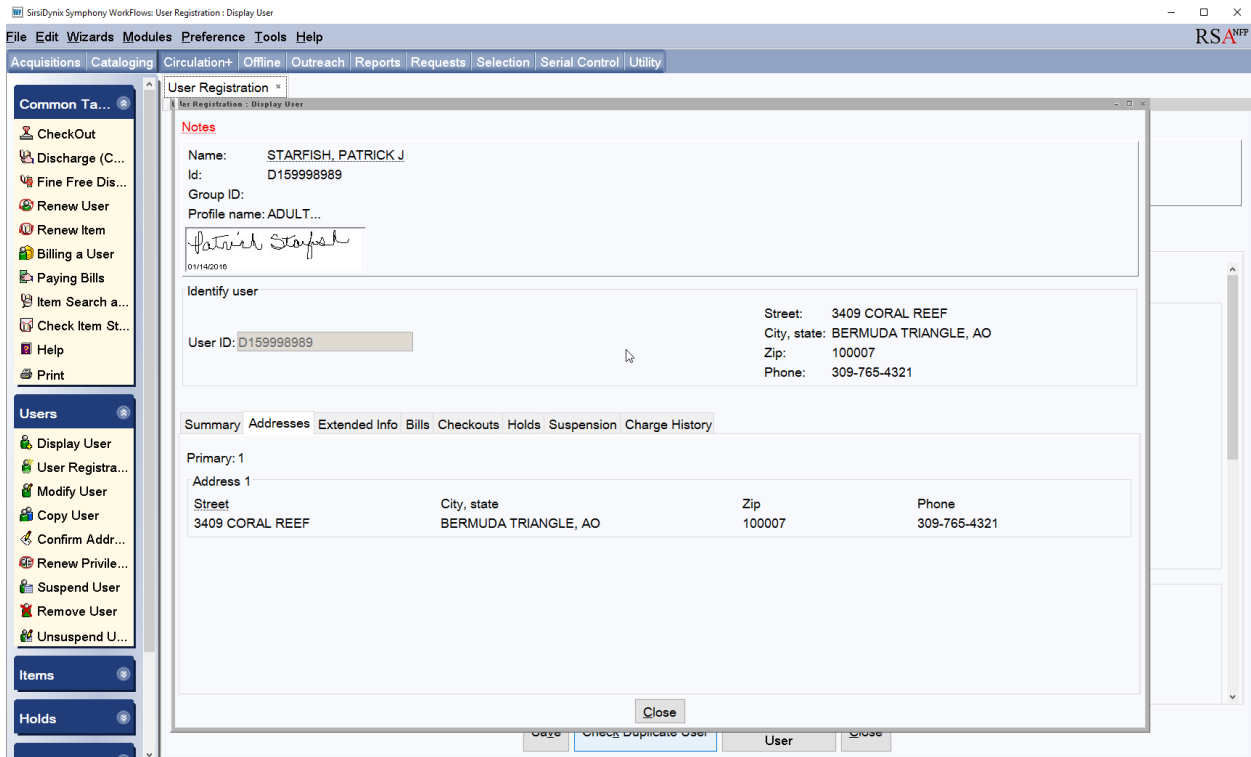
Multiple Users: If more than one user is found using the “Check Duplicate User” button the “User Registrtion: User Search” box will pop up.



“User Registrtion: User Search” popup:

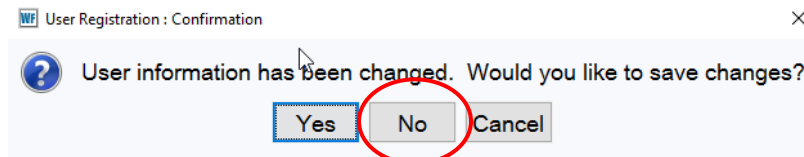
- Highlight a user name in the ‘List of users’ display.
- Click the “User Search” helper in the upper left corner of the “UserRegistration: User Search” popup box.

c. The “User Registration: Display User” box will open.



- d. On the “User Registration: Display User” pop up box:
- Review the user information on the Summary and Address tab.
 - i. If the information matches and the user account belongs to your library:
 - a) Click the Close button at the bottom of the “User Registration: Display User” pop up box.
 - b) Click the Cancel button at the bottom of the “User Registrtion: User Search” popup box.
 - c) Close the “User Registration” wizard

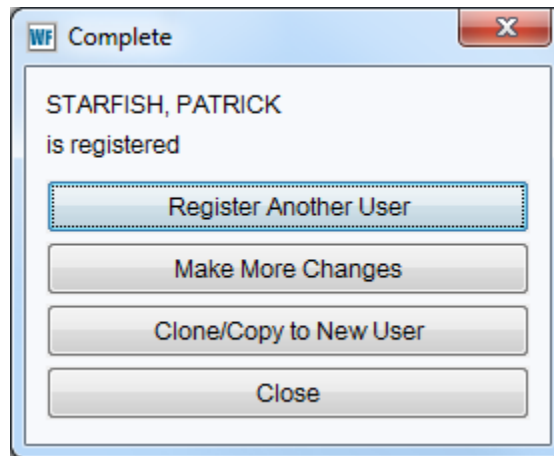
The “User Resistration: Confirmation” box will pop up



Select No and do not register the patron.

- ii. If the information does not match, or matches and belongs to a school, public, or another academic library :
 - a) Click the Close button at the bottom of the “User Registration: Display User” pop up box.
 - b) Click the Cancel button at the bottom of the “User Registrtion: User Search” popup box.
 - c) Click the “Save” button on the bottom of the “User Registration” screen.

- d. The “Complete” box will pop up with four options:



Register Another User: Clicking this button will return you to “User Registration: Identify New User” pop up box to register an additional user. (Step 1)

Make More Changes: Click this button to immediately return to the user’s account information to make changes

Clone/Copy to a New User: (Don’t Use) Use this button to retain address information if registering multiple users with the same address.

[\(Copy/Clone User during User Registration\)](#)

Close: Click n to close the “User Registration” wizard.

Questions??

Contact the RSA help desk at help@rsanfp.org or RSA staff at 866-940-4083