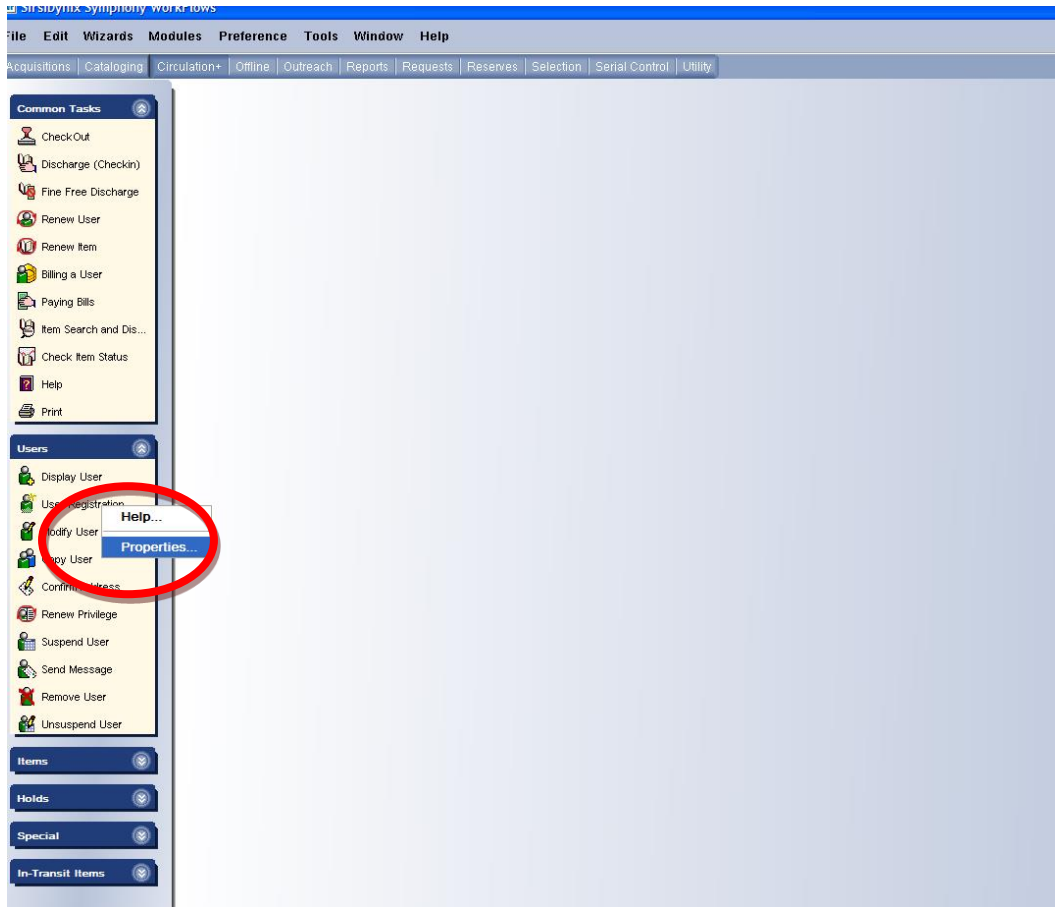


User Registration for School Libraries

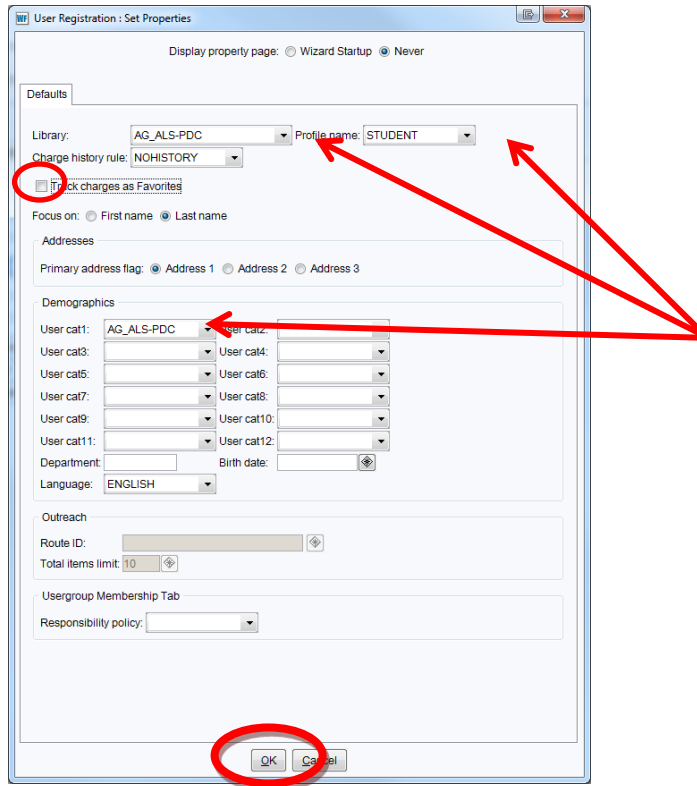
Revised March 2018

Setting Properties:

Properties will 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 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 schools:

- 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.

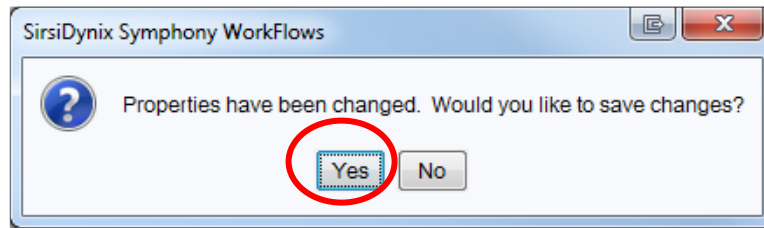
Usercat1: Select your library’s WorkFlows name from the drop down list.

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:

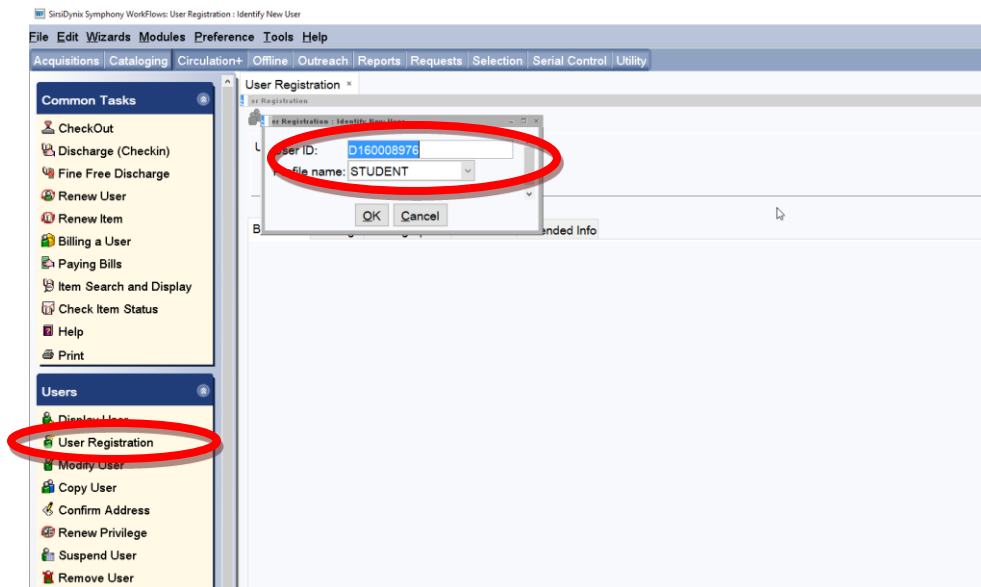
<http://alsrsa.org/client/search/asset/4346>

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 documents:
[Resource Sharing Alliance Patron Registration Standards](#)

Registering Students and Faculty

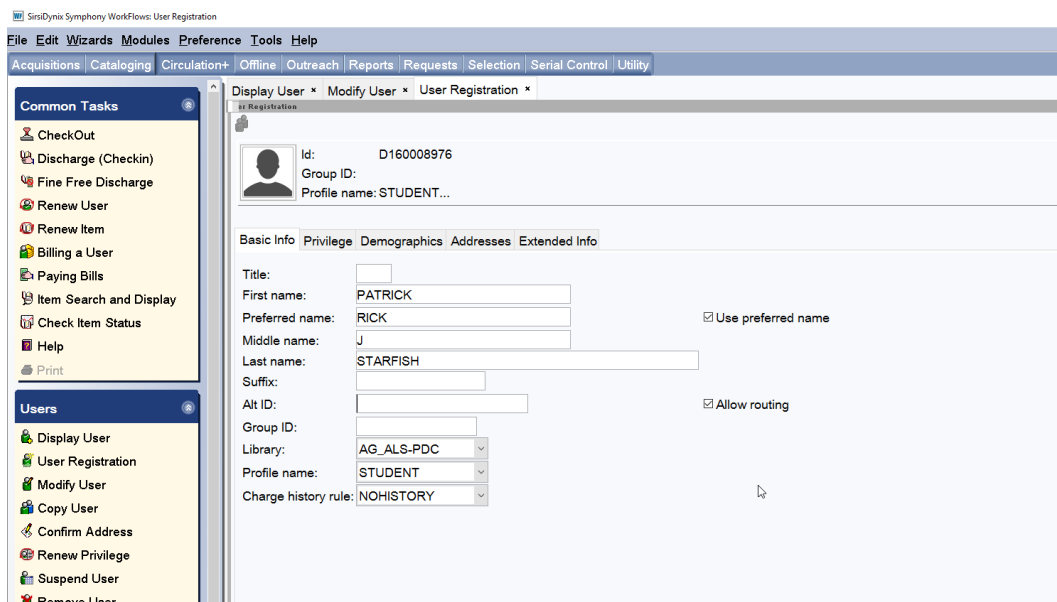


1. Open the “User Registration” wizard and enter the following information into the “User Registration: Identify New User” pop up box:

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 for staff or faculty.

2. Click the “OK” button on the bottom of the “User Registration: Identify New User” pop up box.



3. Click the Basic Info tab and enter information on the Basic Info tab using the [RSA Patron Names 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 member.

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.

Last name: Enter the last name of 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 may be used to enter the student’s graduation year or the name of a homeroom teacher. Reports can be run using the Group ID. To get accurate statistics you must be consistent when entering information in the Group ID box.

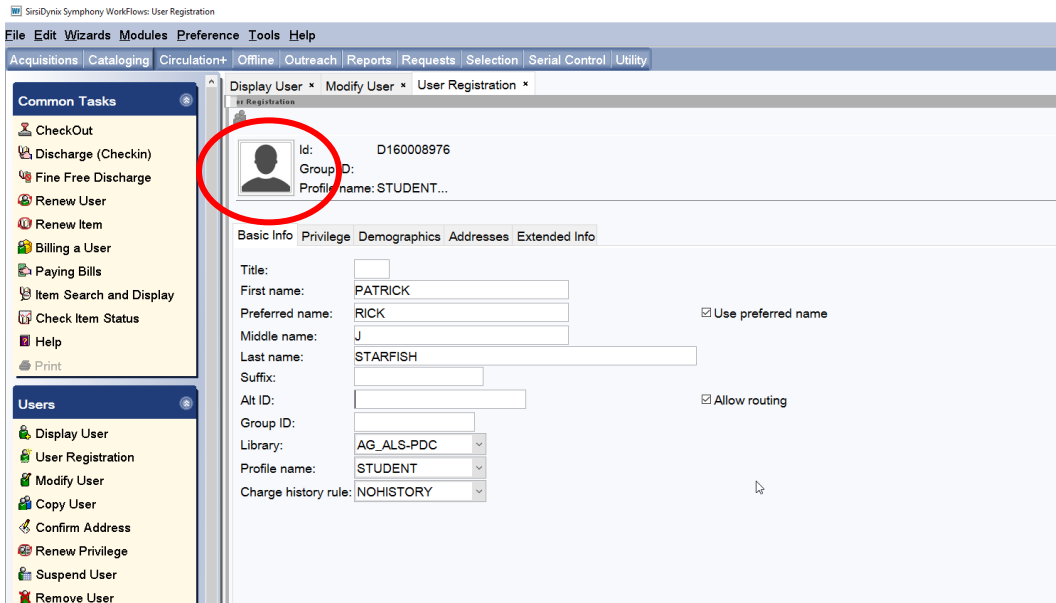
Allow routing: Used by to route serials by libraries using the serial module.

Library: Default library name from the properties settings.

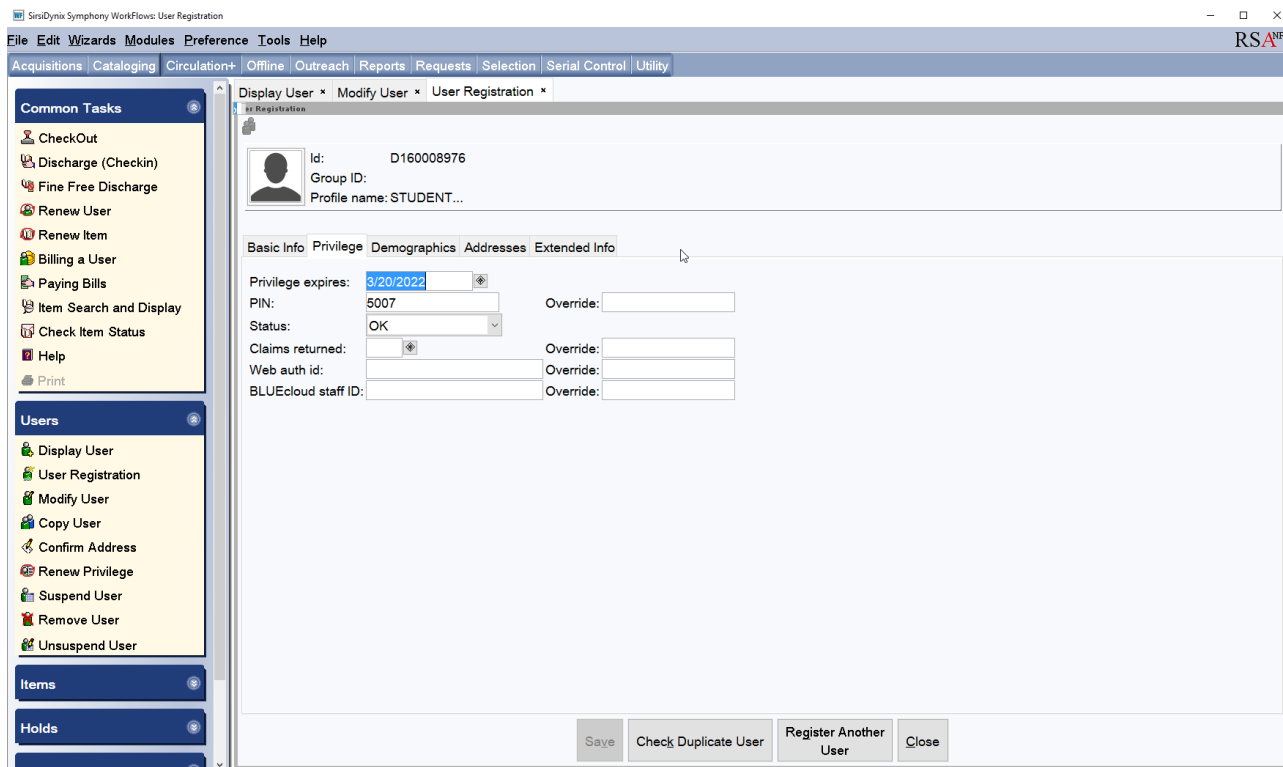
Profile Name: Default user profile from the properties settings.


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.

4. 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.



5. Click the Privilege tab and fill in the Privilege tab using the following:



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. The default expiration date for faculty and staff is 3 years.) The expiration date can be changed to June of the students graduation year.

Pin: WorkFlows automatically supplies 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 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. If your students will not be accessing their accounts via the OPAC (RSACat) then you can skip this box. If your students will be accessing their account via the OPAC it is suggested that the pin be changed to a generic pin. (Possibly your school mascot) The students can then change their pin by accessing their account online. If a student changes their pin via the OPAC the pin will automatically be changed 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 edited then the RSA override (RSA) will need to be entered in the Override box.

Claims Returned: This box is blank.

Web auth id: This box is blank
BLUEcloud staff ID: This box is blank

SirsiDynix Symphony Workflows: User Registration

File Edit Wizards Modules Preference Tools Help

Acquisitions Cataloging Circulation+ Offline Outreach Reports Requests Selection Serial Control Utility

Common Tasks

- CheckOut
- Discharge (Checkin)
- Fine Free Discharge
- Renew User
- Renew Item
- Billing a User
- Paying Bills
- Item Search and Display
- Check Item Status
- Help
- Print

Users

- Display User
- User Registration
- Modify User
- Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Remove User
- Unsuspend User

Display User * Modify User * User Registration *

Registration

Id: D160008976
Group ID:
Profile name: STUDENT...

Basic Info Privilege Demographics Addresses Extended Info

User cat1: AG_ALS-PDC User cat2:
User cat3: User cat4:
User cat5: User cat6: 2021
User cat7: User cat8:
User cat9: User cat10:
User cat11: User cat12:
Department: Birth date:
Language: ENGLISH

6. Click the Demographics tab and fill in the Demographics tab using the following:

User Cat1: Default should be your library's WorkFlows name.

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

User Cats 3-5: These boxes will remain blank.

User Cat6: Select the student's graduation year from the drop down menu.

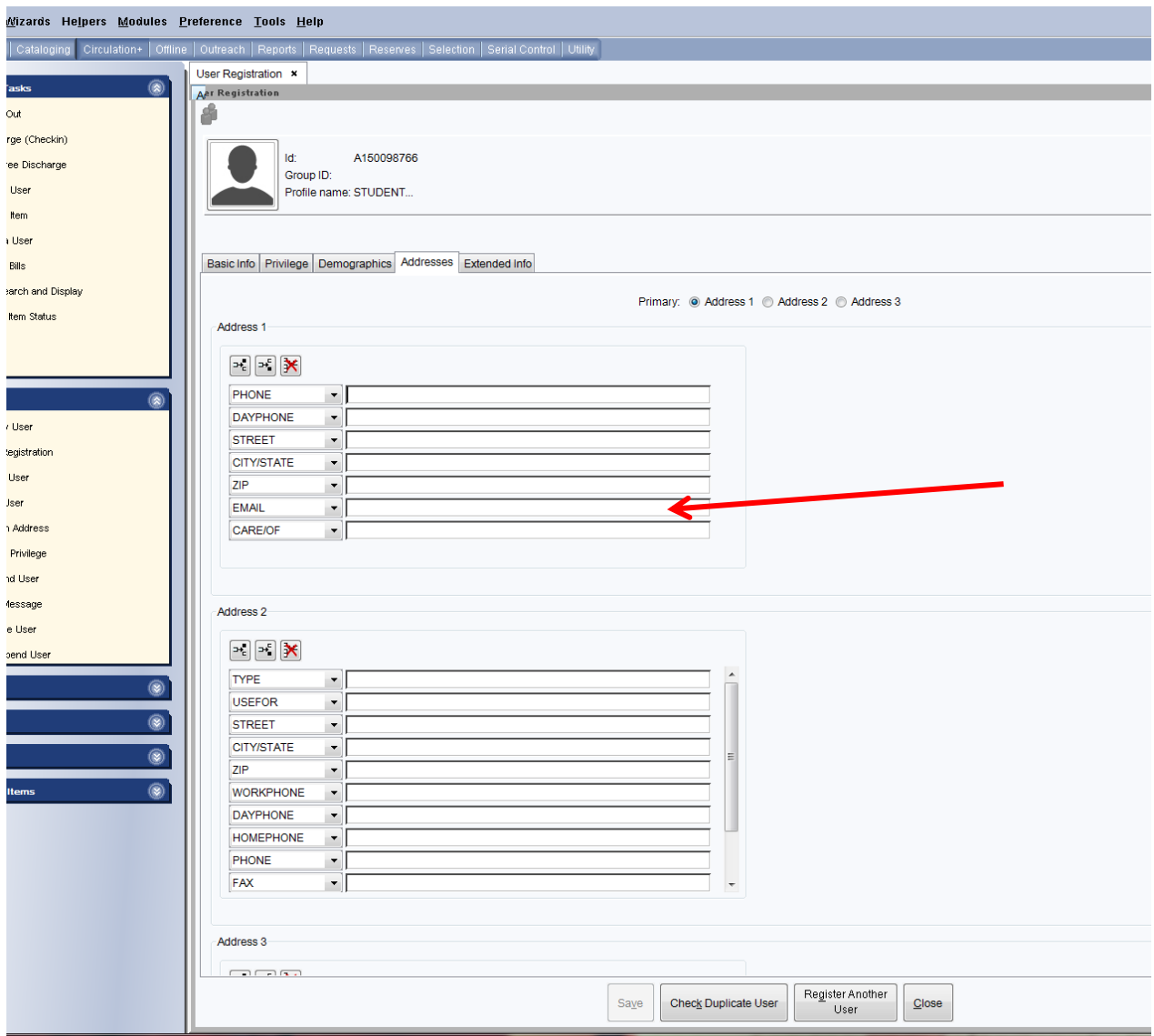
User Cats 7-12: These boxes will remain blank.

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

Language: The default is English

Birth date: Leave blank

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



7. Address tab: (Optional)

If your students have email addresses they can be entered into the EMAIL box on Address 1.

If an email address is entered into the EMAIL box:

An email can be sent 3 days before an item is due (Contact the RSA System Coordinator for setup)

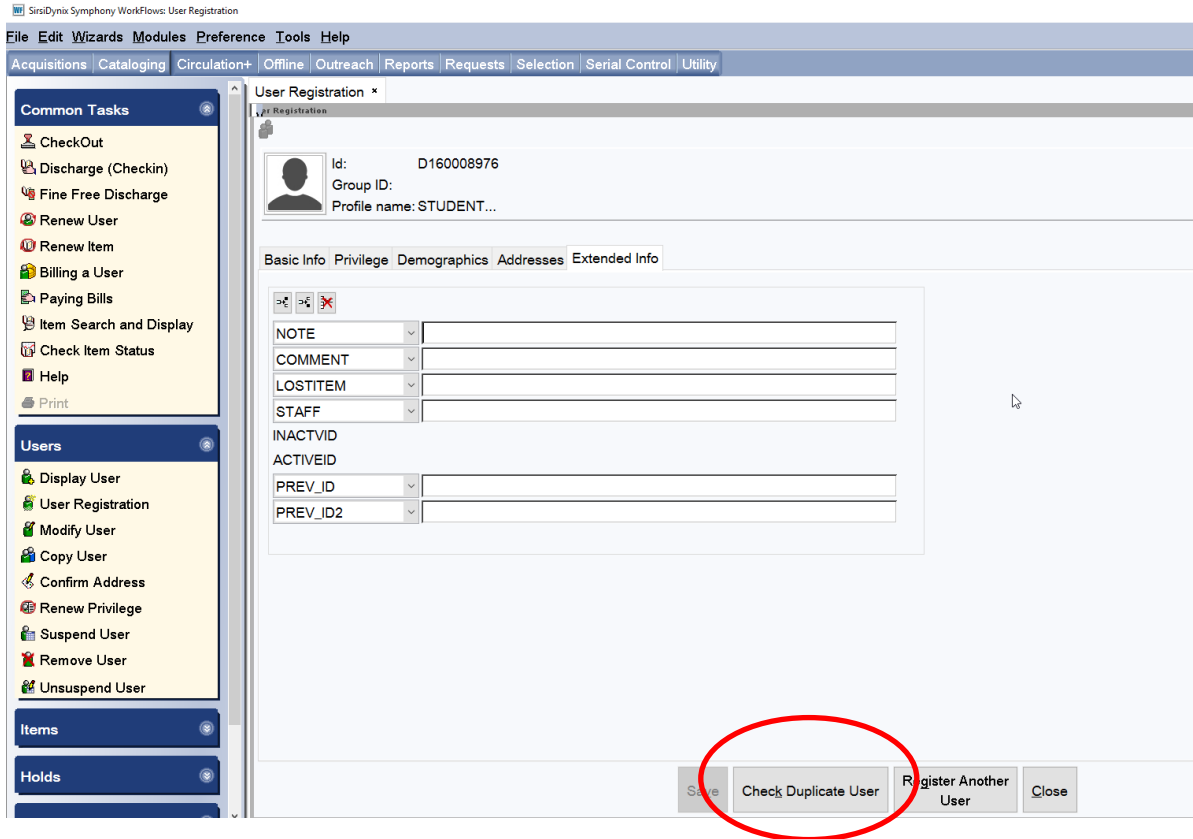
Overdues can be sent via email

Bills can be sent via email

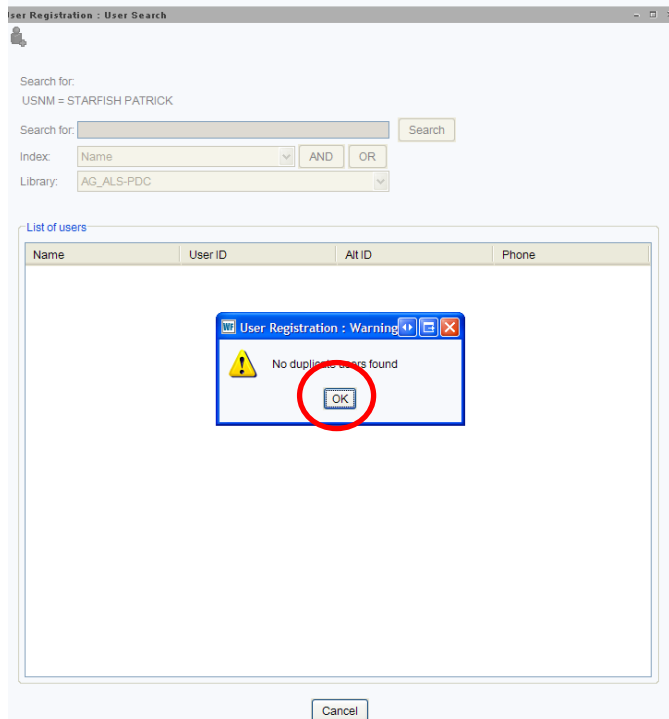
(Multiple emails can be entered into the EMAIL box. Separate emails with a comma, no spaces. Example:

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

Important: NEVER change the labels of the drop down boxes on the Address tab.

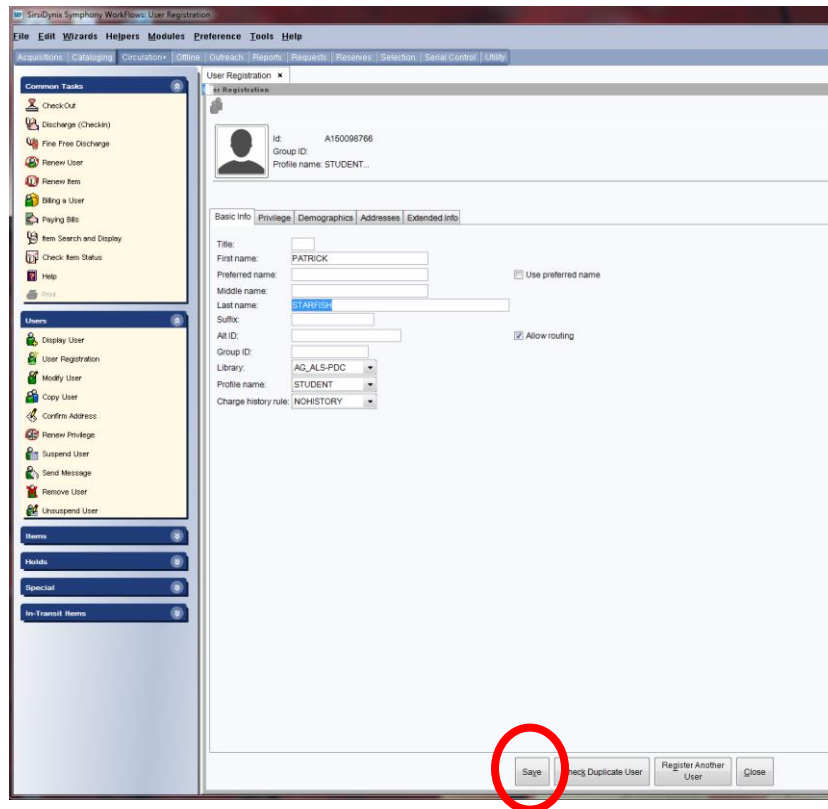


8. Once all the tabs in the User Registration wizard are completed, click the “Check Duplicate User” button on the bottom of the User Registration screen.

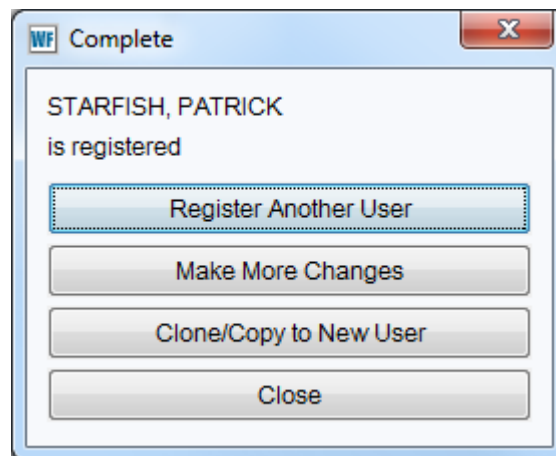


9. If no duplicate user is found a “Warning” box will pop up.

- 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; page 4)

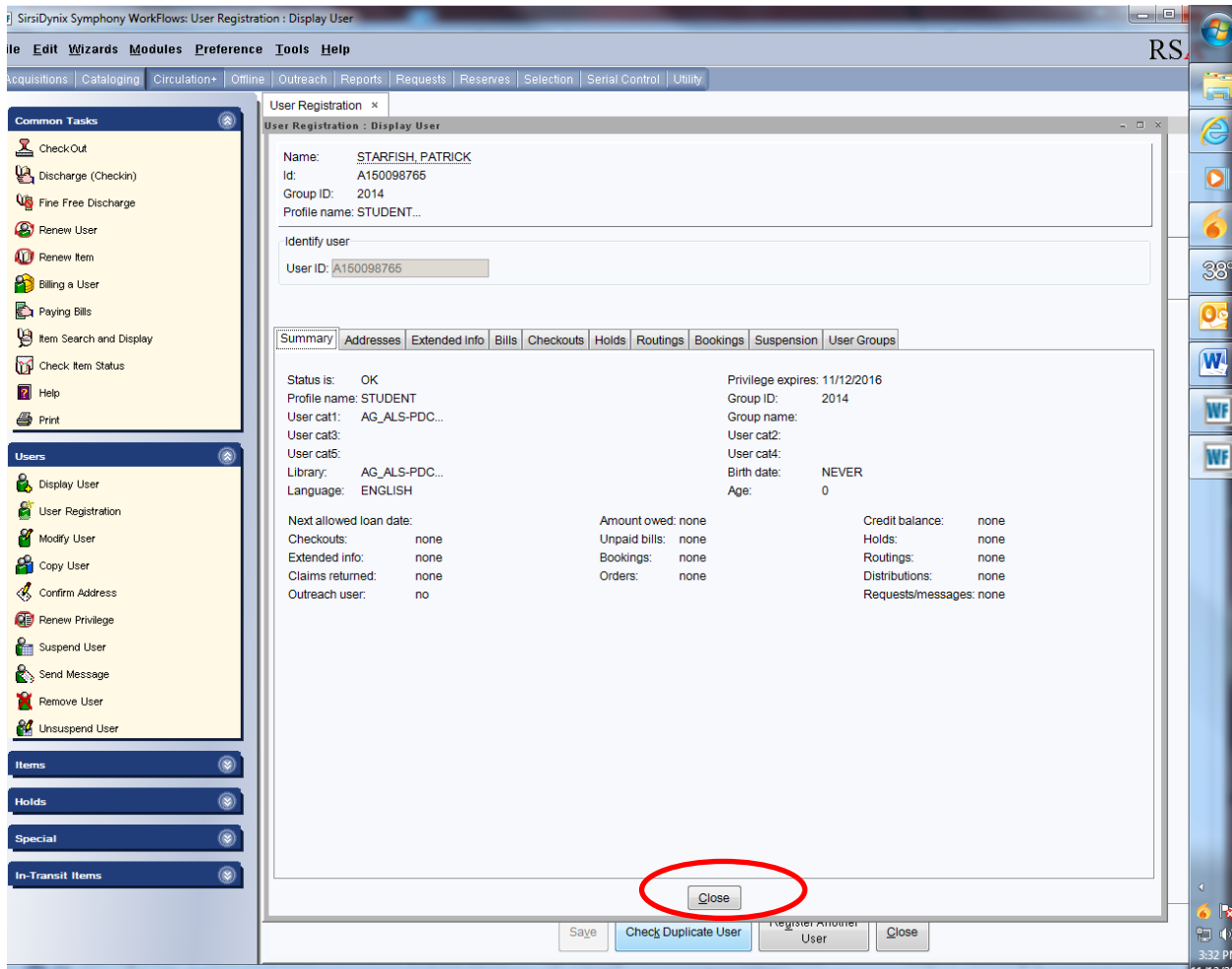
Make More Changes: Click this button to immediately return to the user’s account information to make changes

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

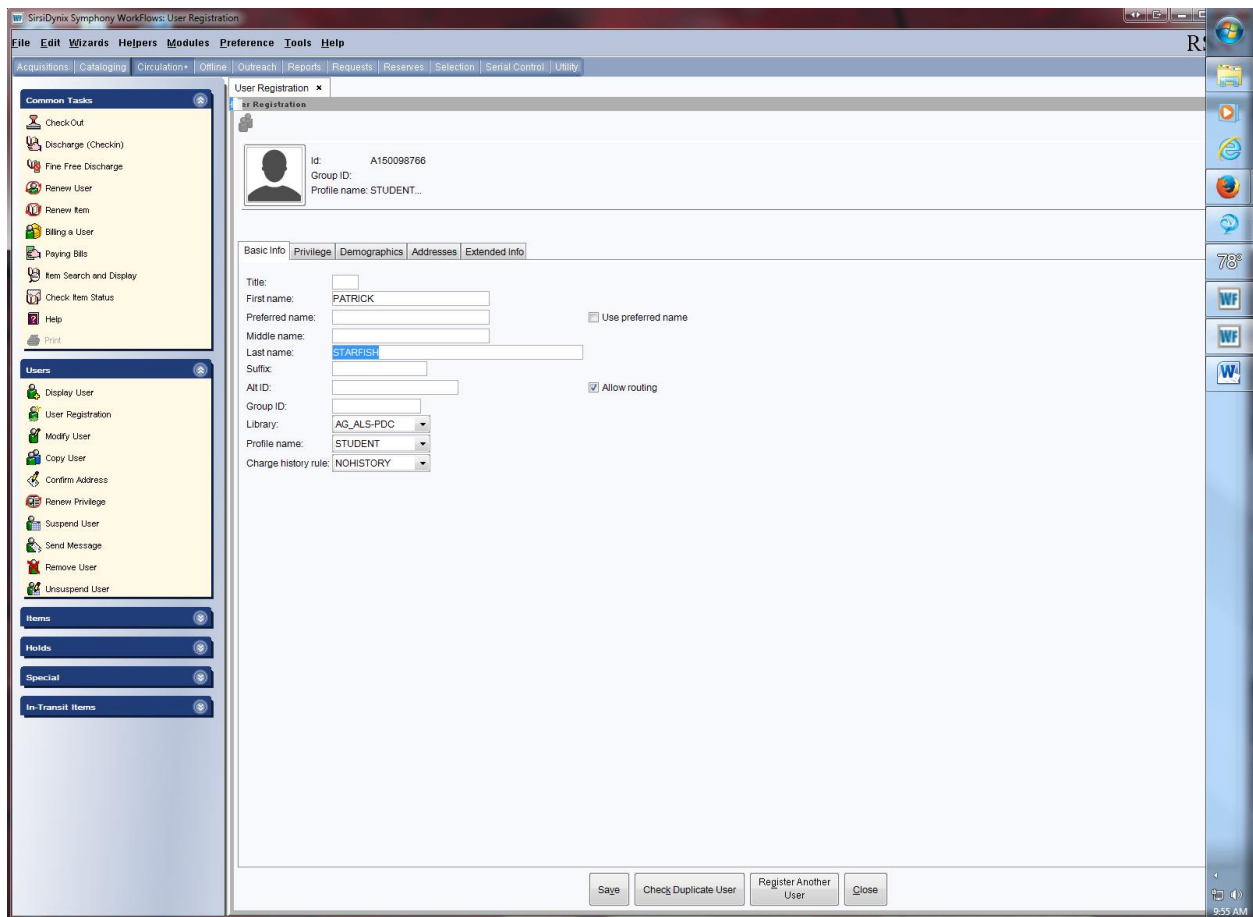
Close: Click this button to close the “User Registration” wizard.

10. If a match is found after clicking the “Check Duplicate User” button, 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.



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

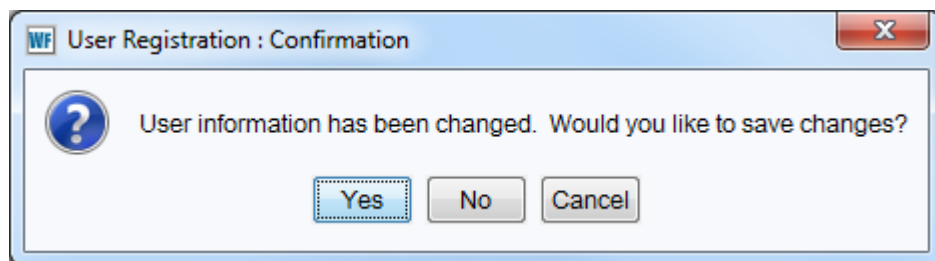


User Registration buttons:

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 a different user. You will see the “User Registration: Confirmation” popup box. (Below)

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



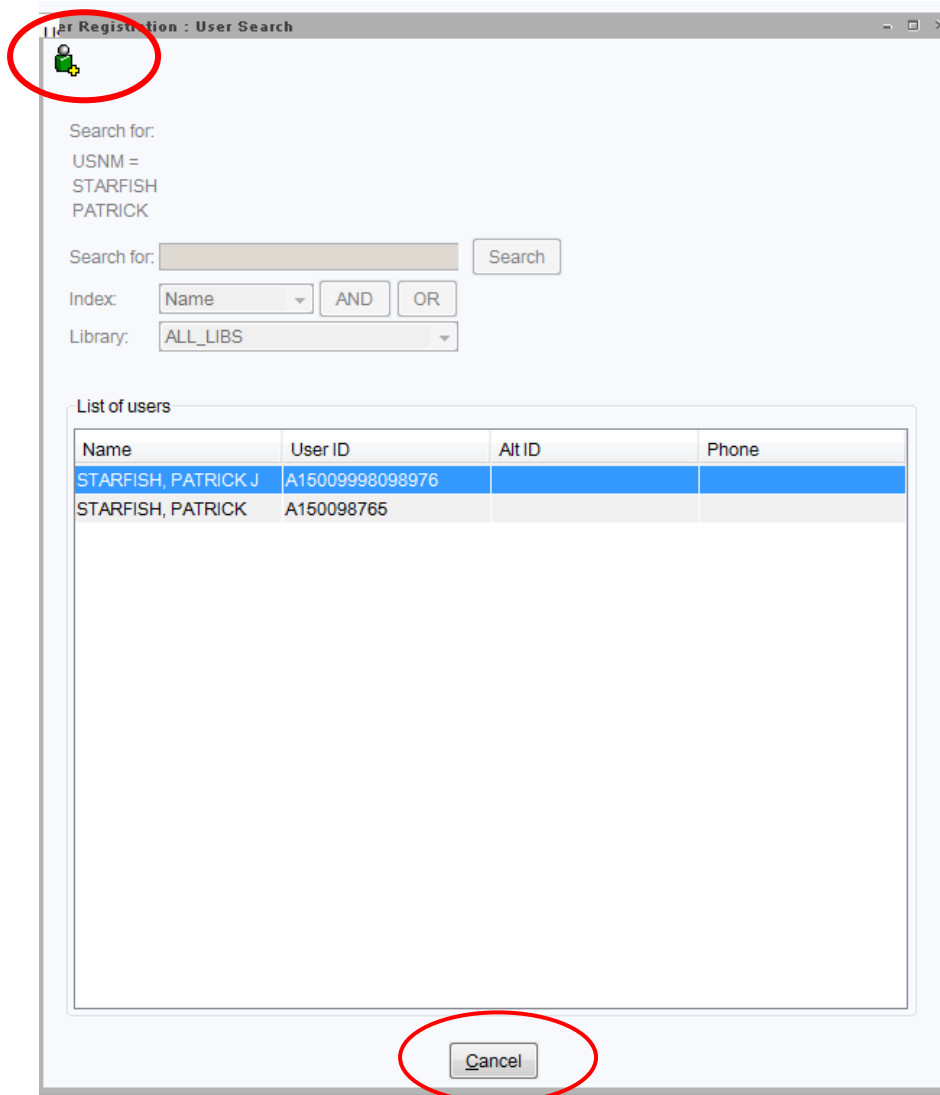
“User Registration: Confirmation” popup:

Yes: Will save the changes

No: will return you to step 1

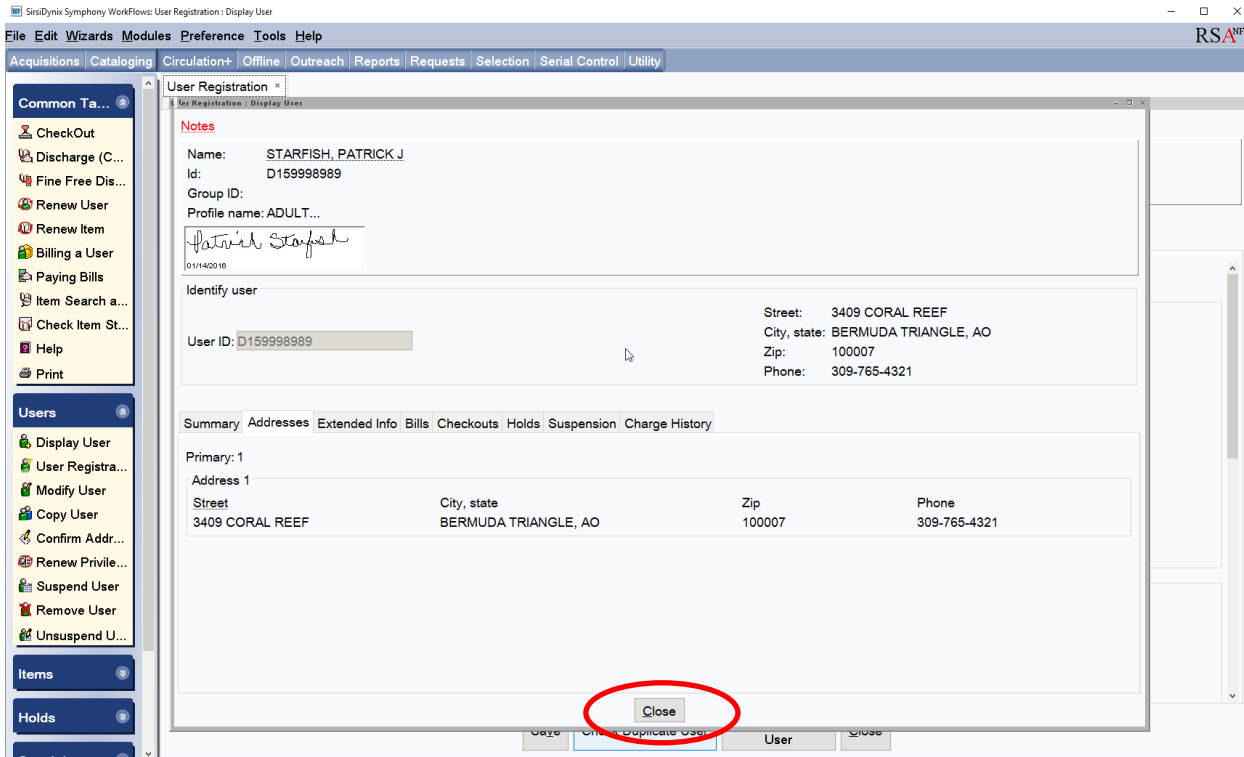
Cancel: will cancel the popup box and allow you to make changes to the current user registration account.

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



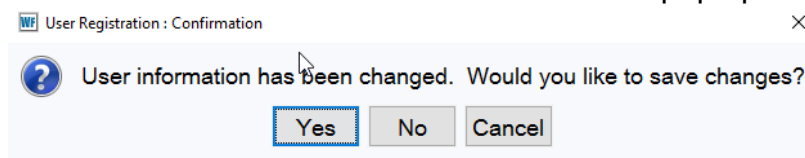
- a. Highlight the Name you would like to research.
- b. Click the User Search Helper in the upper left corner of the “UserRegistration: User Search” popup box.

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



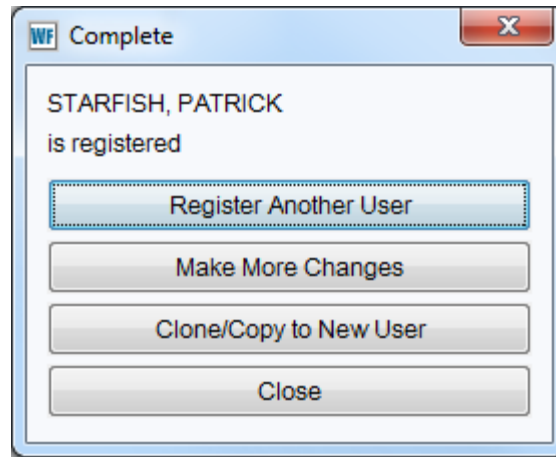
- d. On the “User Registration: Display User” pop up box:
- Review the user information on the Summary and Address tab.
 - i. If the information matches and the user account belongs to your:
 - a) Click the Close button at the bottom of the “User Registration: Display User” pop up box.
 - b) Click the Cancel button at the bottom of the “User Registrtrion: 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 does match and belongs to a public or 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 Registrtrion: 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: This button is used to retain address information if registering multiple users with the same address. (Do not use this option)

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

Questions??

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