

866-940-4083

User Search Helper

Revision Date: September 16, 2019

All wizards in WorkFlows contain a Helper Bar located across the top of each wizard. The helpers contained in each wizard provide easy access to information needed by the wizard currently opened. Most helpers are shared by multiple wizards.

These wizards contain the User Search Helper:

- > Checkout
- Renew User
- Billing a user
- Paying Bills
- Display User
- Modify User
- > Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Remove User
- Unsuspend User
- Mark Item Lost
- Place Hold Display User Holds
- Modify Holds for User
- Remove User Hold
- Place Research Holds
- User Claims Returned
- User Lost Card Modify Due Dates
- > Ephemeral

The User Search Helper is an icon with a magnifying glass and is located on the top left of each wizard in the circulation module that requires an entry of a User ID.



Properties:

Defaults are set per computer. Changes made to the User Search Helper properties will apply globally to User Search Helpers in other wizards. ****Changing the library default in the User Search Helper also changes the library in the Check Duplicate user function from ALL in the User Registration wizard.****

Default properties are configured by logging into WorkFlows using the supervisor login.

Logging into WorkFlows using the Supervisor login:

• Enter your WorkFlows library name followed by SUPER. The pin is also SUPER. Example:



Edit Wizards Modules Preference Tools Help	RSA
aloging Circulation+ Offline Outreach Reports Requests Reserves Selection Serial Control Utility	
ommon Tasks	
CheckOut Help	
Fine Properties	
Renew User	
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Billing a User	
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In the Circulation module:

- Right click the Checkout wizard in the Common Tasks toolbar.
- Select "Properties" from the drop down menu.

Display proper	ty page: 🔘 Wizard Startup 🔘 Never	
ehavior Default Helpers		
Configure		
Hide current user	Hide current item	
Extend user's library privilege	Pay bills	
Proxy checkout with cancel hold	Checkout reserve desk items	
Automatically restart checkout on item ID error	Display circulation note	
Cache Item ID's	Display an alert for the next to last renewal	
Enable 3M Enhanced Pad		-
Automatically renew items already checked out as see	en	
Automatically renew items already checked out as un	nseen	
Do not automatically renew items already checked o	ut	
Checkout all items associated with a set Yes Pro 	ompt	
User Alerts Display		
Display alert for delinquent user	ay user alerts	1
V Display user blocks in a separate window		
Sounds		
Play sound for User Delinquent alert	*	
	(*)	

Click the Helpers tab on the "CheckOut: Set Properties" popup box.

		Display property page: 🔘 Wizard Startup 💿 Never	
Behavio	r Defaults Helpers		
Allow	Configure Properties		
V	User Search		
	Display User		
7	User Lost Card		
1	Register New User		
V	Pay Bills		
1	Add Brief Title		
V	Item Search		
7	Confirm Address		
7	Change Item ID		
V	Special Due Date		
	Alternate Circ Rule		
1	Renew Privilege		
	Print User Card		
7	Print User		
S	tart with search helper		

Click the "User Search" button to access the defaults.

WF CheckOut : User Search:Set Properties	×
Behavior Defaults Helpers	
Display Birth Date	

Click the Defaults tab on the next User Search: Set Properties popup box.

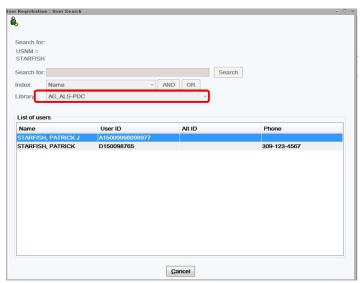
and the second se	Ilts Helpers	
Identify user de	efault	
Type:	Keyword Brows	e 🔘 Browse user group
Search index:	Name	· · · · · · · · · · · · · · · · · · ·
Library:	ALL_LIBS	
Sort by:	EMAIL	

Use the drop down menus to select defaults:

- Search: Select the index to search
- Library: Select library to limit search <u>SEE CAUTION ON NEXT PAGE</u>
- Sort by: List options to sort by. Applies to Keyword searching only

Click OK on the bottom of the Checkout: User Search: Set Properties popup box.

CAUTION:



Check Duplicate User result box/User Registration

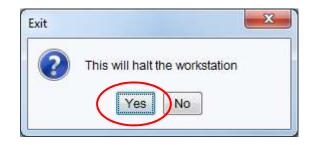
If you have selected a default library to limit user searches in the User Search helper, this affects the search library in the Check Duplicate user option in User registration. If you have selected a default search library then the Check Duplicate User in User Registration will check the default library <u>only</u> for duplicate users. It will <u>not</u> check the whole RSA patron database. Libraries who have selected a default library in the User Search helper will need to search the RSA patron database for previous user accounts <u>before</u> creating a new user account. Search the RSA patron database by using the User Search helper in the Display User wizard. Change the library selection to ALL before beginning the search.

Display propert	ly page: 🔘 Wizard Startup 💿 Never	
Behavior Defaults Helpers		
Configure		
Hide current user	Hide current item	
Z Extend user's library privilege	Pay bills	
Proxy checkout with cancel hold	Checkout reserve desk items	
Automatically restart checkout on item ID error	Display circulation note	
Cache Item ID's	Display an alert for the next to last renewal	
Enable 3M Enhanced Pad		
Automatically renew items already checked out as se	en	
Automatically renew items already checked out as un	iseen	
O not automatically renew items already checked out	ut	
Checkout all items associated with a set Yes Pro 	mpt	
User Alerts Display		
Display alert for delinquent user	ay user alerts	
Display user blocks in a separate window		
Sounds		
Play sound for User Delinquent alert	(*)	
Play sound for User Blocked alert ublock way	(*)	

Click OK on the bottom of the Checkout: User Search: Set Properties popup box.

You must close the Supervisor session of WorkFlows to save the User Helper configurations.

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



Click "Yes" to save the settings.

The User Search helper will contain the defaults the next time you log into WorkFlows using the CIRC, TECH or your individually assigned cataloger's login.

Don't forget to back up your Sirsi folder which will now contain the User Search helper configuration. Instructions for backing up your Sirsi folder can be found on the RSA web page.

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 can be used to:

- Transfer settings from one computer to another
- Load configured settings onto a new computer

Instructions on replacing the Sirsi folder or transferring the folder to another computer can be found 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> Clicking the User Search helper a "User Search" pop up box.

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ndex:	Name		AND OF	R Type:
ibrary: List of use	ALL_LIBS			Geven G
Name	27	User ID	Alt ID	Phone

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Name			R Type:
ry: ALL_LI	IS		Keyword Browse Browse user group
of users	User ID	Alt ID	Phone

To execute a keyword search for a user by name:

- Search for: Enter patron's name in any order
- Index: Contains "Name" or your selected default index
- *Library:* (Contains your selected default library)
 - ALL_LIBS: if searching for users from any RSA online member library
 - Your library WorkFlow's name: if searching for users from your library
- *Type:* Mark radio button in front of "Keyword"

Click "Search" button.

The Index drop down contains other searches:

ALT_ID	
BIRTHDATE	
COMMENT	
DAYPHONE	
EMAIL	
GROUP_ID	
HOMEPHONE	
ID	
LINE	
LINE1	
LINE2	
LINE3	
NAME	
NOTE	
PHONE	
PREV_ID	
PREV_ID2	
STAFF	
STREET	1
WORKPHONE	

If Home Phone, Phone, Work Phone or Address are selected the search result display will include all user accounts that contain the telephone number or address which was entered.

ATRICK				
earch for				Search
dex:	Name		✓ AND OR	<u> </u>
brary:	ALL_LIBS			
				Browse
				Browse user group
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Vame		User ID	Alt ID	Phone
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	H, PATRICK J	A15009998098976	,	

The search result will display any patron(s) found with the name entered in the "Name" box.

Clicking the "Display this User" button on the bottom of the screen will select the highlighted user back into the open WorkFlows wizard.

Search for:							
Name:							
STARFISH							
PATRICK							
Search for:	-				1	Search	
ndex:	Name			* AND	OR	Type:	
ibranc						Keyword	
Library: ALL_LIBS						Browse	
						Browse user group	
List of use							
			(
Name		User I	D	Alt ID		Phone	
STARCHE	R, JENNIFE	D3202	98634			309-883-5717	
STARFISH	, PATRICK	D1500	98765			309-123-4567	
STARFISH	, PATRICK J	A1500	9998098977				E
STARK (20	017), COLIN	D6610	18101	00173340)		
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Changing the Type to "Browse" will place the name alphabetically in a list of results. This can be helpful if you do not have the exact spelling of a name.

To execute a browse search for a user by name:

- Search for: Enter patron's name (Last name only or Last name then first name)
- o Index: Contains "Name"
- *Library:* (contains your selected default library)
 - ALL_LIBS: if searching for users from any RSA online member library
 - Your library Workflows name: if searching for users from your library
- Type: Mark radio button in front of "Browse"

Click the Search button.

Questions?? Contact the Help Desk at 866-940-4083 or rsahelp@railslibraries.info