

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.****

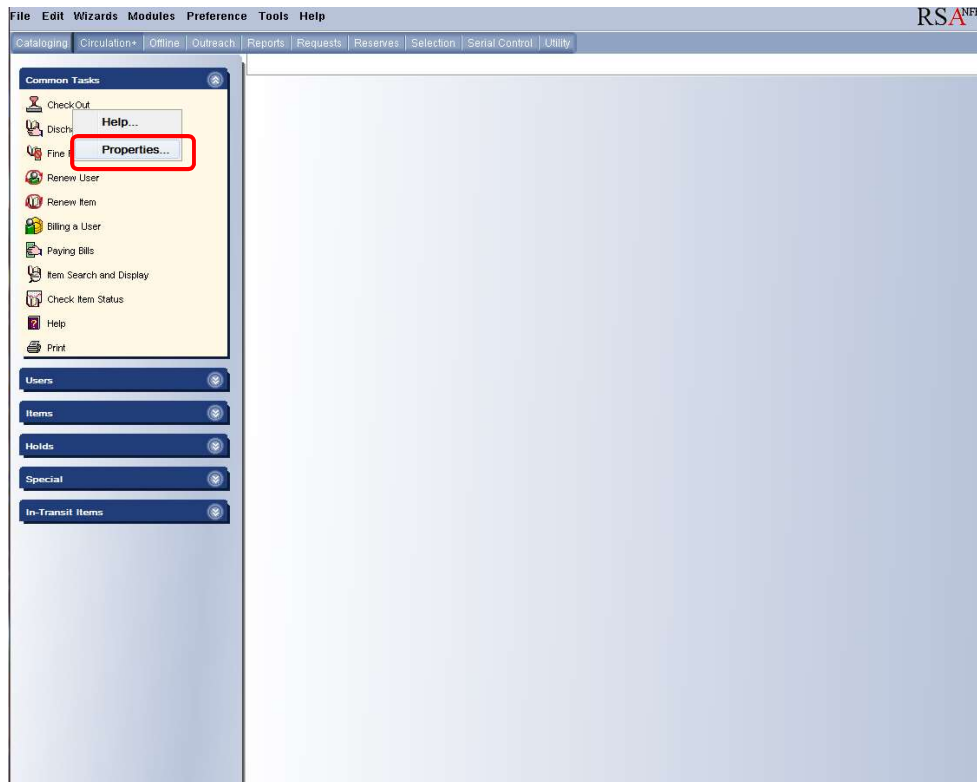
Default properties are configured by logging into WorkFlows using the supervisor login.

Logging into WorkFlows using the Supervisor login:

- Enter your WorkFlows library name followed by SUPER. The pin is also SUPER.

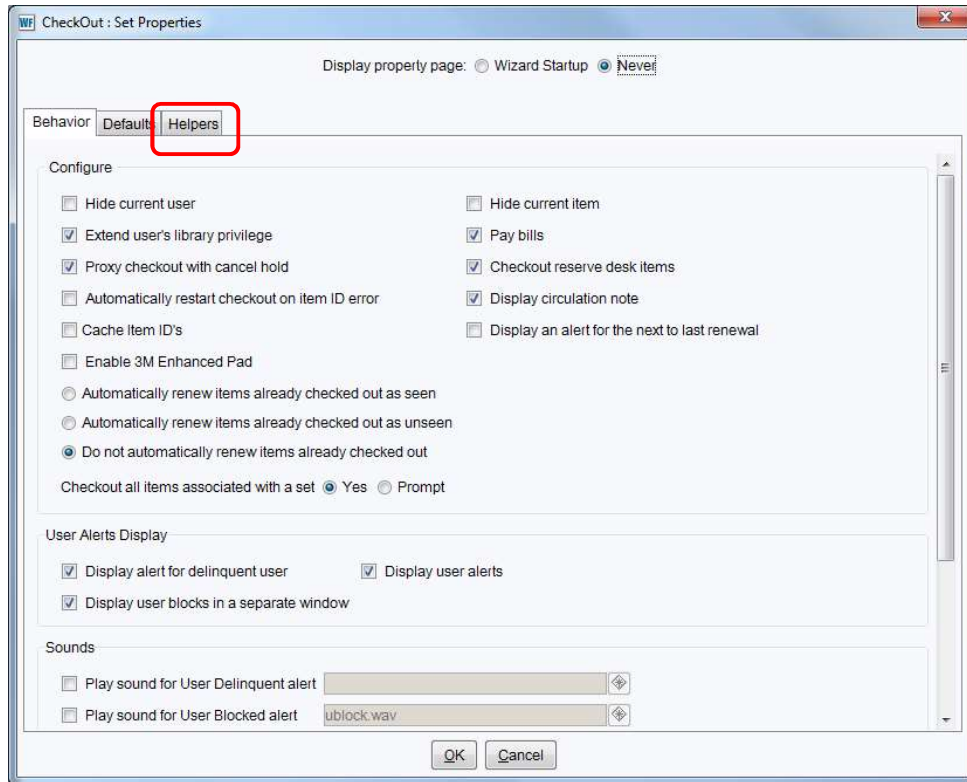
Example:



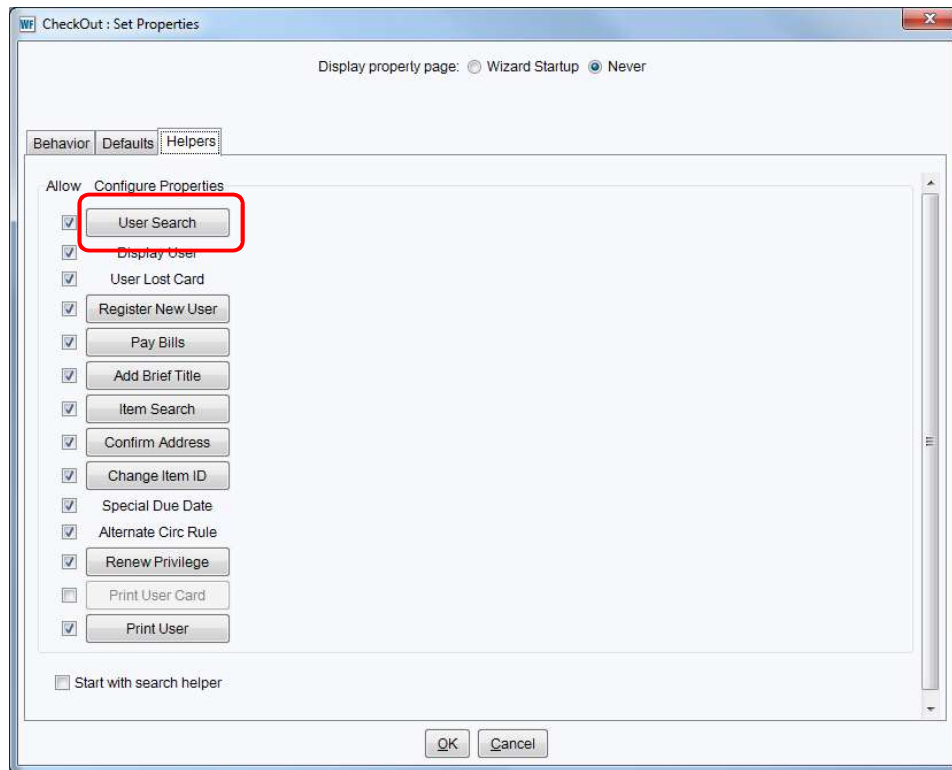


In the Circulation module:

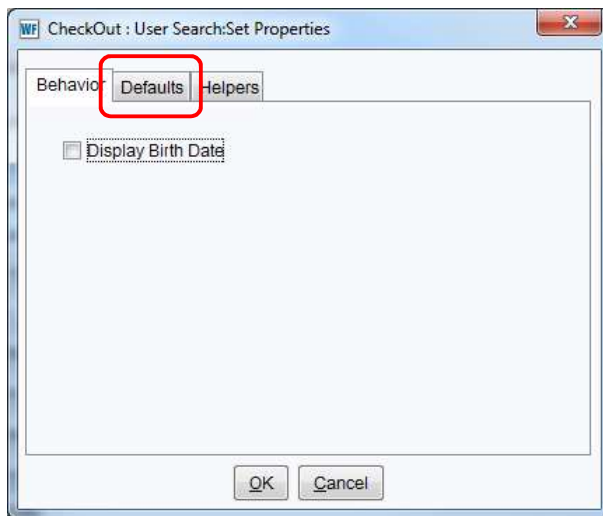
- Right click the Checkout wizard in the Common Tasks toolbar.
- Select “Properties” from the drop down menu.



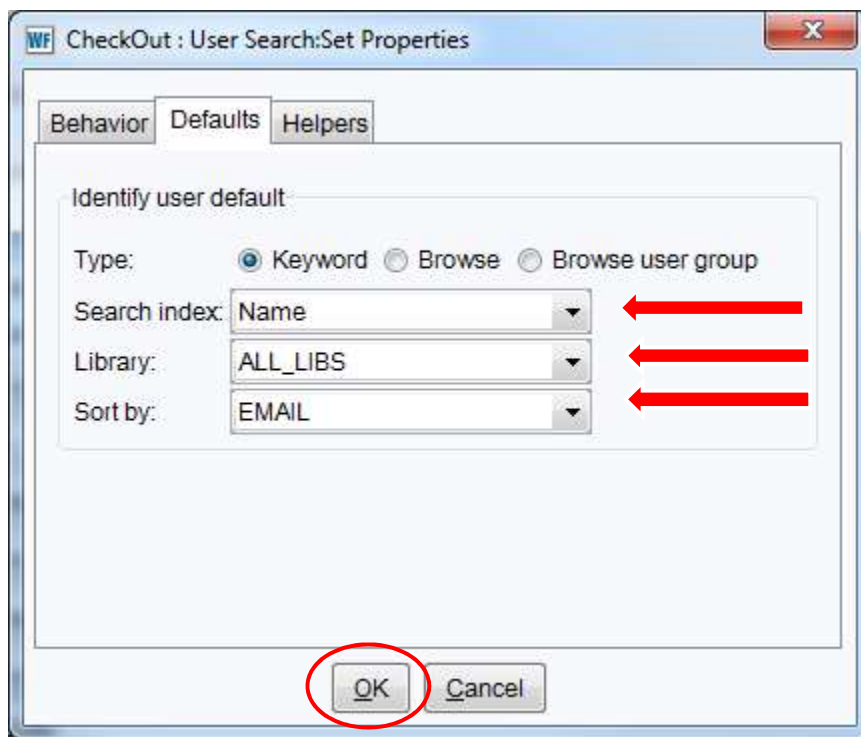
Click the Helpers tab on the “CheckOut: Set Properties” popup box.



Click the “User Search” button to access the defaults.



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

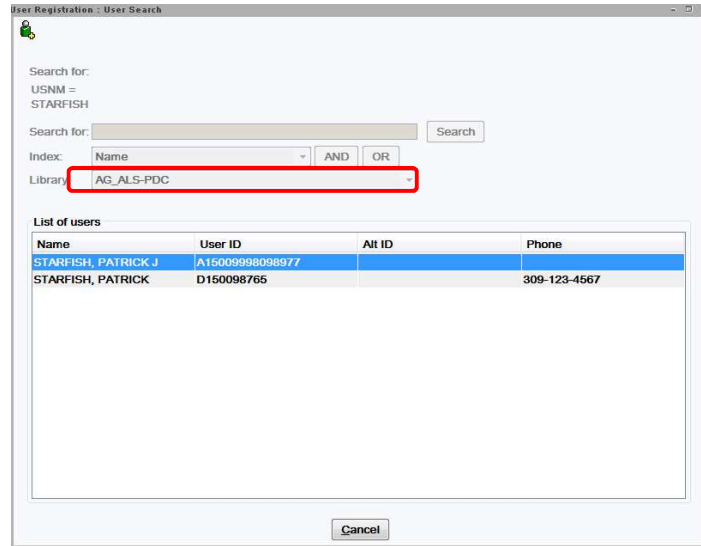


Use the drop down menus to select defaults:

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

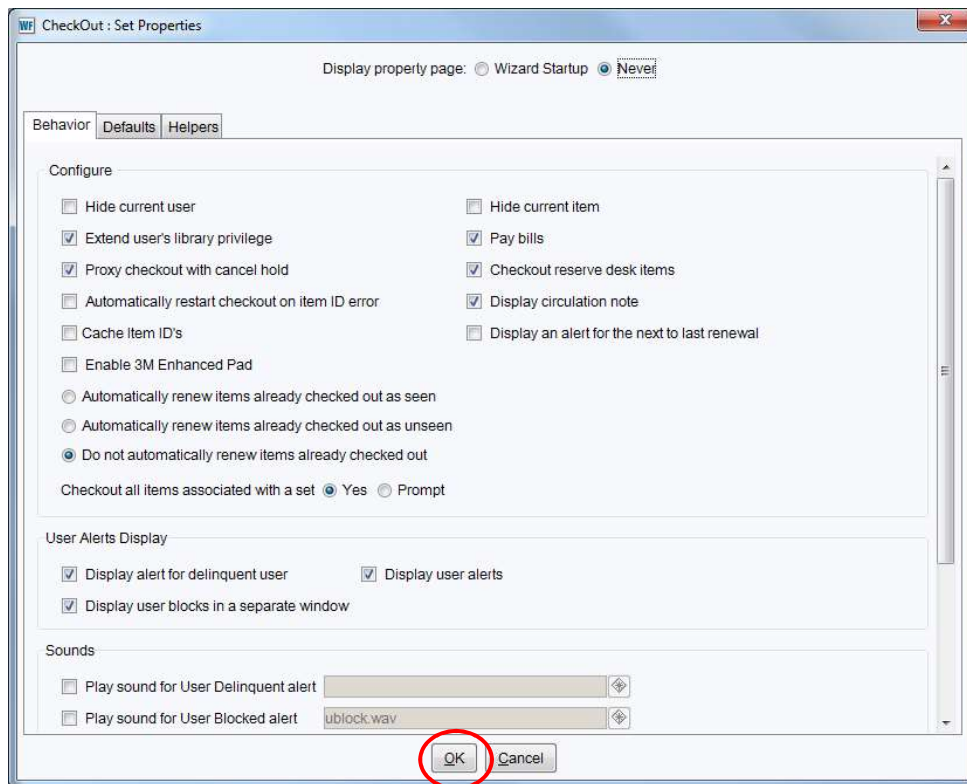
Click OK on the bottom of the Checkout: User Search: Set Properties popup box.

CAUTION:



Check Duplicate User result box/User Registration

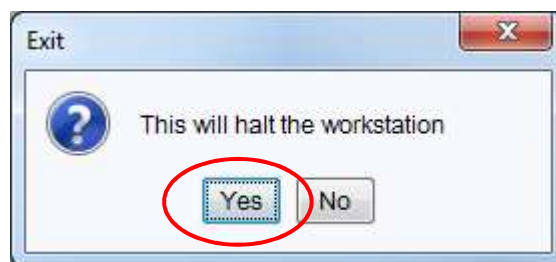
If you have selected a default library to limit user searches in the User Search helper, this affects the search library in the Check Duplicate user option in User registration. If you have selected a default search library then the Check Duplicate User in User Registration will check the default library only for duplicate users. It will not 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 before 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.



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:

<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 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.

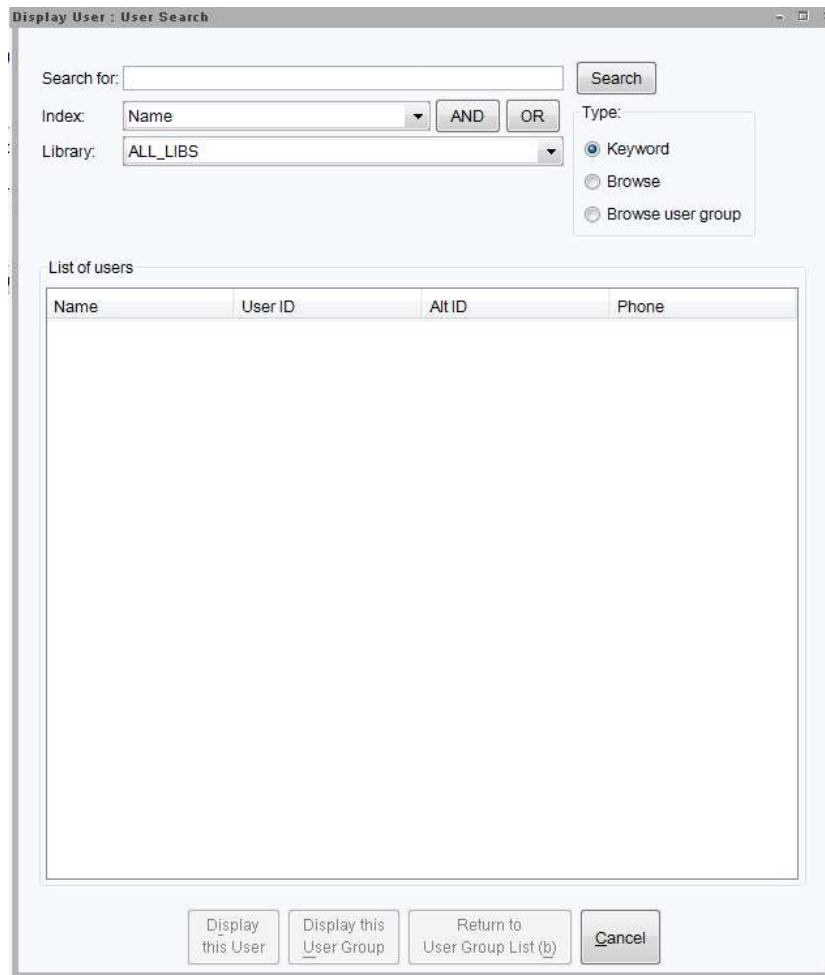
How to Replace the Workflows Configuration Folder on Windows 7:

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

How to Replace the Workflows Configuration Folder on Windows 10:

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

Clicking the User Search helper  opens a “User Search” pop up box.



Search for:

Search

Index: AND OR

Library:

Type:

- Keyword
- Browse
- Browse user group

List of users

Name	User ID	Alt ID	Phone
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Display this User Display this User Group Return to User Group List (b) Cancel

ectOut: User Search

Search for: STARFISH, PATRICK

Index: Name AND OR

Library: ALL_LIBS

Type:

- Keyword
- Browse
- Browse user group

List of users

Name	User ID	Alt ID	Phone

Checkout To User Display this User Group Return to User Group List Cancel

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
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.

Display User : User Search

Search for:
Name:
STARFISH,
PATRICK

Search for: Search

Index: Name AND OR

Library: ALL_LIBS

Type:
 Keyword
 Browse
 Browse user group

List of users

Name	User ID	Alt ID	Phone
STARFISH, PATRICK	A150098765		
STARFISH, PATRICK J	A15009998098976		

Display this User Display this User Group Return to User Group List (b) Cancel

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.

play User : User Search

Search for:
Name:
STARFISH
PATRICK

Search for:

Search

Index: AND OR

Library:

Type:
 Keyword
 Browse
 Browse user group

List of users

Name	User ID	Alt ID	Phone
STARFISH, PATRICK	D150098765		309-123-4567
STARFISH, PATRICK J	A15009998098977		
STARARCHER, JENNIFE...	D320298634		309-883-5717
STAR (2017), COLIN	D661018101	00173340	
STAR (2020), MADDI...	D661019149	00202760	
STAR, ANN L	D142751648		309-693-9035
STAR, ARLENE K	D031685266	IL 536201158866	309-275-9225
STAR, ASHLEY M	D143324850		309-681-9819
STAR, BARBARA JE...	D171269042		309-267-9047
STAR, BECKY L	D120543647		309-321-8036
STAR, BETH	D121626189		285-9728
STAR, BOBBY	D121606553		217-285-9728
STAR, BRIAN W (MR)	D372155264		309-318-1148
STAR, CARL R	D880450085		217-473-2604
STAR, CARLY A	D080771924		309-697-9814

Display this User Display this User Group Return to User Group List (h) Cancel

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)
- *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