



Resource Sharing Alliance  
715 Sabrina Drive  
East Peoria, IL 61611  
866-940-4083

## Clone/Copy User Helper Guide

Last updated September 3, 2024

There is a video to accompany this guide here:

<https://www.youtube.com/watch?v=AwRk0qpxQsl>.

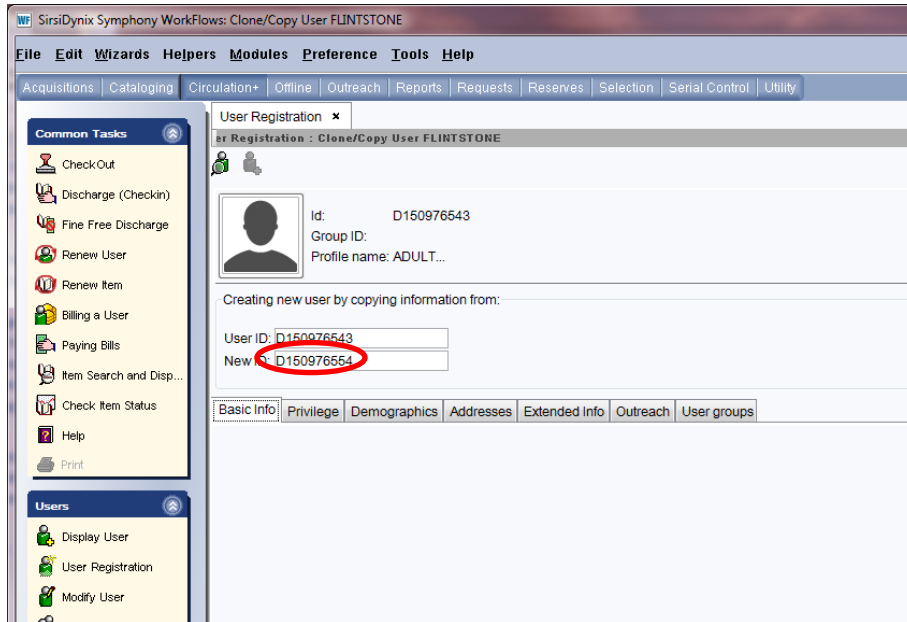
After adding a new user, if you select Clone/Copy to New User option on the Complete popup box you will see the User Registration: Clone/Copy User screen. The Clone/Copy to New User option allows staff to create a user account for additional family members without entering already recorded user information.

The User Registration: Clone/Copy User helper **does not** check for duplicate users. Before entering a new user in this helper check the user's information in the Display User wizard using the User Search helper:

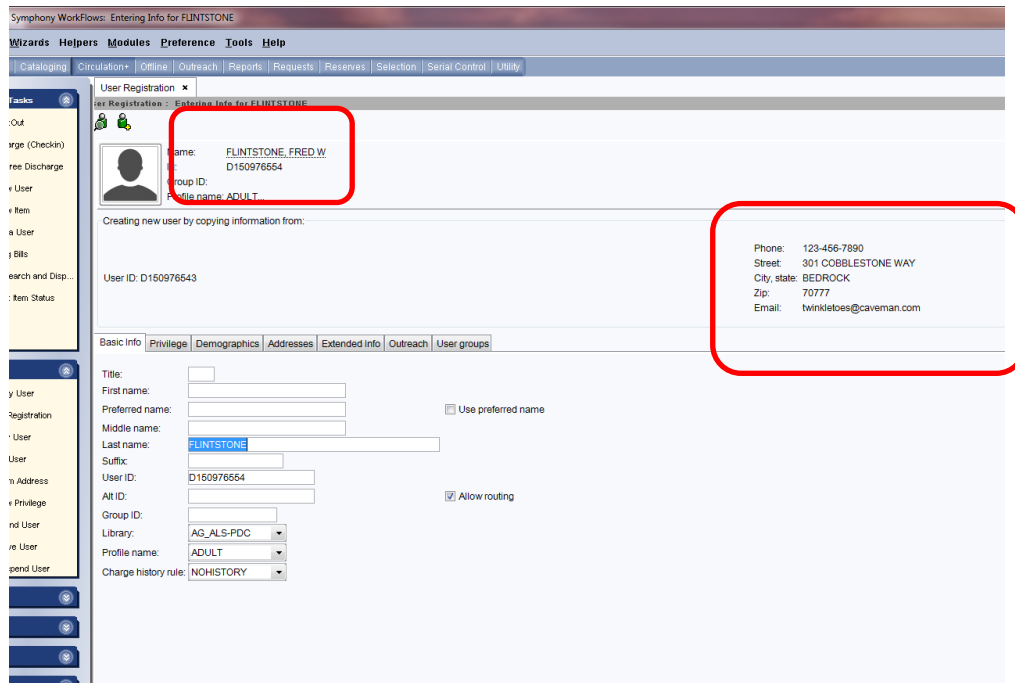
[https://support.librariesofrsa.org/project/users/#User\\_Search\\_Helper](https://support.librariesofrsa.org/project/users/#User_Search_Helper).

The screenshot shows the 'User Registration: Clone/Copy User FLINTSTONE' window. The window title is 'SirsiDynix Symphony WorkFlows: Clone/Copy User FLINTSTONE'. The menu bar includes 'File', 'Edit', 'Wizards', 'Helpers', 'Modules', 'Preference', 'Tools', and 'Help'. Below the menu bar is a navigation bar with tabs for 'Acquisitions', 'Cataloging', 'Circulation+', 'Offline', 'Outreach', 'Reports', 'Requests', 'Reserves', 'Selection', 'Serial Control', and 'Utility'. The 'Circulation+' tab is active. On the left side, there are two panels: 'Common Tasks' and 'Users'. The 'Common Tasks' panel lists various actions like 'Check Out', 'Discharge (Checkin)', 'Fine Free Discharge', 'Renew User', 'Renew Item', 'Billing a User', 'Paying Bills', 'Item Search and Display', 'Check Item Status', 'Help', and 'Print'. The 'Users' panel lists 'Display User', 'User Registration', 'Modify User', 'Copy User', 'Confirm Address', 'Renew Privilege', and 'Suspend User'. The main area of the window is titled 'User Registration: Clone/Copy User FLINTSTONE'. It shows a user profile with a silhouette icon, 'Id: D150976543', 'Group ID:', and 'Profile name: ADULT...'. Below this, it says 'Creating new user by copying information from:'. There are two input fields: 'User ID: D150976543' (circled in red) and 'New ID:'. At the bottom, there are tabs for 'Basic Info', 'Privilege', 'Demographics', 'Addresses', 'Extended Info', 'Outreach', and 'User groups'.

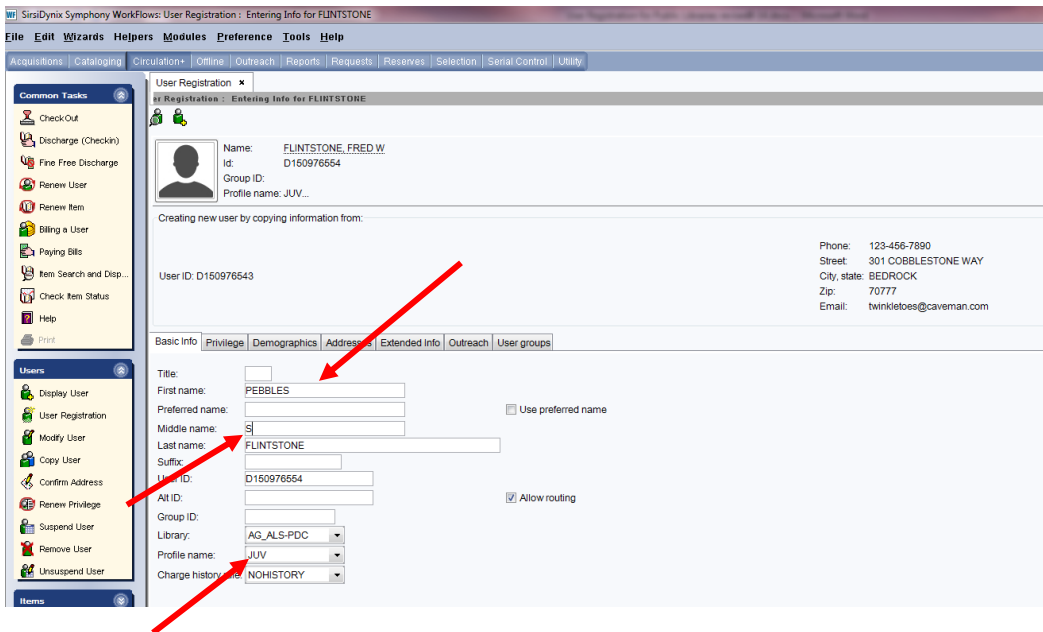
The User ID of the user whose information is being copied will display on the User Registration: Clone/Copy User screen.



1. Enter the User ID for the next family member in the New User ID box.



The information from existing user's account being copied displays on the top of the screen.



2. On the Basic Info tab enter the unique information for the next family member using the RSA Patron Registration Policy:

[https://support.librariesofrsa.org/project/users/#Patron\\_Registration](https://support.librariesofrsa.org/project/users/#Patron_Registration).

**First Name:** Enter the patron’s first name.

**Preferred name:** (Optional) Enter the patron’s preferred name.

**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 patron’s overdues and bills.

**Middle name:** Enter the patron’s middle name or middle initial.

**Last name:** The last name will be the same as the copied user. Delete the last name and enter a new last name if it is different.

**Alt ID:** Enter a unique alternate identification number for the patron. 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., a book club member. Reports may be run using the Group ID. To get accurate statistics you must be consistent when entering information in the Group ID box.


**Library:** Default library name from the Properties settings.

**Profile Name:** Using the drop-down menu select the appropriate user profile.

**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.

3. Patron Photo: The patron photo option is available by enabling the “Add Photo” property while logged into WorkFlows using the Supervisor log in. Please see Patron Photos in Workflows Cheat Sheet here [https://support.librariesofrsa.org/project/setup-config-backup/#Patron\\_Photos\\_in\\_WorkFlows](https://support.librariesofrsa.org/project/setup-config-backup/#Patron_Photos_in_WorkFlows) for information on adding patron photographs.

4. Open 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 patrons 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 a word (up to 10 digits) or the last 4 or 5 digits of the patron’s user ID. Open a ticket at [help@rsanfp.org](mailto:help@rsanfp.org) to create a library-wide default pin. Patrons need their pin 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

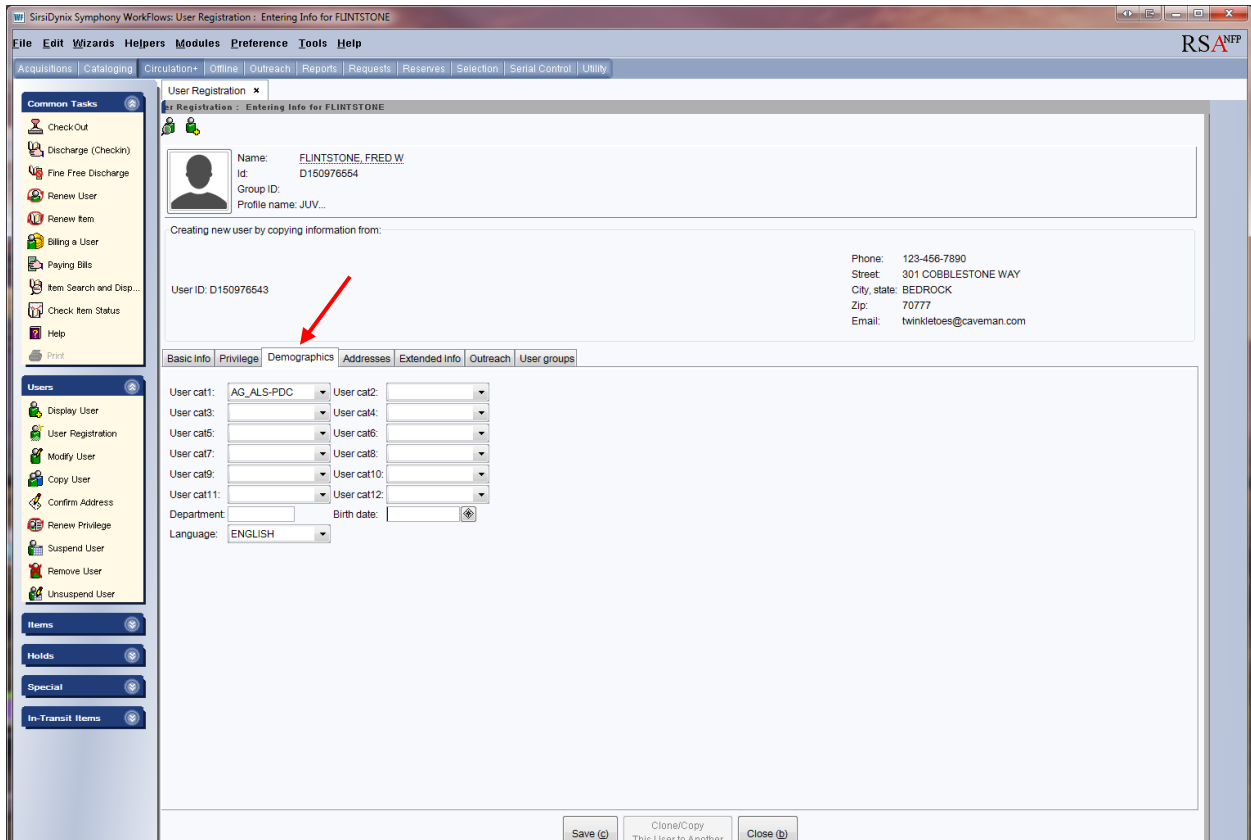
account is created, their pin can only be view by library staff using the Modify User Wizard in WorkFlows.

**Override:** If 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

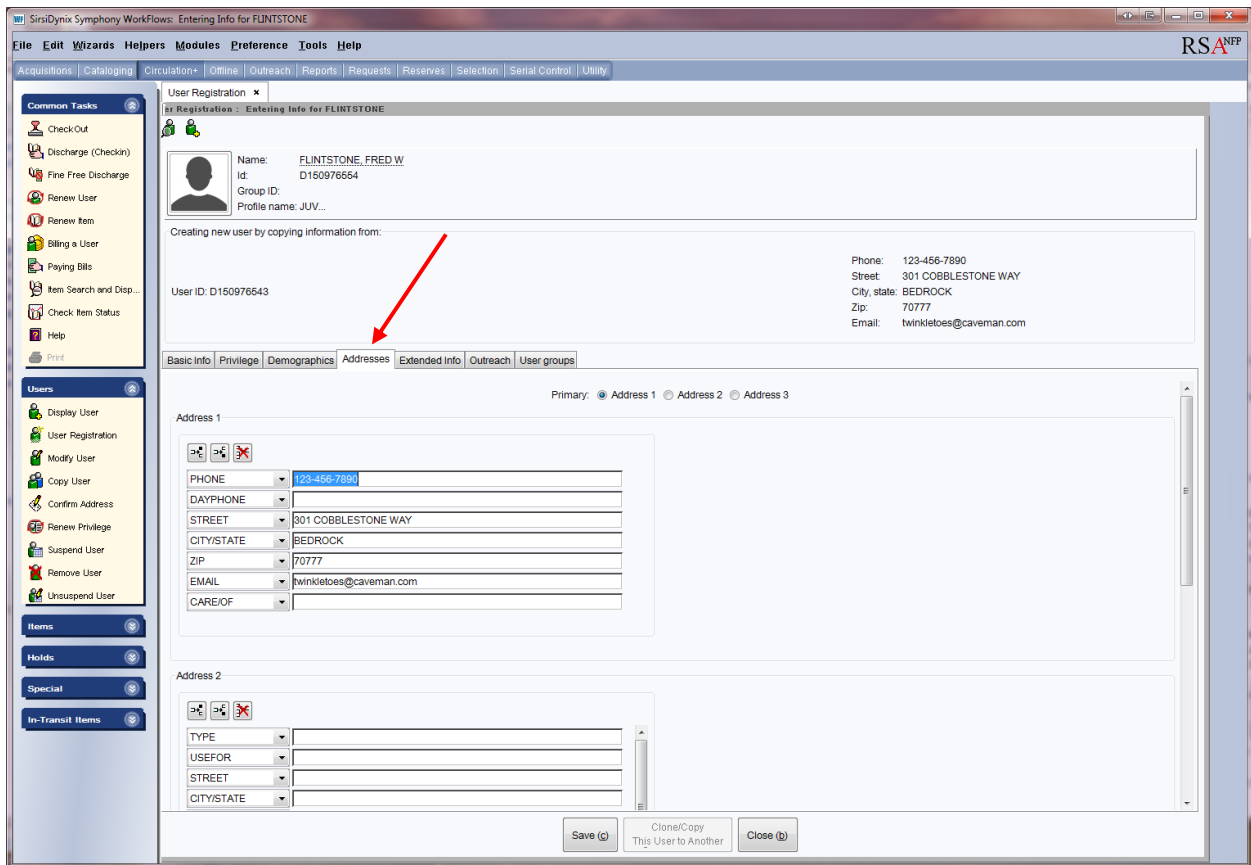
**BLUEcloud staff ID:** This box is blank.



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:** (Optional) Contains graduation years.

- **User cat 7:** Used by public libraries who have Intergovernmental agreements with local schools.
- **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.
- **User cats 8, 9, 10, 11, 12:** Blank
- **Birth date:** Enter the patron's birthday using this format; 8/26/2024 or using the gadget  at the end of the Birth date box.
- **Language:** The default is English



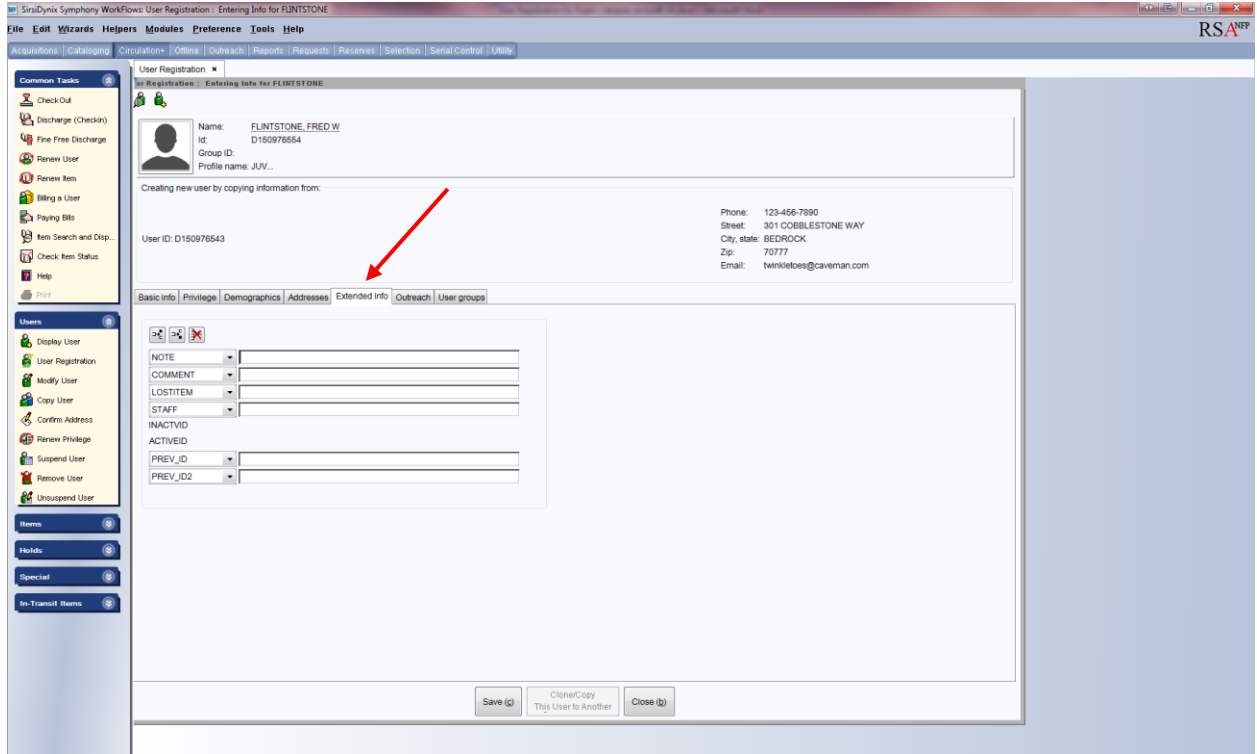
6. Open the Address tab. The boxes will be populated with information from the user copied.

Check the following information:

- **Phone:** Enter telephone number if it is different from the copied user.
- **Email:** Enter an email address if it is different from the copied user. If an email is entered in this box, user's bills and holds, overdue and courtesy notices 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*: The name of a parent or guardian can be entered here.

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

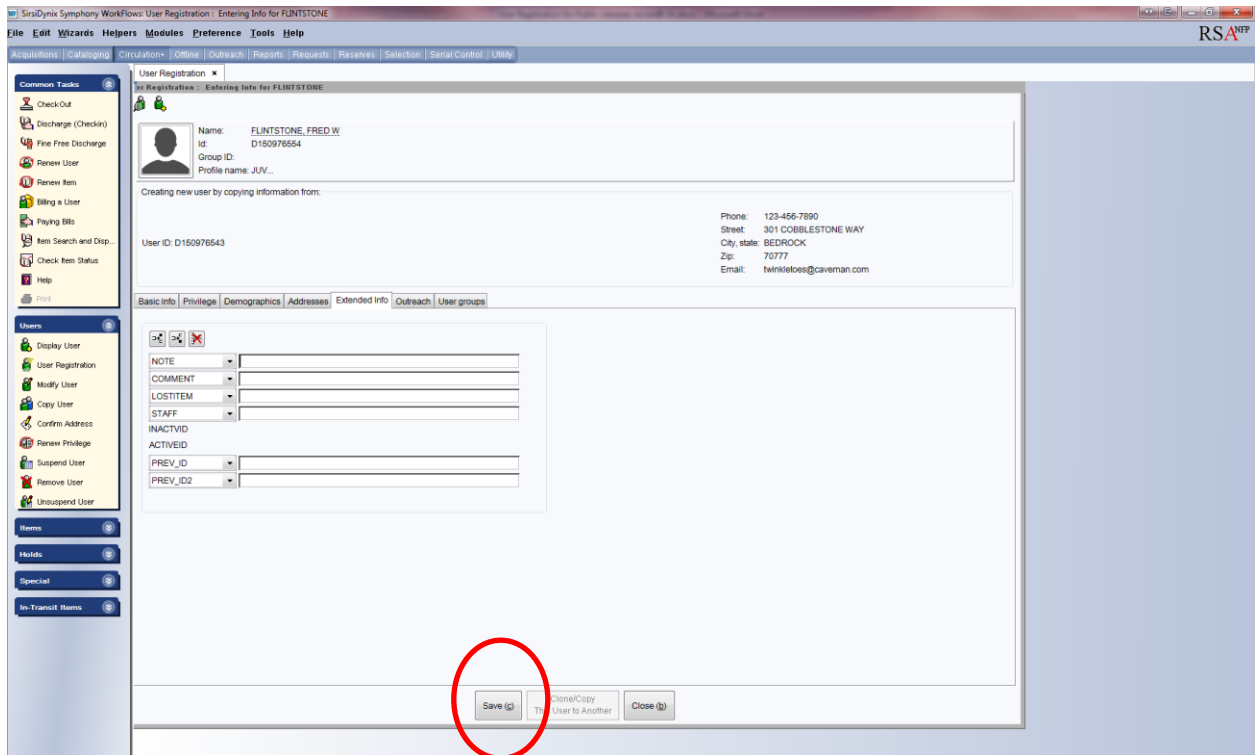


7. *Extended Tab*: (Optional) Extended tab information displays during circulation.

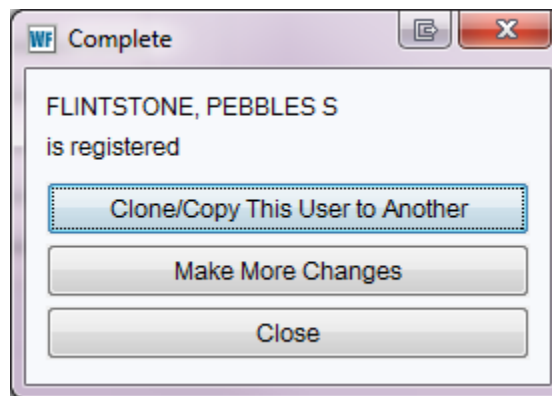
*Note-Comment-LostItem-Staff*: Enter notes that will appear when accessing the patron's account during circulation activities.

Follow the RSA Patron Notes Policy when entering notes:  
[https://support.librariesofrsa.org/project/users/#Patron\\_Notes](https://support.librariesofrsa.org/project/users/#Patron_Notes).

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



8. Click the Save button on the bottom of the screen.



9. The Complete box will appear with 3 options.

*Clone/Copy This user to Another:* Click this button to register another family member.

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

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

Contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or RSA staff at 866-940-4083.