User Registration for Public Libraries Guide

Last Updated: 16 September 2024

Patron Registration at RSA Member Libraries is governed by the following policies:
Patron Registration https://support.librariesofrsa.org/project/users/#Patron_Registration
Patron Cards: https://support.librariesofrsa.org/project/users/#Patron_Cards

There is a video to accompany this guide here:
https://www.youtube.com/watch?v=Oc8cEOTba2U

Setting Properties:
Properties will need to be set once on each computer.

Log into Workflows using the CIRC user.
In the Circulation Module, right click on the User Registration Wizard.
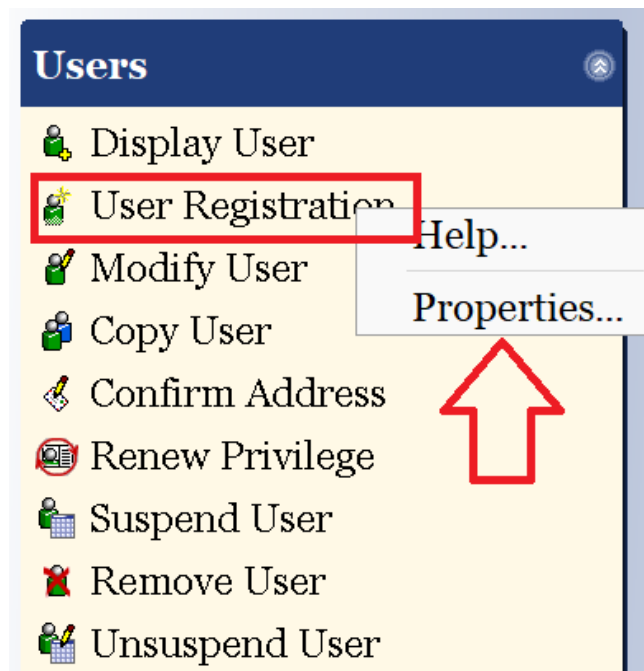
Click on Properties... and select the Defaults Tab.

Check the following:
Library: Your library code
Profile Name: Most commonly used profile
Uncheck Track charges as Favorites
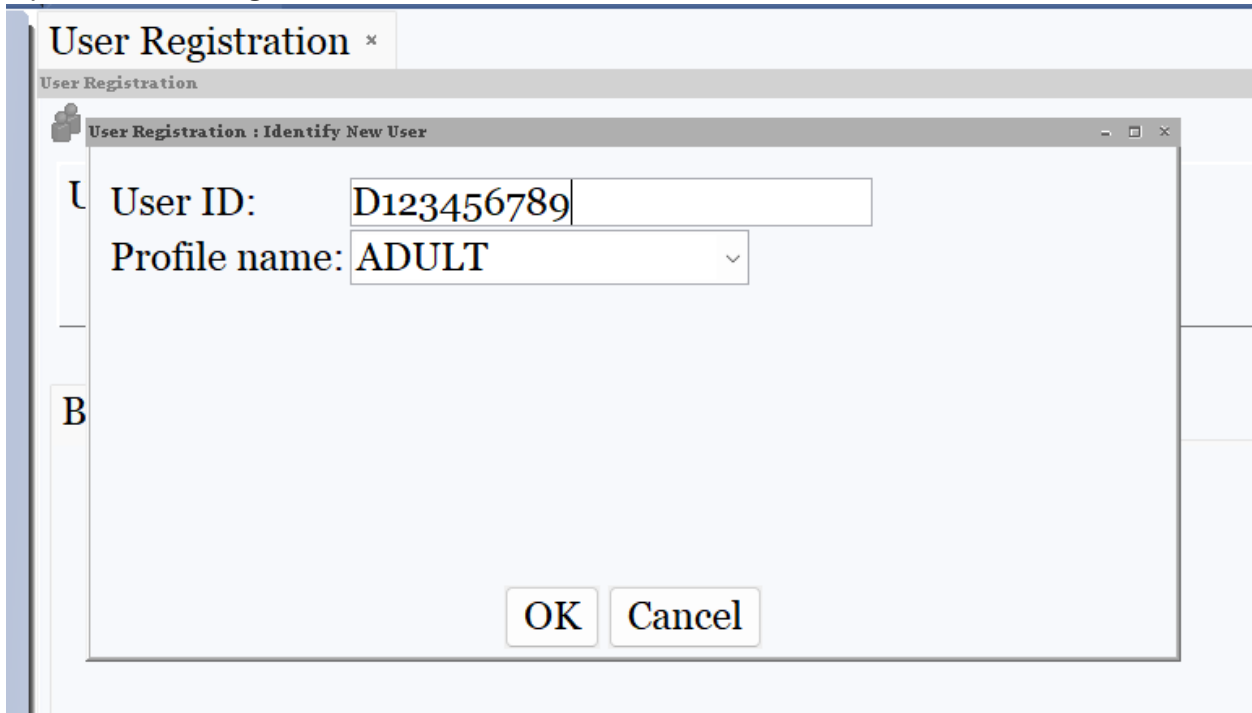
UserCat1: Your library code

Remember to back up your Sirsi folder that now contains the updated user registration configuration default properties. Instructions for backing up and replacing your Sirsi folder are available here: https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore.

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

Registering Patrons:

Open the User Registration.

Scan the library card number for that you are using for that specific patron into the User ID box. Traditional profiles are ADULT, JUV & YA.
For additional information on commonly used profiles, see the following documents:

- [Most Commonly Used Profiles Guide](#)
- [When do I use these profiles? A Guide](#)

In the Basic Info tab, the following information is REQUIRED:
First Name
Middle Initial (if applicable)
Last Name

Make sure Library name is your library
Make sure the correct User Profile has been selected
THESE NEED TO BE IN ALL CAPS

Basic Info	Privilege	Demographics	Addresses	Extended Info

Title:
First name:
Preferred name:
Middle name:
Last name: **NAME-NOT-YET-SUPPLIED**
Suffix:
Alt ID:
Group ID:
Library: RANSOM-MEM
Profile name: ADULT
Charge history rule: NOHISTORY

In the Privilege tab, the following information is REQUIRED:

Privilege expires: this will default to the date attached to the user profile. Generally, this is 3 years. It can be changed via the widget or typing in a date. Date must be in M/D/YYYY format.

PIN: This is an autogenerated number. Any number/letter combo between 4-8 characters will work. Patrons will need this number to access digital materials.

(If you would like to set a default pin for all patrons, please email the Help Desk at help@rsanfp.org. Examples are the library name, the last four of the library cards, etc.)

When you change any of this information, you will need to put in the Override code which is RSA.

Basic Info	Privilege	Demographics	Addresses	Extended Info

Privilege expires: 9/16/2027
PIN: ****   Override:
Status: OK
Claims returned: Override:
Web auth id: Override:
BLUEcloud staff ID: Override:

In the Demographics Tab, you will need to check the User Cat1 to make sure your library is listed.

Birth date: Enter the patron's birthday using this format; 6/15/2015 or using the gadget at the end of the Birth date box. ***Entering a birthdate is not optional. It is required.***

| Basic Info | Privilege | Demographics | Addresses | Extended Info |

User cat1:	RANSOM-MEM	User cat2:	
User cat3:		User cat4:	
User cat5:		User cat6:	
User cat7:		User cat8:	
User cat9:		User cat10:	
User cat11:		User cat12:	
Department:		Birth date:	DD/MM/YYYY
Language:	ENGLISH		

The rest of the User Cats are optional:
- *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 may 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

These will not change as the patron ages or changes; they will have to be updated manually.

In the <u>Addresses Tab</u>, the following information is required:

Patron phones and email addresses are highly recommended.
For underaged patrons, it is recommended that the name of the responsible parent/guardian be entered in the Care/Of field.

Please follow the Patron Registration Policy when entering this information.

Once all the correct required information has been entered, click Check Duplicate User. This will make sure that student does not have an existing card in the system.

You will get a pop-up box that tells you there are no duplicate users:
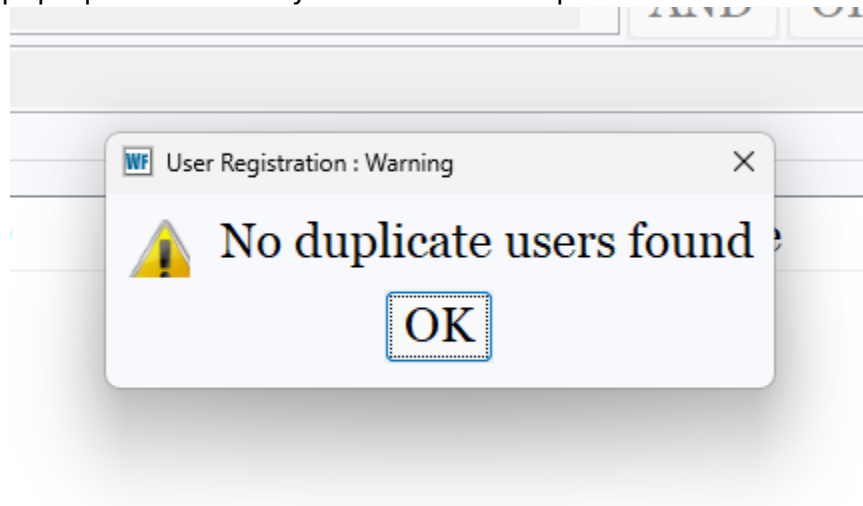
If there is another account in the system with that same name, the new account will pop up for verification. Please make sure you are not creating a duplicate account. If that account belongs to your library, it needs to be modified, instead of issuing a new card. If that account belongs to a different library, please follow the Reciprocal Patron Deletion Procedure.

Once that account has been verified, hit Save.

If you get this pop-up box, the patron has been successfully registered:
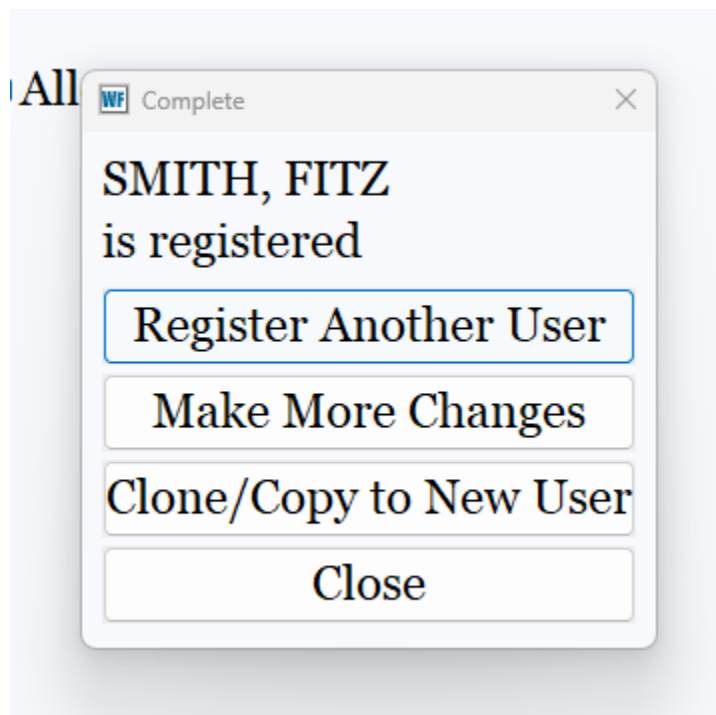
For additional information or if you have questions, please contact the RSA help desk at help@rsanfp.org or at 866-940-4083.