

## User Registration For School Libraries Guide

**Last Updated: September 9, 2024**

There is a video to accompany this guide here:  
<https://www.youtube.com/watch?v=EJoML4XqN84>.

### **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: Set to your library/branch location

Profile Name: Set to STUDENT

User Cat1: Set to your library/branch location

Click OK. Close out your Workflows. It will tell you properties have been changed. Select Yes. When you reopen Workflows, the settings will be in place.

User Registration : Set Properties

Display property page:  Wizard Startup  Never

Behavior **Defaults** Helpers

Library: AG\_ALS-PDC Profile name: ADULT

Charge history rule: NOHISTORY

Track charges as Favorites

Focus on:  First name  Last name

Addresses

Primary address flag:  Address 1  Address 2  Address 3

Demographics

User cat1: 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:

Language: ENGLISH

Outreach

Route ID:

Total items limit: 10

Usergroup Membership Tab

Responsibility policy:

OK Cancel

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](https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore).

The backed up Sirsi folder is used to:

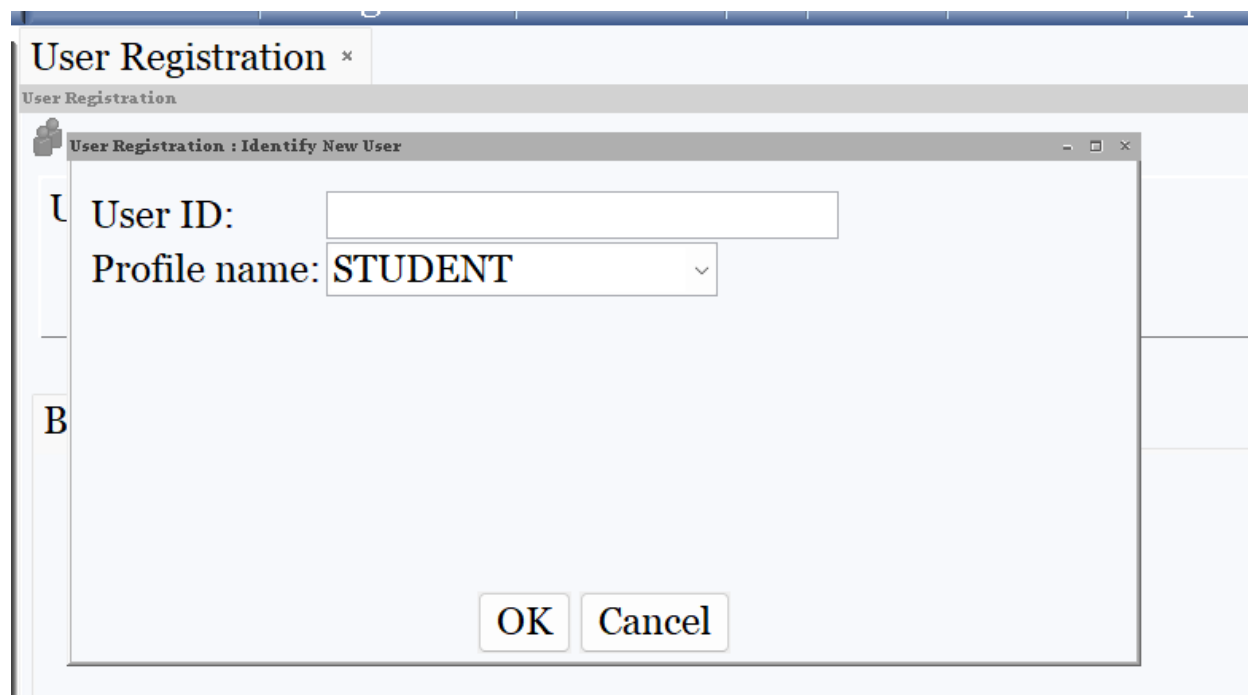
- Transfer settings from one computer to another
- Load configured settings onto a new computer
- Replace settings on a computer that has crashed

Before registering a new patron, review the following documents:

- [Patron Registration Policy](#)
- [Patron Card Policy](#)
- [Reciprocal Patron Deletion Form and Procedure](#)

## **Registering Students**

Open the User Registration Wizard.



The screenshot shows a window titled "User Registration" with a sub-dialog box titled "User Registration : Identify New User". The sub-dialog box contains two input fields: "User ID:" with an empty text box, and "Profile name:" with a dropdown menu showing "STUDENT". At the bottom of the sub-dialog box are "OK" and "Cancel" buttons. On the left side of the main window, there are tabs labeled "U" and "B".

Scan the library card number for that you are using for that specific student into the User ID box. If this is a teacher/faculty member, change the Profile Name to S-Staff or FACULTY, whichever you prefer.

In the Basic Info tab, you will need to fill out:

First Name


Last Name

Alt ID or Group ID: these are optional

Make sure Library name is your library

Make sure the correct User Profile has been selected

THESE NEED TO BE IN ALL CAPS

 Id: 133242  
Group ID:  
Profile name: STUDENT...

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



Title:   
First name:   
Preferred name:   Use preferred name  
Middle name:   
Last name:   
Suffix:   
Alt ID:   Allow routing  
Group ID:   
Library:   
Profile name:   
Charge history rule:

In the Privilege Tab, you will need to update the expiration date of the library card. You can type that in or use the gadget at the end of the box to pull up a calendar. The default expiration date for a STUDENT profile is 4 years. The default expiration date for FACULTY is 3 years.

You can also set a PIN number for your student. Any number/letter combo between 4-8 characters will work. They will need this number to access digital materials. (If you would like to set a default pin for all students, please email the Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org). Examples are a mascot, the last four numbers of the library card, school initials, 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:    
PIN:  Override:   
Status:   
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.

Optionally, you can put the student's graduation year in User Cat6.

Basic Info **Demographics** Addresses Extended Info

|             |                      |             |                      |
|-------------|----------------------|-------------|----------------------|
| User cat1:  | <input type="text"/> | User cat2:  | <input type="text"/> |
| User cat3:  | <input type="text"/> | User cat4:  | <input type="text"/> |
| User cat5:  | <input type="text"/> | User cat6:  | <input type="text"/> |
| User cat7:  | <input type="text"/> | User cat8:  | <input type="text"/> |
| User cat9:  | <input type="text"/> | User cat10: | <input type="text"/> |
| User cat11: | <input type="text"/> | User cat12: | <input type="text"/> |
| Department: | <input type="text"/> | Birth date: | <input type="text"/> |
| Language:   | ENGLISH              |             |                      |

If all your students are supplied with school emails, that email address can be entered in the Addresses Tab.

Basic Info Privilege **Demographics** Addresses Extended Info

Primary:  Address 1  Address 2  Address 3

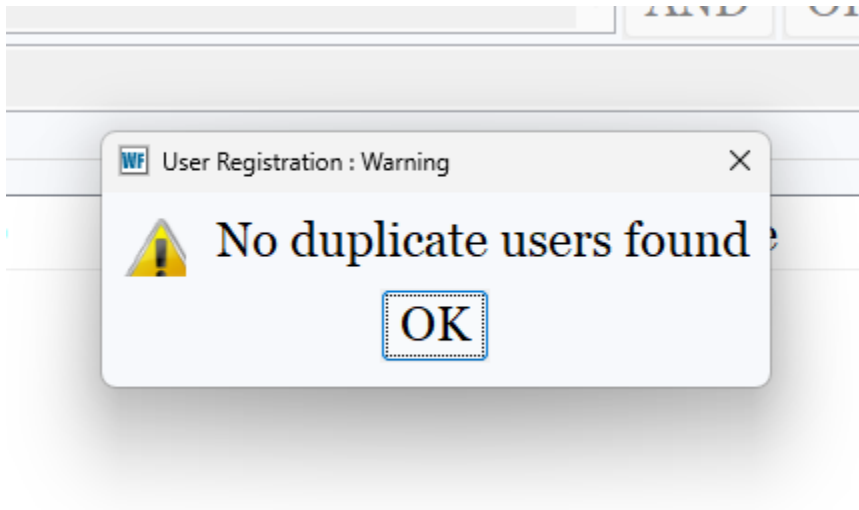
Address 1

|            |                      |
|------------|----------------------|
| PHONE      | <input type="text"/> |
| DAYPHONE   | <input type="text"/> |
| STREET     | <input type="text"/> |
| CITY/STATE | <input type="text"/> |
| ZIP        | <input type="text"/> |
| EMAIL      | <input type="text"/> |
| CARE/OF    | <input type="text"/> |

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.

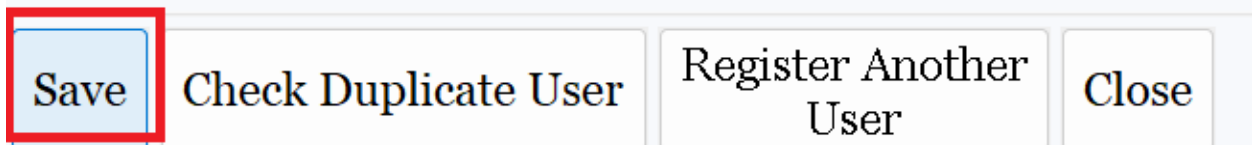


You will get a pop-up box that tells you there are no duplicate users:

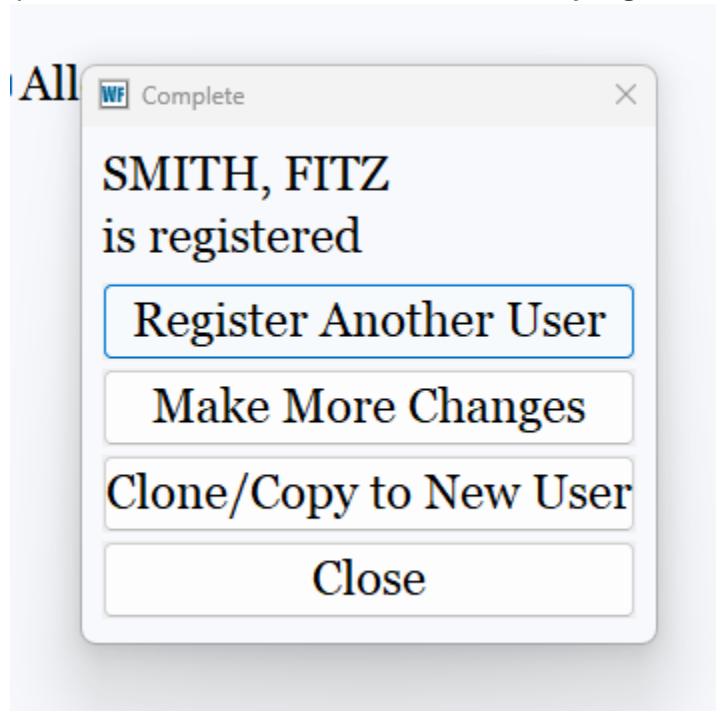


If there is another account in the system with that same name, the new account will pop up for verification. If that account belongs to a Public Library, you can ignore it. If that account belongs to your school library, it needs to be modified, instead of issuing a new card.

Once that account has been verified, hit Save.



If you get this pop-up box, that student has been successfully registered:



For additional information or if you have questions, please contact the RSA help desk at [help@rsanfp.org](mailto:help@rsanfp.org) or at 866-940-4083.