



Resource Sharing Alliance
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User Search Helper Guide

Last updated: September 6, 2024

There is a video to accompany this guide here:

<https://www.youtube.com/watch?v=xl8wiXXGD7c>.

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. Multiple wizards share most helpers.

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.



Default 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.

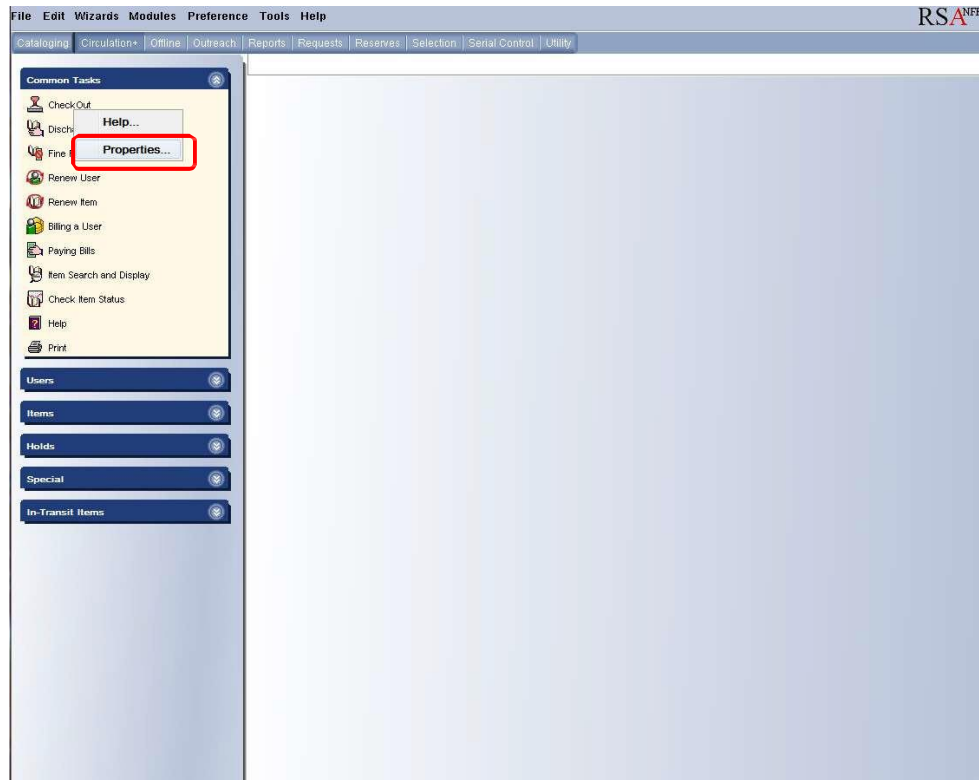
Default properties are configured by logging into WorkFlows using the supervisor login. Logging into WorkFlows using the Supervisor login:

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



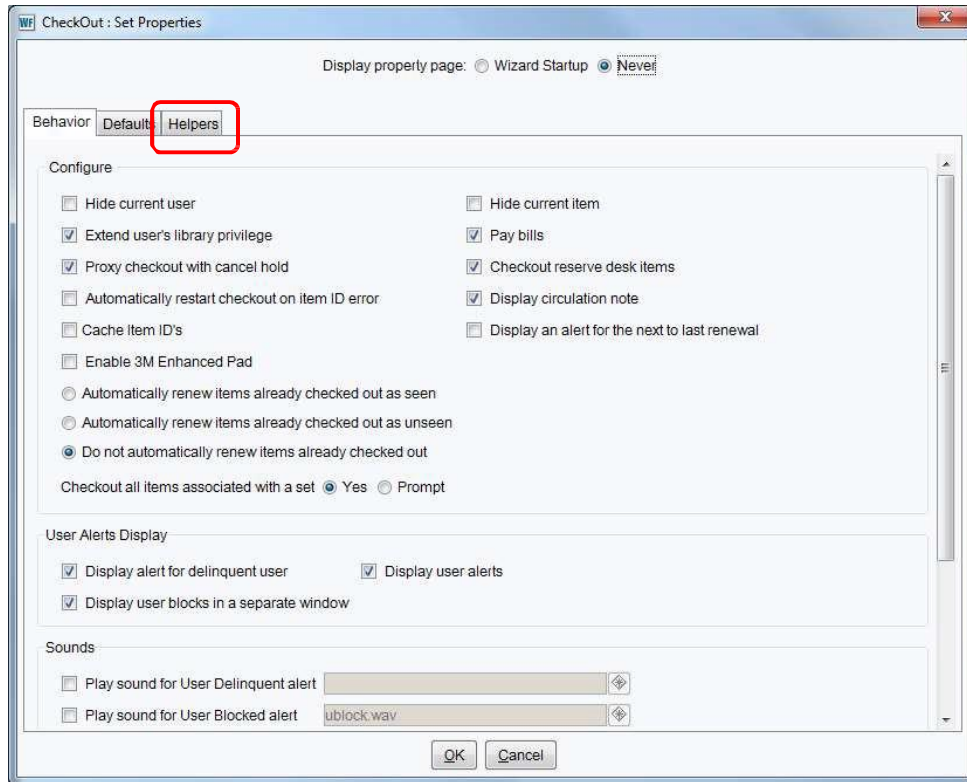
In the Circulation module:

- Right click the Checkout wizard in the Common Tasks toolbar.

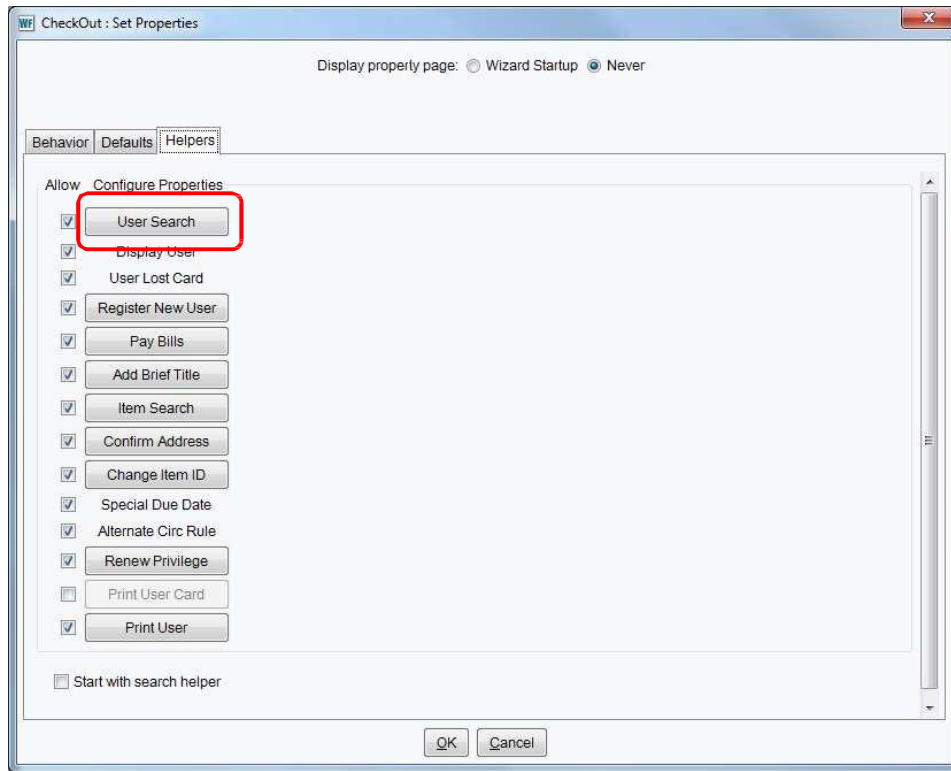


- Select “Properties” from the drop-down menu.

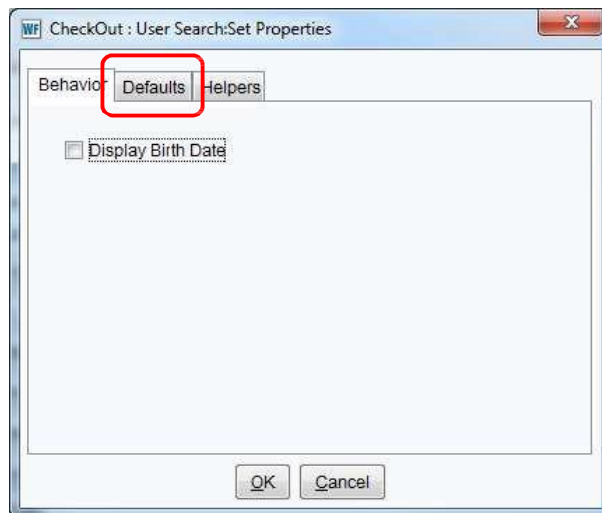
Click the Helpers tab on the “CheckOut: Set Properties” popup box.



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



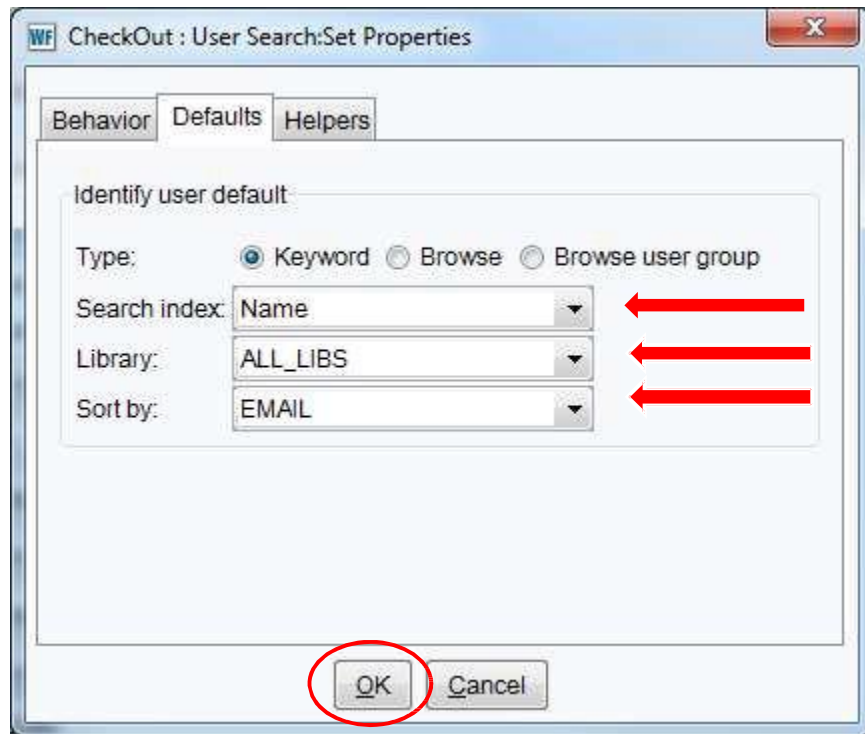
Click the Defaults tab on the next User Search: Set Properties popup box.



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**

Search for:
USNM =
STARFISH

Search for: Search

Index: Name AND OR

Library: AG_ALS-PDC

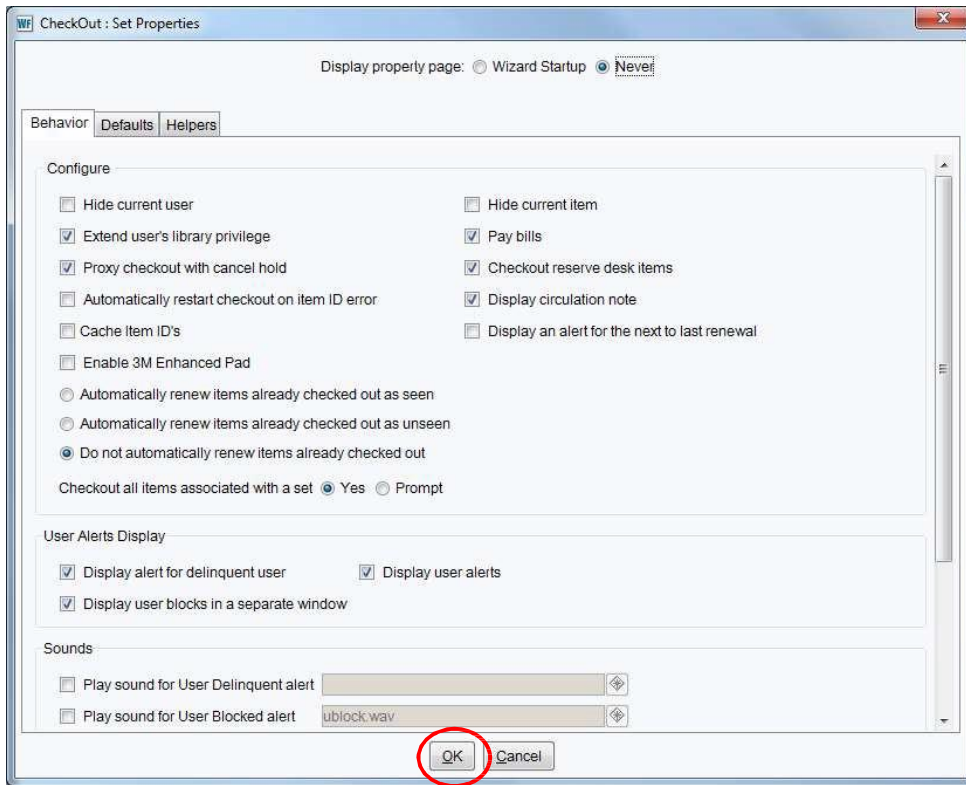
List of users

Name	User ID	Alt ID	Phone
STARFISH, PATRICK J	A15009988098977		
STARFISH, PATRICK	D150098765		309-123-4567

Cancel

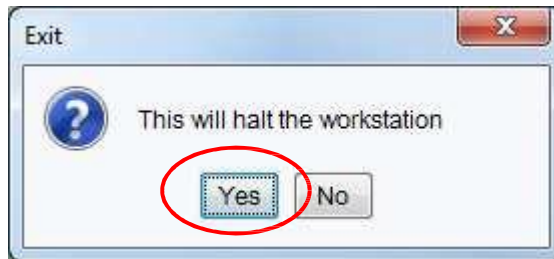
If you have selected a default library to limit user searches in the User Search helper, this affects the search library in the Check Duplicate user option in User registration. If you have selected a default search library, then the Check Duplicate User in User Registration will check the default library 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.



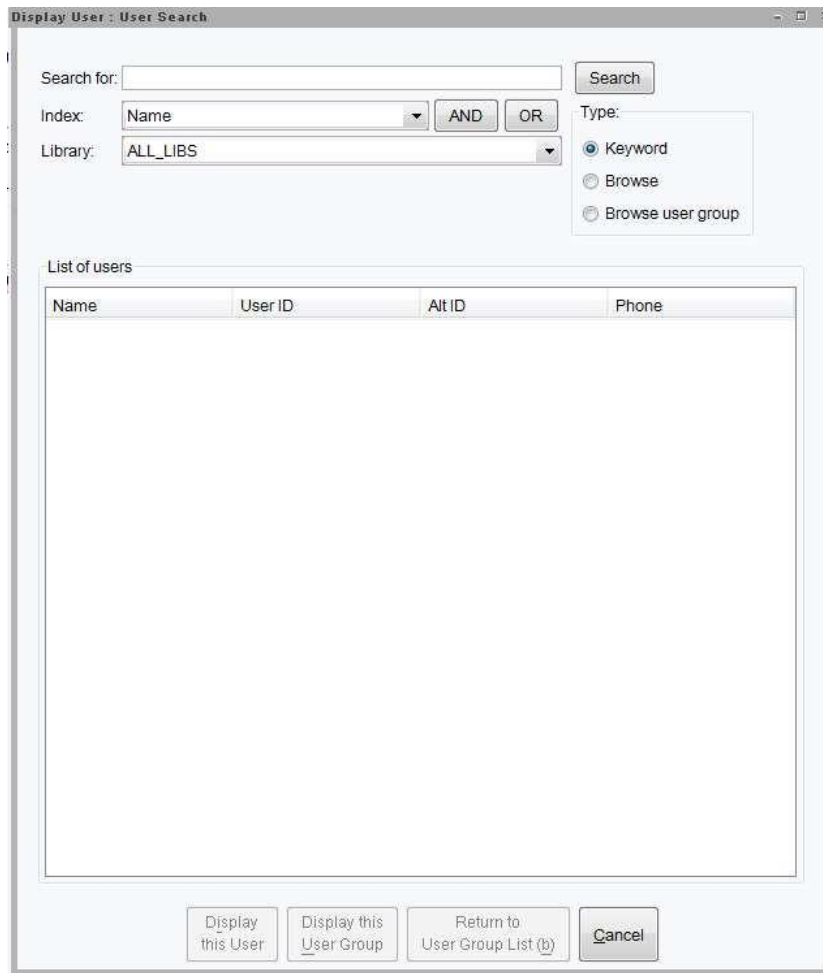
The User Search helper will contain the defaults the next time you log into WorkFlows using the CIRC, TECH or your individually assigned cataloger's login.

Don't forget to back up your Sirsi folder which will now contain the User Search helper configuration. Instructions for backing up and replacing your Sirsi folder can be found on the RSA web page here: https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore.

The backed up Sirsi folder can be used to:

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

Clicking the User Search helper  opens a "User Search" pop up box.



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

Search for: STARFISH, PATRICK

Index: Name AND OR

Library: ALL_LIBS

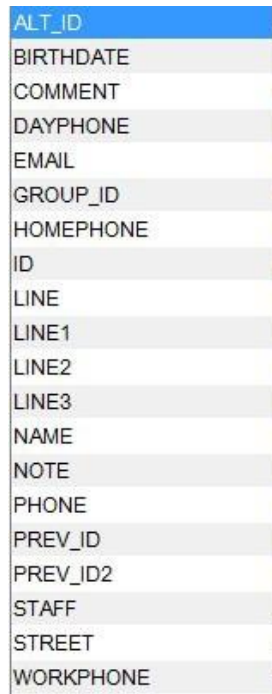
Type: Keyword Browse Browse user group

List of users

Name	User ID	Alt ID	Phone
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Checkout To User Display this User Group Return to User Group List Cancel

The Index drop down contains other searches:



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.

Search for:
Name:
STARFISH,
PATRICK

Search for: Search

Index: Name AND OR Type:
 Keyword
 Browse
 Browse user group

Library: ALL_LIBS

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.

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.

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

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