User Registration in BLUEcloud Circulation Guide

Last updated: September 16, 2025

Before you begin, make sure you have checked out the *Getting Started in BLUEcloud Circulation* Cheat Sheet:
https://support.librariesofrsa.org/project/bluecloud-circulation/
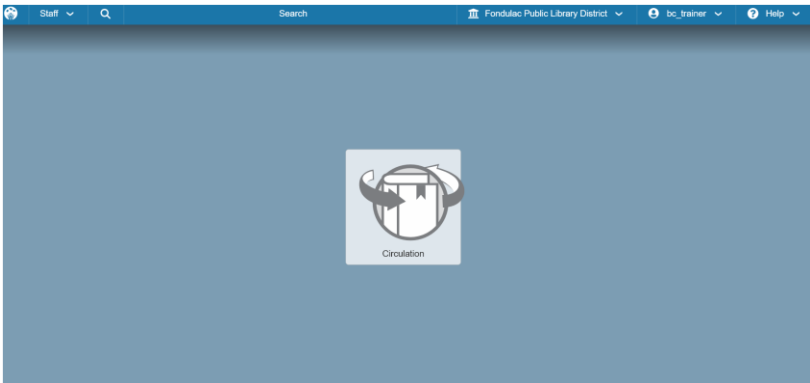
This guide covers Patron Search, Registration, and Copy and Delete.

Contents

For the sake of this training, the terms User and Patron may be used interchangeably.

Patron Search

Start by clicking on Circulation
The first time you do this in a new browser you will get a dialog box to select your profile.
Click on the down arrow on the right side and select the profile for your library.

Ensure the Patron Search is selected, which should be the default. If it isn't, click the
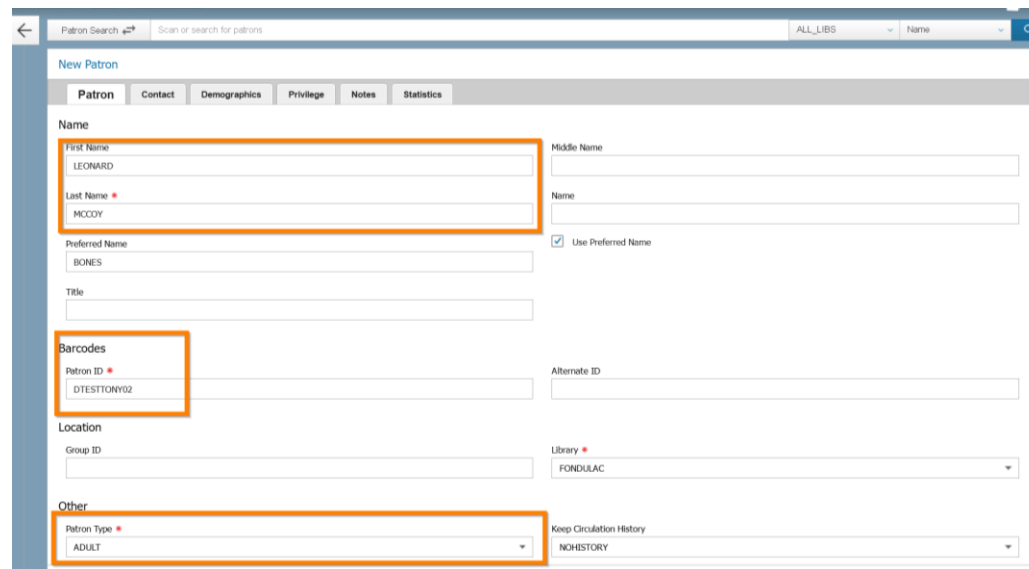Catalog Search button to swap it to Patron Search.

By default, the Patron Search is set to ALL_LIBS and will search by name

However, you can just as easily scan a User ID/ barcode and to lookup a User.

User Registration

Be sure to follow the Patron Registration Policy found on our Support Site:
https://support.librariesofrsa.org/project/users/

Under Barcodes > Patron ID is where you'll scan in the patron's barcode.
If you try to save your progress before all system required fields with a * are entered, just close the popup that appears. For example:


Fill out all of RSA's necessary fields, including Barcode, First Name, Last Name, Preferred

Name (if they have one, check the box to Use Preferred name) and Patron Type. Patron Type is what WorkFlows calls Profile name. Every field should be entered in ALL CAPS (except Email which comes next in the Contact screen.) Schools may opt to use Group ID for homeroom or even a Student ID.

Before you hit the Save button at the bottom of the screen, we're going to click into most of the other Tabs to ensure we're filling out the User details completely.

Note: The "Name" field in this tab will automatically populate after work is saved.
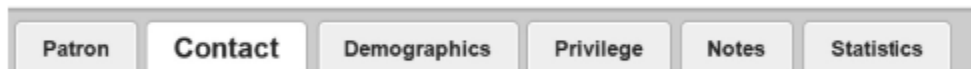
The Contact tab will be the place we enter detailed Address Info, Phone Number and Email address. These continue to be in ALL CAPITAL letters, except for Email address.

If you are using a secondary Address and want to use it as the Primary Address, there is a blue underlined link that you can use to change between Primary Addresses.

We will not use the "Switch to Field Configuration Mode."

Next, move over to Demographics tab and be sure **User cat 1 and Birth Date** are entered if your library is a public library – make sure **User cat 6** (graduation year) is entered if you are a school library.

In the Privilege tab, you can optionally change the Privilege Expires date, but if you don't, it will automatically set to 3 years from today's date.

Note: Date Created and Privilege Granted will automatically fill out with today's date.

If you changed the PIN for the patron, you'll see this once you try to save:

Override is simply 'rsa' without quotes. This code is not case sensitive.

The Notes tab contains all the Notes fields and may be used to jot down relevant notes. Notes in the database should be kept professional and contain your library, initials, and date. Refer to the Users page for more information and RSA's policy on Patron Notes.


Scroll down on the Notes page to see the ALRT_POPUP field.

Note: The Statistics tab will automatically fill out and is not required for registration. Click Save and you are done with registration.

Patron registration was successful
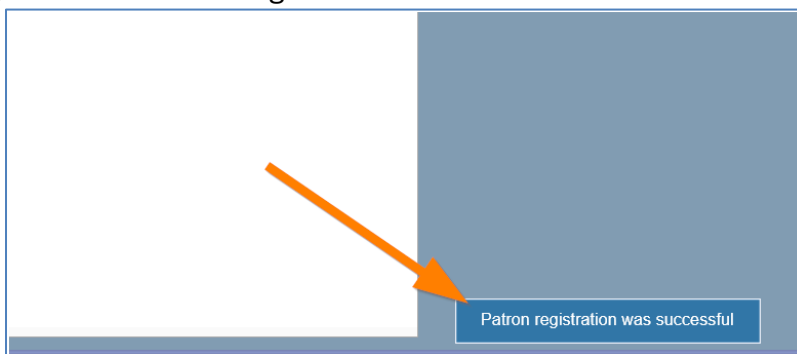
The above message appears when you save.

You can now checkout to this person under their new card. See the Basic Circulation in BLUEcloud Circulation Guide for more details on checking out items.

The image below shows how your cursor (at the top right) will be set up to begin checkout scans immediately after registering a patron.
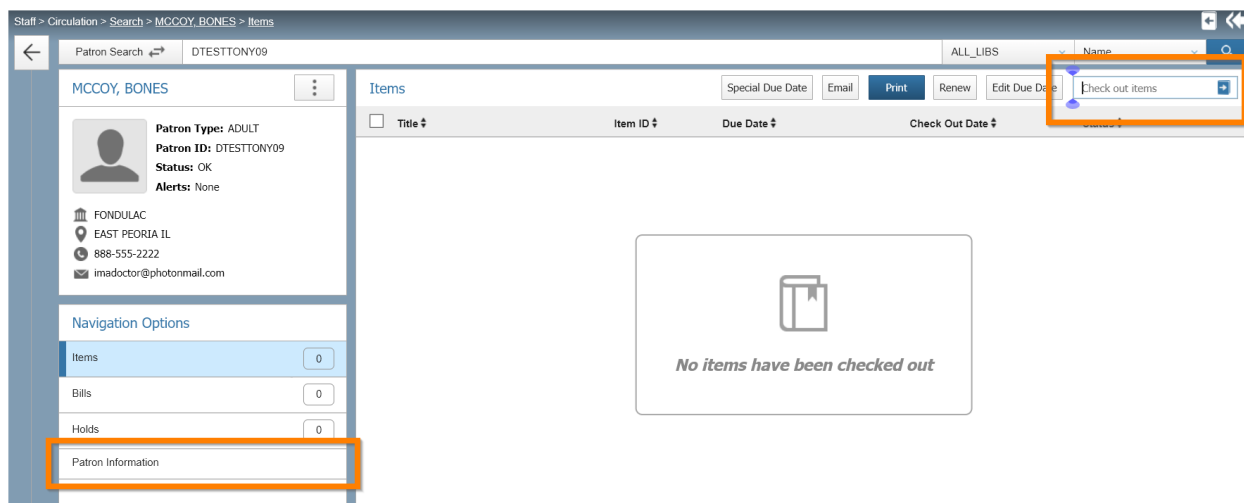
Edit Patron Information (previously called Modify User)

Pictured above: If you want to edit the patron's info, click on "Patron Information" tab in the bottom left under Navigation Options.
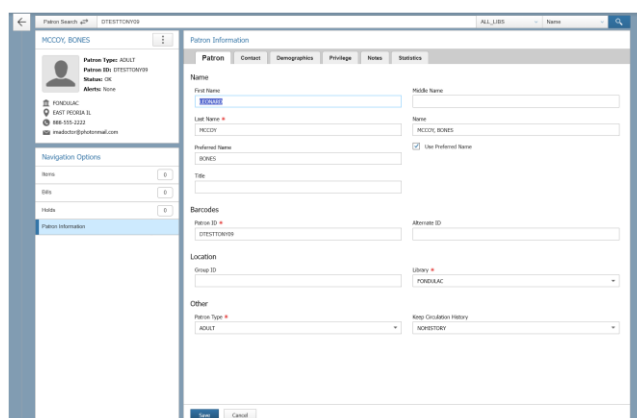
If you change something in Patron Information and Save, this message shows in the bottom right corner:

Patron modification was successful

Copy and Delete

Copy Patron
Copying a user is a useful way to carry over parts of one User's profile to another registration, for example, when family members are registering together.
Fields such as Last Name and Address/Phone number fields in the Contact tab will automatically populate. Change the Patron type (Profile) to the appropriate Profile.

Other fields will auto-populate, like the Registration process, these include Name, and Date Created, Privilege Expires. Ensure all the required fields are completed.

When complete, Save using the button at the bottom of the screen.
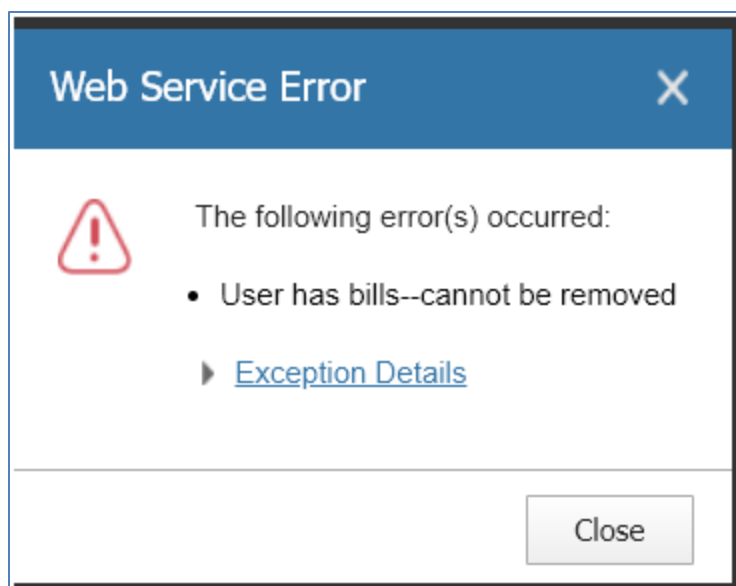
Delete a User
Upon clicking the Ellipsis menu and Delete Patron, you will see this box. Choose Yes to go through with the deletion.

The User will be deleted if there are no charges or items on the card. If there are charges or items on the card, you will get an error like this:

You will be able to delete the User once you have resolved the bills and/or discharged the items on this card.

Deleting a user will take you to the Circulation Search homepage. There will be a little message in the bottom right corner that reads *"PATRON, NAME" was successfully deleted.*
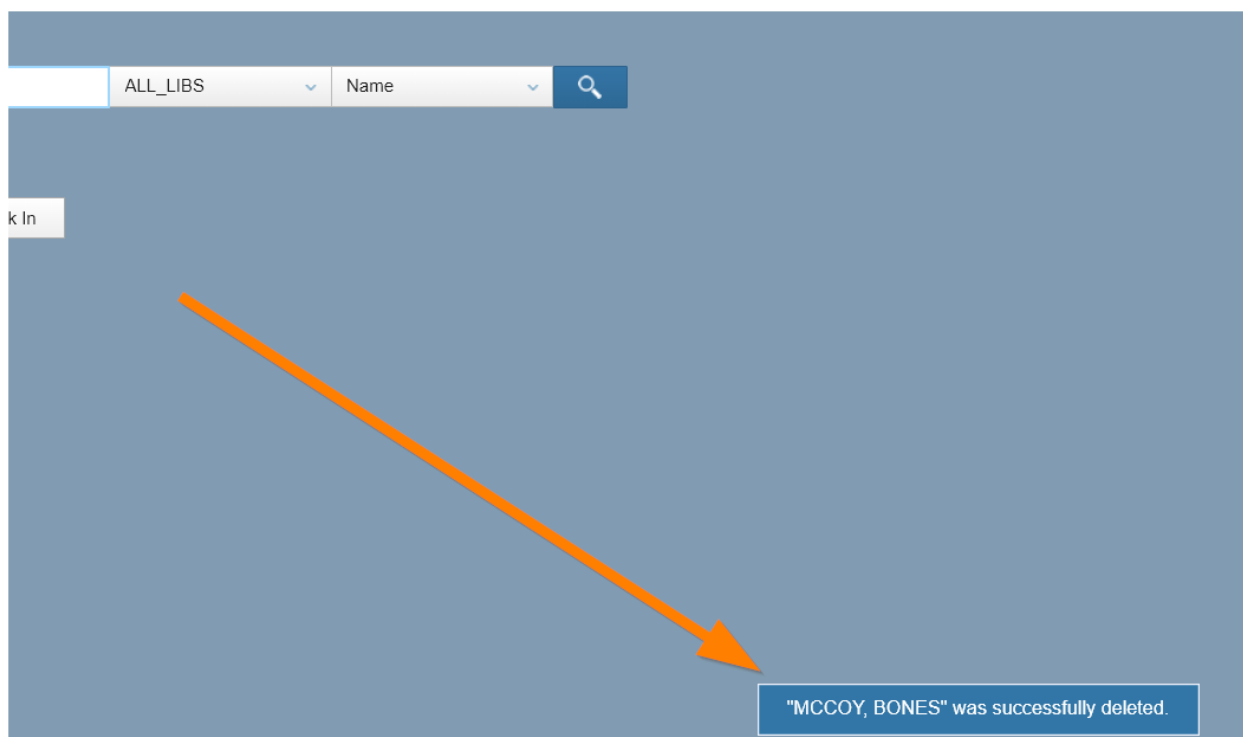
Contact the RSA Help Desk at help@rsanfp.org or 866-910-4083 for help in using BLUEcloud Circulation.