User Registration for Public Libraries Guide

Last Updated: October 1, 2025

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Background

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

RSA's policy is one card per patron unless addressed in the exceptions in the above policy.

Setting Defaults in Properties for User Registration and User Search

Properties will need to be set once on each computer.

Log into WorkFlows using your Circulation user.

In the Circulation or Circulation+ Module, right click on the User Registration Wizard.
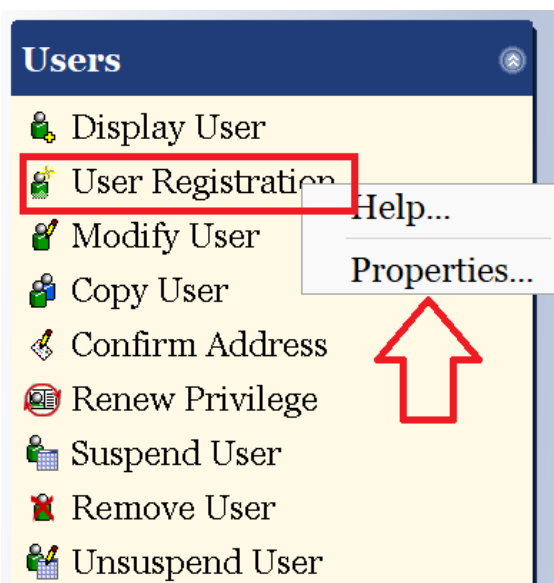
Click on Properties and select the Defaults Tab to check the following:
Library: Your library code
Profile Name: Most used profile
[ ] Uncheck Track charges as Favorites
UserCat1: Your library code

Setting Properties for User Search

A library may decide to leave the default User Search set to ALL_LIBS (All Libraries) or set it to their own library. This is a per-library choice, but when searching for duplicate users during registration, please be sure to have ALL_LIBS selected.

The Display User > User Search Helper properties screen only allows changes using the Supervisor/SUPER WorkFlows login. Changes made to the User Search Helper properties apply globally to User Search Helpers in other wizards. A guide to making these one-time changes is on the support site here: https://support.librariesofrsa.org/project/setup-config-backup/#WorkFlows_Supervisor_Setup_Guide

Backup Reminder

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.

User Search Helper

As mentioned above, the policy for RSA is one card per patron (with exceptions). So, the step for checking for duplicates in the system prior to registration is an important one. Additionally, prior to registration you will want to ensure the patron lives in your library district or service area and they are eligible for a card. Though you will follow your own library's procedures for determining card eligibility – this map is a tool for address lookup.

User Search should be utilized for searching the RSA database for anyone with the same name and identifying potential duplicates if they have the same name and birthday. If that account belongs to your library, it needs to be modified, instead of issuing a new card. If that account belongs to another library, please follow the Duplicate Patron Deletion Guide.

There is a video to accompany this step here:
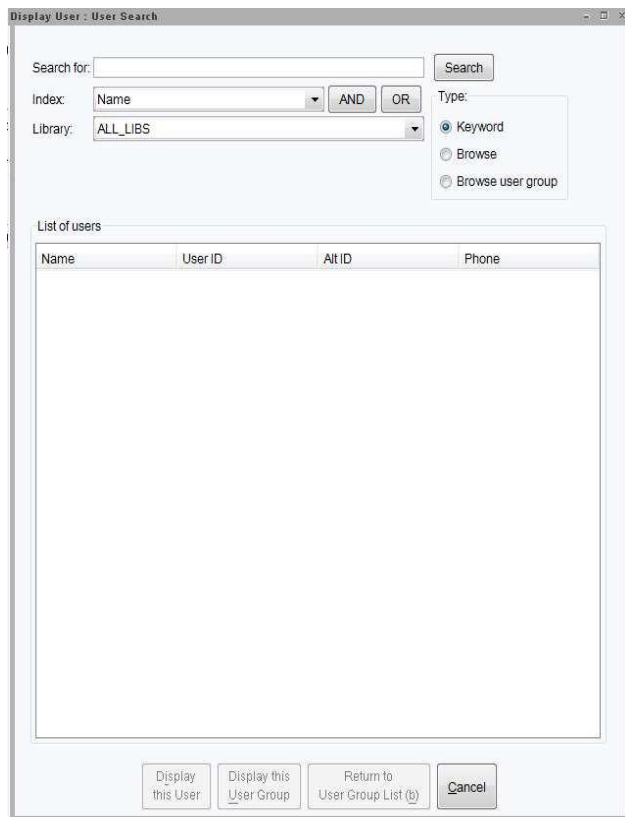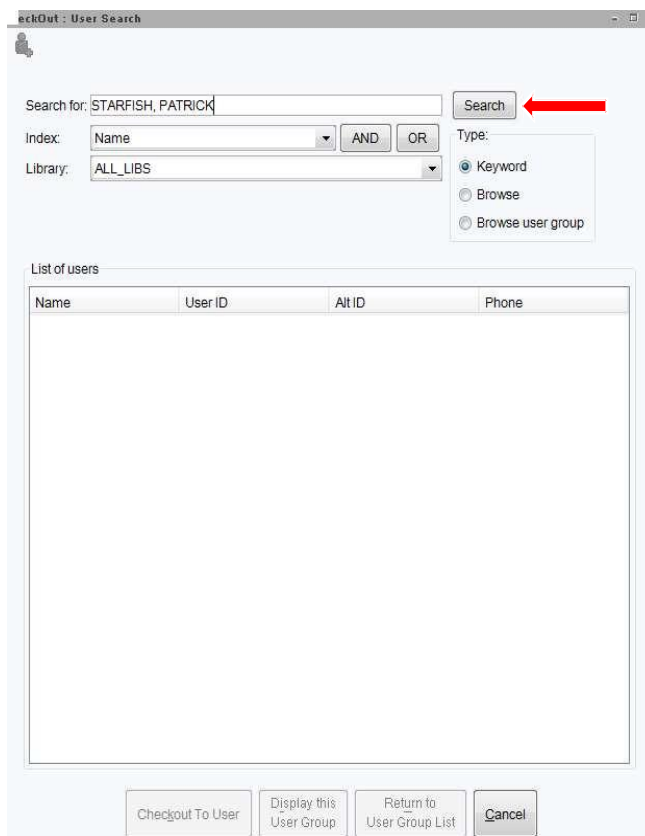https://www.youtube.com/watch?v=xI8wiXXGD7c

Wizards in WorkFlows contain a Helper bar located across the top. The helpers contained within a wizard provide easy access to information needed by the currently opened wizard.

The User Search Helper looks like a person with a magnifying glass and is located on the Helper bar—at top left of each wizard that requires a User ID.

Clicking the User Search helper 🧍 opens this pop up:

To 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.

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.

The search result will display any patron(s) found with the name entered in the "Name" box. Exact and complete spelling is required.

Clicking the "Display this User" button or double clicking the entry will select the highlighted user back inside of 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" this can't be changed for Browse
- *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.
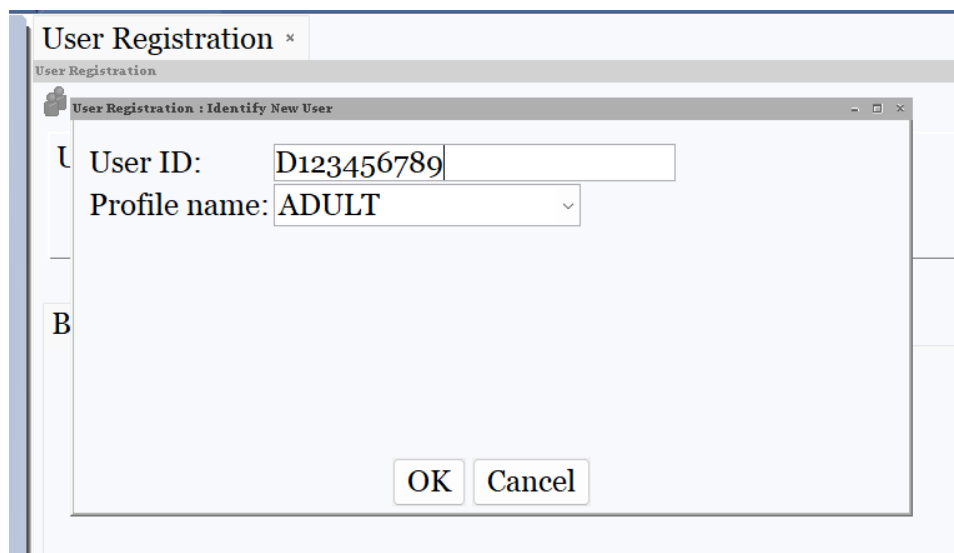
Registering Patrons

Open the User Registration wizard.

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 User Profiles 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

In the Privilege tab, the following information is REQUIRED:

Privilege Expires: this will default to the date attached to the user profile which is usually 3 years. It can be changed via the widget or entering a date. Dates are 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.
When you change any of this information, you will need to put in the Override code which is RSA.

(RSA can help you set a default PIN for all new patrons registered. Email the RSA Help Desk at help@rsanfp.org. Examples are the library name, the last four of the library cards, etc.)

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.***

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.
- 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.
- Language: The default is English.

In the Addresses Tab, the following information is required:

|	
PHONE	866-555-5555
DAYPHONE	
STREET	715 SABRINA DRIVE
CITY/STATE	EAST PEORIA IL
ZIP	61611
EMAIL	abcxyz2@gmail.com
CARE/OF	

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

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

Save	Check Duplicate User	Register Another User	Close

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

WF User Registration : Warning   ✕
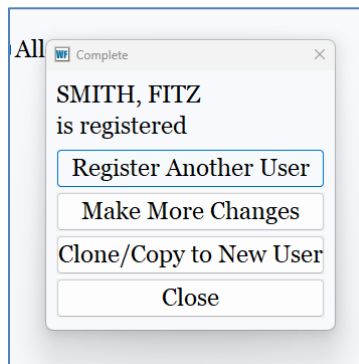
⚠ No duplicate users found

OK
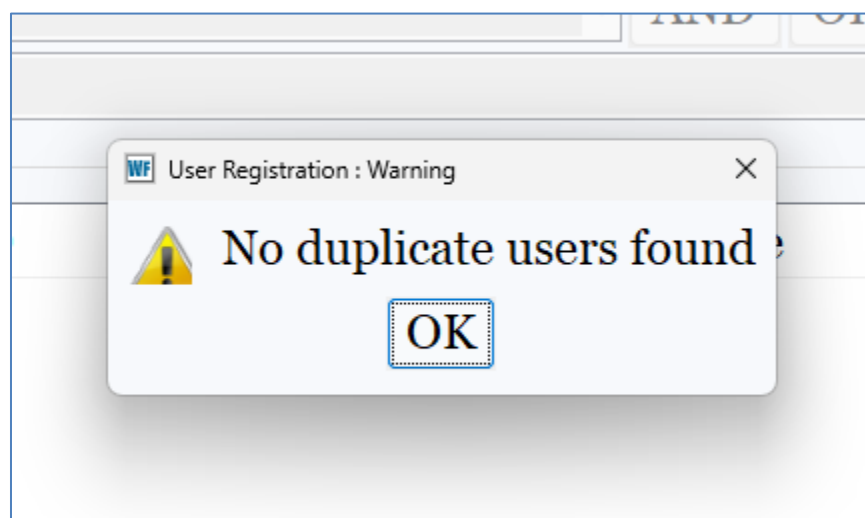
If there is another account in the system with that same name, the new account will pop up for verification. Please make sure you are not creating a duplicate account. If that account belongs to your library, it needs to be modified, instead of issuing a new card. If that account belongs to another library, please follow the Duplicate Patron Deletion Guide.

Once that account has been verified, hit Save.

Save | Check Duplicate User | Register Another User | Close

If you get this pop-up box, the patron has been successfully registered:

All | Complete ×

SMITH, FITZ
is registered

Register Another User
Make More Changes
Clone/Copy to New User
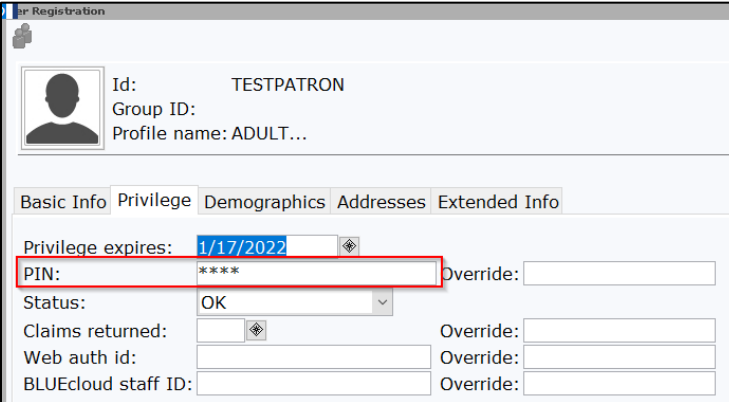Close

Patron PINs in WorkFlows

Patron PIN masking in WorkFlows obscures the PIN display in the User Registration and Modify User wizards display in WorkFlows. Staff simply see **** instead of the patron's PIN.

PINs When Creating a New User

When registering a new patron you will see **** for the PIN. The system either randomly generates a PIN or, for those libraries that have requested it, the PIN will be the standard pre-set PIN you selected. (Note: pre-set PINs only work if default library is set to your home library. See the "Setting Defaults" section, above.)

Note: Contact the RSA Help Desk for more details about your pre-set PIN rules.

- To change the starting PIN, click in the field to highlight the **** and type the new PIN.
- You will only see asterisks (***) as you type the new PIN, not the numbers and letters.
- Enter the standard override "RSA" in the override box to finish setting the PIN.

PINs are NOT case sensitive.

Resetting a Patron PIN

When patrons contact the library requesting their PIN, use your local procedures to determine if you will share the PIN over the phone or email or require the patron to ask in person.

To Reset a Patron's PIN, start by opening the Modify User wizard, pull up the patron's account and selecting the Privilege tab.

If the patron told you what to use for their PIN: simply enter that PIN. Use any combination of letters and numbers 4 digits or longer.

If the patron has not told you their desired PIN: we recommend Public libraries use the patron's birthdate (in 8-digit form MMDDYYYY) as the temporary/initial PIN. School and Special libraries can use something like the school mascot, graduation year, or school ID number of the student. Using a local standard temporary/initial PIN will allow all staff to provide the same help and advice to patrons with PIN issues.

- Click in the PIN field to highlight the old PIN (****) and type in the new PIN.
- You will only see asterisks (****) as you enter the new PIN, not the numbers and letters.
- Enter the standard override, "RSA" in the override box to finish setting the PIN.

Each library should develop and follow their own standard practice for when and how to change patron's PINs. Details of contact or in-person requirements for changing patron PINs are up to the individual member libraries.

Troubleshooting RSAcat login issues or other accounts requiring the patron PIN

When a library staff member troubleshoots a patron issue that requires them to log in as the patron, they need to know the patron's PIN. If the patron did not tell you their PIN when requesting help, you will need to reset the patron's PIN to access their account.

Reset the patron's PIN to a known value like their 8-digit birthdate. Follow your library's procedures on resetting patron's PINs. When the patron is contacted with the results of your troubleshooting, remember to inform them that their PIN had to be reset and what the patron's new/temporary PIN is.

Patron PIN Change and "Forgot my PIN" in RSAcat

Patrons can change their PIN in RSAcat by logging in and going to the My Account page, Personal Information tab, Change PIN section.

Alternatively, patrons with their email address entered in WorkFlows can use the 'Forgot my PIN' feature in the RSAcat Log In window. Clicking this link sends the patron an email that allows them to reset their PIN without knowing the current PIN. *If their email address is missing or incorrect, the system cannot inform the patron. In this case, the patron will not receive an email, and the link will effectively do nothing.*

Patron Enters their ID.
Once the patron enters their PIN and clicks Submit, they will see the following message.

Assuming the patron's email exists and is correct, they will receive an email with a link to the reset page in RSAcat. This is where they enter their card number and new PIN.

Patron Photos in WorkFlows

Patron photos can be added while using the **User Registration** wizard or afterwards using **Modify User**. Your local library procedures determine if this is required.

### Adding, Modifying or Deleting a Patron Photo

1. In the Modify User wizard, pull up the patron you wish to add/change /delete the photo for. Then click on the patron's photo or the silhouette in the photo location.
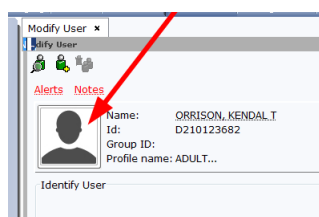

2. Clicking the patron's photo opens the Update User Photo helper window.

3. If you have an existing photo on your computer, click the "Get Photo From File" button. This will open an Open file dialog on your screen. Choose a photo, click Open. Then, click OK on the file selection window: it will show the chosen photo in the Update User Photo window.

4. Click the "Square" checkbox in the upper right to crop the photo. You can drag and reposition the crop of the photo. When finished, click the "Save User Photo" to exit the helper and save the image to the patron's record.
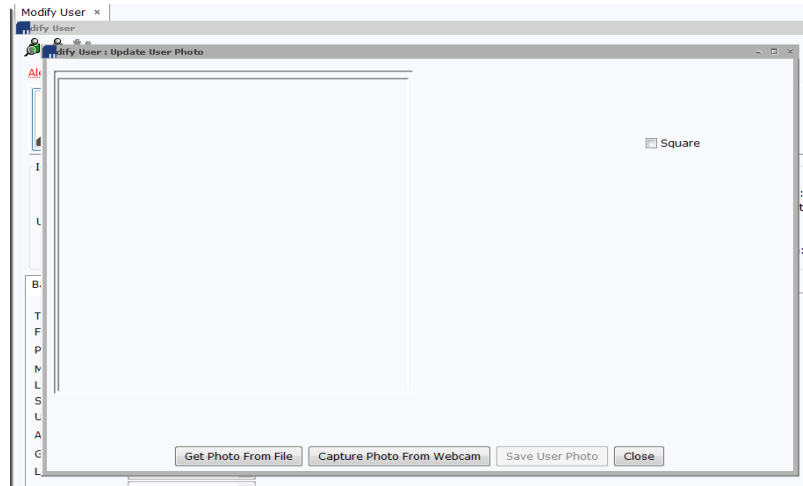
5. If you would like to use a webcam to capture the user's face, click the "Capture Photo From Webcam" button. This will launch your webcam (added to a desktop or built into your laptop) and show the live image on the screen. Arrange the patron to capture a head and shoulders shot and press the Capture button in the live preview window.

6. Again, you will want to check the checkbox next to the word Square beneath the small preview window. Then adjust the main picture window to show the area you want to see in WorkFlows. In this example, I removed the chair to the left of the screenshot. When finished click the "Save User Photo" button to save the image to the patron's record.
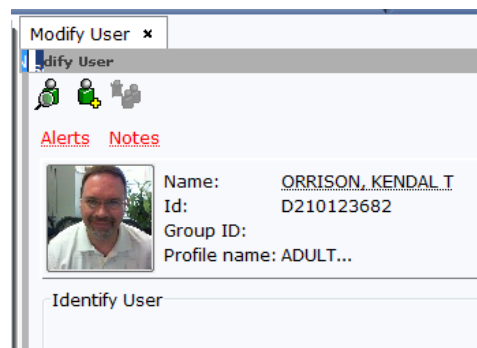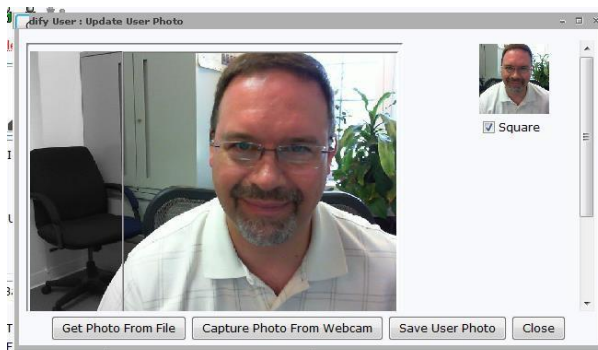
Special Instructions for Registering Bloomington PL Patrons

Registering Bloomington Patrons at RSA Libraries (Except at Normal PL)

Please register Bloomington PL patrons as one of the following patron types:

NON-RSA-A (adults and/or all patron types if you don't use the other user profiles)
NON-RSA-JV (juveniles)
NON-RSA-SR (seniors)
NON-RSA-ST (students, not commonly used)
NON-RSA-YA (young adults)

This replaces the 2006 policy of referring all Bloomington patrons to Normal PL for registration. It also makes dealing with all non-RSA reciprocal patrons the same across the board.

None of the NON-RSA patron profiles are allowed to place holds in RSAcat unless a library specifically allows those patron profiles. Currently, only Alpha Park, Carthage, Farmington, Galesburg, Pontiac, and Henry allow holds by NON-RSA profiled patrons.

Registering Bloomington Patrons at Normal PL

Only Normal PL staff should assign these profiles and only when registering Bloomington patrons at Normal PL.

NP_BLOOM-A (adults and/or all patron types)
NP_BLOOM-J - (juveniles)
NP_BLOOM-S - (seniors)
NP_BLOOM-Y - (young adults)

For additional information or if you have questions, please contact the RSA Help Desk at help@rsanfp.org or at 866-940-4083.