



## User Registration for Public, Academic, and Special Libraries Standard

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This standard does not apply to School Libraries. School libraries should instead use the [User Registration for School Libraries Standard](#).

The [User Accounts Policy](#) governs registration of users in RSA libraries.

The standards below are followed for every card entered that belongs to individuals. This does not include standards for library-use cards or other institutional cards.

### Name entry Standards

- Entries are written in ALL CAPITAL letters. Ex: MCNAIR not McNair, or McNAIR.
- Use of the Title field is optional.
- No punctuation or spaces are used within names, including the apostrophe ('). Ex: OBRIEN **not** O'BRIEN; VANWINKLE **not** VAN WINKLE (but DO use hyphens (-) in hyphenated names, examples: JONES-SMITH)
- Use of preferred name field is optional
- For names with suffixes, use the suffix field. Example: JR, SR, II.

Academic and special libraries are exempt from the requirements below and do not need to enter patron information beyond the name fields.

### User Cat and Demographics Standards

When registering a new user in WorkFlows the following fields are used to gather demographic information which can be used to populate reports.

- **(Required) User CAT 1:** Defaults to WorkFlows library name entered in the Properties settings.
- User CAT 2-12, Department: (All are optional for Public and Academic libraries) More information can be found in the [User Registration Guide](#).
- **(Required) 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.**

### Address standards

- Entries are written in ALL CAPITAL letters.
- Use a hyphen if entering a 9-digit zip code.
- Spell out numeric street names only when there are duplicate street names within a postal delivery area.
- Use Postal Service Standard Abbreviations when entering addresses.
- Do not use punctuation in City/State field, just use a space. Ex: WASHINGTON IL.
- If a patron has a separate physical and mailing address, enter both and select the appropriate option for primary address.
- Include area code and hyphens when entering the telephone number. Do not use parentheses. Ex: 000-000-0000 **not** (000)-000-0000.
- It is recommended that emails are entered for all patrons so they receive automated notices. Patrons can receive notifications at multiple email addresses by entering them on the same line, separated by a comma with no space. Emails do not need to be entered as CAPITAL letters, i.e.:
  - [astone2020@gmail.com,robotnic@yahoo.com](mailto:astone2020@gmail.com,robotnic@yahoo.com)