



Using the Modify User Wizard Guide

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Background

Refer to the [User Accounts Policy](#) for allowed changes to another library’s patron:
“An RSA Reciprocal Borrower must return to their home library to renew their card. Changes may be made only to telephone numbers, email addresses, or PINs in their user account in WorkFlows by the checkout library. RSA Reciprocal Borrowers should be directed to their home library for all other user account changes. The home library is the one that issues the card to the patron.”

Also see:
[User Registration for Public, Academic, and Special Libraries Standard](#) and the [User Registration for Public Libraries Guide](#) or the [User Registration for School Libraries Standard](#) and the [User Registration for School Libraries Guide](#).

Updating the User Privilege Expiration Date

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Verify patron contact information.
- Select the Privilege tab.
- In the Privilege Expires box, enter the new card expiration date.
- Enter the usual override in the Override box.
- Select Save.

Modify User x

Alerts Notes

Name: KWERAM, patty
Id: PKDEMO1
Group ID: 2037
Profile name: ADULT...

Identify User

User ID: PKDEMO1

Basic Info **Privilege** Demographics Addresses Extended Info

Privilege expires: 12/31/2024
PIN: *****
Status: DELINQUENT
Claims returned: 0
BLUEcloud staff ID:
Override:
Override:
Override:

Get User Information **Save (o)** Modify a Different User

Resetting a User's PIN

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Select the Privilege tab.
- Click into the PIN box to highlight the existing PIN indicated by *****.
- Enter the new PIN. The PIN will be masked by *****.
- Enter the usual override in the Override box.
- Select Save.

Modify User x

Alerts Notes

Name: KWERAM, patty
Id: PKDEMO1
Group ID: 2037
Profile name: ADULT...

Identify User

User ID: PKDEMO1

Basic Info **Privilege** Demographics Addresses Extended Info

Privilege expires: 12/31/2024
PIN: *****
Status: DELINQUENT
Claims returned: 0
BLUEcloud staff ID:
Override:
Override:
Override:

Get User Information **Save (o)**

Creating or Removing a Note in Extended Info

See the Patron Notes Guide for details:

https://support.librariesofrsa.org/project/users/#Patron_Notes_Guide

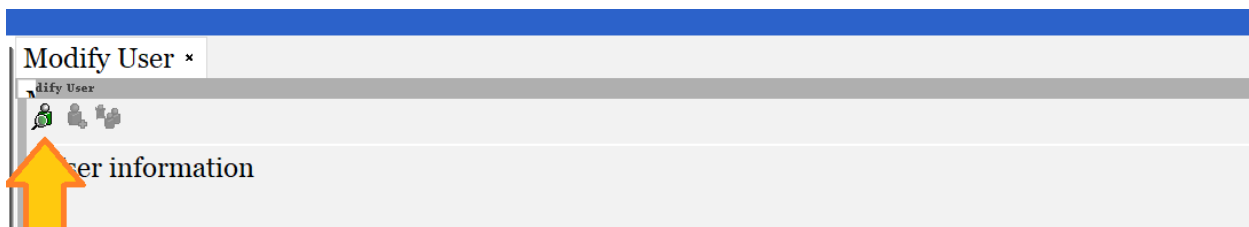
Replacing a Lost Library Card for Your Patron

Do not modify an existing card when a patron moves to a different library service area. A new account is made by the new library and the old account is removed using [Duplicate User Deletion Procedure](#).

There is a video guide which can be found here:

<https://www.youtube.com/watch?v=2Oa6iQsW2Tw>


1. Use the Modify User Wizard to look up patron using the User Search Helper.



2. Once you find them, verify you have the correct patron and that the address and contact information is correct. Update in the Addresses tab if needed.

3. In the Basic Info tab click on the User ID field to highlight it.

Modify User *



Name: NASLUND, RORY E
Id: SNDEMO1
Group ID:
Profile name: ADULT...

Identify User

User ID: SNDEMO1

Basic Info

Privilege

Demographics

Addresses

Extended Info

Title:

First name: RORY

Preferred name:

Middle name: E

Last name: NASLUND

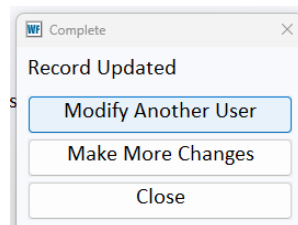
Suffix:

User ID: SNDEMO1

Alt ID:

Group ID:

4. Scan the new library card barcode and the patron will be updated.
5. A confirmation message will appear:



6. Select Make More Changes to update the PIN if necessary (especially for those libraries that use the last 4 digits of the library card as the PIN).
7. Inform patron that they will need to use the new barcode/PIN to re-login to any digital library apps.

Updating Contact Information

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Choose the Addresses tab.
- After verifying that they still are in your library service area, update patron's contact information.
- Select Save.

Modify User

Alerts Notes

Name: KWERAM, patty
Id: PKDEMO1
Group ID: 2037
Profile name: ADULT...

Identify User

User ID: PKDEMO1

Basic Info Privilege Demographics **Addresses** Extended Info

PHONE 866-940-4083*
DAYPHONE
STREET 715 SABRINA LN
CITY/STATE EAST PEORIA IL
ZIP 61611
EMAIL patty.kweram@railslibraries.org
CARE/OF

Address 2

Get User Information **Save (o)** Modify a Different User Close

Changing User Status

OK, DELINQUENT, and BLOCKED statuses are set by WorkFlows.

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Select the Privilege tab.
- Select the Status drop down menu.
 - BARRED – use to BAR a library card so it can't be used. Staff must add a note to the patron's account to indicate the reason for the BAR.
 - DUPLICATE – use to indicate this is a duplicate user. Use in conjunction with User CAT 11 demographic.

Modify User

Alerts Notes

Name: KWERAM, patty
Id: PKDEMO1
Group ID: 2037
Profile name: ADULT...

Identify User

User ID: PKDEMO1

Basic Info **Privilege** Demographics Addresses Extended Info

Privilege expires: 12/31/2024
PIN: *****
Status: **BARRED**
Claims returned: BARRED
BLUEcloud staff ID

Override: Override: Override:

Get User Information **Save (o)** Mo Differ

- INACTIVE – use to indicate a card is not being used.
- MAN-COLECT – (Manual-Collection) use to indicate that the user is in collections separate from WorkFlows automatic collection status.
- SEE-STAFF
 - Refer to the User Statuses Guide found here:
https://support.librariesofrsa.org/project/users/#User_Statuses_Guide
- Enter the usual override in the Override box.
- Select Save.

Updating User Profile

Commonly used when a JUV patron ages into YA or ADULT.

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Select the Basic Info tab.
- Click into the Profile name field.
- Select the new profile. Contact RSA to add or remove profiles from the drop-down menu.
- Select Save.

NOTE: DO NOT change the Charge History rule in WorkFlows. The patron must do that in their RSACat account.

The screenshot shows the 'Modify User' window with the 'Basic Info' tab selected. The 'Profile name' dropdown menu is open, showing a list of options. The 'JUV' option is highlighted in blue. The 'Charge history rule' is set to 'ADULT'. The 'Library' is set to 'LP LEX-PLD'. The 'User ID' is 'PKDEMO1'. The 'Group ID' is '2037'. The 'Name' is 'KWERAM, patty'. The 'Id' is 'PKDEMO1'. The 'Group ID' is '2037'. The 'Profile name' is 'ADULT...'. The 'Basic Info' tab is highlighted with a red box. The 'Profile name' dropdown menu is highlighted with a red box.

See the Checkout History Guide found here:

https://support.librariesofrsa.org/project/users/#Checkout_History

Demographics

User CAT 1 is required and should reflect the user's library or library branch.

Birth date is required for PUBLIC library patrons.

Other fields are optional depending on individual library procedures.

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Select the Demographics tab.
 - User Cat 1 = **(Required)** Defaults to WorkFlows library name entered in the Properties settings.
 - User Cat 2 = Gender/Age range demographic. This does not update automatically.
 - User Cat 3 = geographical info (ZIP codes, wards).
 - User Cat 4 = general options for statistics and contact information that print on hold wrappers.
 - User Cat 5 = can be used with PC Reservation or for contact information that prints on hold wrappers.
 - User Cat 6 = used by schools to indicate graduation year.
 - User Cat 7 = used by public libraries that have intergovernmental agreements with local schools.
 - User Cat 8 = used to track special programs or awards.
 - User Cat 9 and 10 = unused
 - User Cat 11 = status of user account.
 - APPROV-DUP – Approved Duplicate - used on a patron account that the patron owning library designated as an approved duplicate account, for example a child of multiple households or a taxpayer in multiple districts.
 - CONF-DUP – Confirmed Duplicate - used for a patron account that the patron owning library designated a duplicate patron account and is ready for deletion.
 - PRIMARY – used on a patron account that the patron owning library has confirmed is the correct card for the patron.
 - RCIP-DEL – Reciprocal deletion – is to be used on a patron account that the patron owning library, or the library issuing the patron a new card when the patron has relocated to a new library service area, has

Modify User

Alerts Notes

Name: KWERAM, patty
Id: PKDEMO1
Group ID: 2037
Profile name: ADULT...

Identify User

User ID: PKDEMO1

Basic Info Privilege **Demographics** Addresses Extended Info

User cat1: AG_ALS-PDC User cat2: User cat3: User cat4: SHOUTBOMB
User cat5: User cat6: 2037
User cat7: User cat8:
User cat9: User cat10:
User cat11: User cat12:
Department: Birth date: NEVER
Language: ENGLISH Age: 0

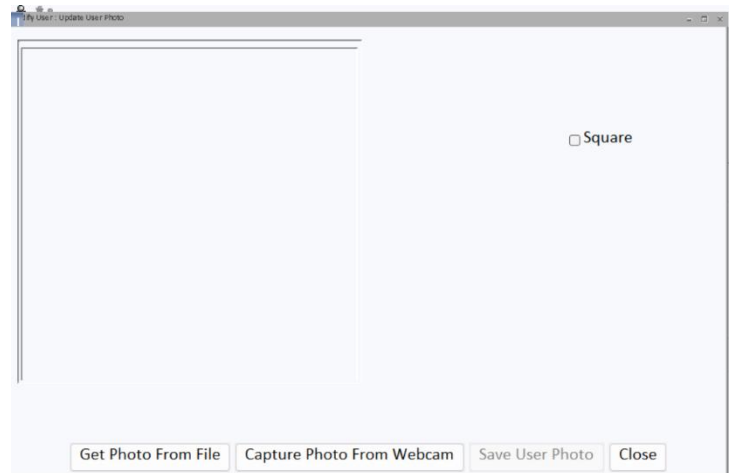
Get User Information **Save (o)**

confirmed is a card in a previous library area that the patron no longer lives in and can be deleted.

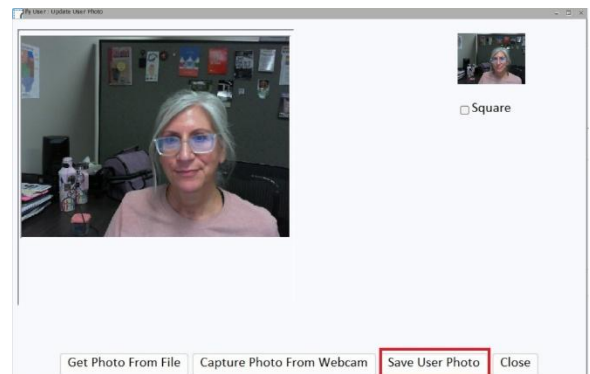
- SUS-DUP – Suspected Duplicate - used on a patron account that the patron owning library is unsure if that account is the primary or a duplicate. It may also be used by RSA to let libraries know that we believe they have an account we suspect is a duplicate user and they need to investigate.
 - User Cat 12 = contact RSA to add codes to track specific user statistics.
 - Department – used for statistics.
 - Language – default is ENGLISH.
 - Birth date: mandatory for public library patrons.
- Select Save when changes are complete.

Adding or Updating a Patron Photo

- In Modify User, scan the patron's barcode in the User ID field or use the User Search Helper to find them by name.
- Click on the image silhouette to open the photo upload box.



- Choose “Get Photo From File” if you have a photo on your computer to upload.
- Choose “Capture Photo From Webcam” to open the default camera on your computer.
 - Choose Capture to take a picture.
 - Choose “Square” to crop and reposition photo.
 - Choose Save User Photo.



Removing Claims Returned Notification

See Removing a Claims Returned Notification Cheat Sheet for details:

https://support.librariesofrsa.org/project/users/#Removing_a_Claims_Returned_Notification

Preferred Name Bug

When using the Modify User Wizard, the first user opened will correctly display the account selection in the “Use preferred name” checkbox (checked or unchecked as appropriate). The first user will be correctly saved.

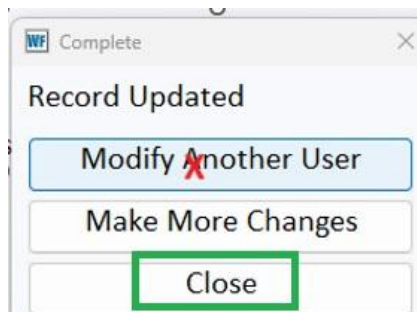
HOWEVER: After opening the first user with the Modify User Wizard, if a new account is opened:

- By choosing “Modify Another User” from the confirmation pop-up window
- Or by selecting “Modify a Different User” at the bottom of the screen

After doing either of those actions, the second account opened will ONLY show the “Use preferred name” checkbox as unchecked, regardless of whether or not this field had been selected on the account previously. If library staff then make changes to the account and save them, the new (incorrect) preferred name selection will also be saved. **This is a known bug which has been reported.**

The Solution/Work Around:

RSA’s recommendation is to choose Close if you need to make changes to another user, rather than choosing “Modify Another User” to switch between users.



Contact the RSA Help Desk at help@rsanfp.org or 866-940-4083.