



Using the Modify User Wizard Guide

Last updated: April 1, 2026

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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.

The screenshot shows the 'Modify User' window with the 'Privilege' tab selected. The user information includes Name: KWERAM, patty, Id: PKDEMO1, Group ID: 2037, and Profile name: ADULT... The 'Identify User' section has 'User ID: PKDEMO1' entered. The 'Privilege' tab is active, showing 'Privilege expires: 12/31/2024', 'PIN: *****', 'Status: DELINQUENT', 'Claims returned: 0', and 'BLUEcloud staff ID:'. There are 'Override:' fields for PIN, Claims returned, and BLUEcloud staff ID. The 'Save (o)' button is highlighted with a red box.

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.

This screenshot is similar to the previous one but focuses on the PIN field. The 'PIN: *****' field is highlighted with a red box. The 'Override:' field for the PIN is also highlighted with a red box. The 'Save (o)' button at the bottom right is also highlighted with a red box.

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=VvOEq-WLD0>.

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

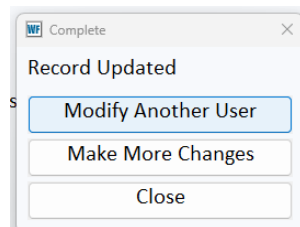


2. Once you find them, verify you have the correct patron and that the address and contact information is correct. Update in the Addresses tab if needed.

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

The screenshot shows a web application window titled 'Modify User'. At the top, there are icons for user management. Below that, a profile card displays the user's name as 'NASLUND, RORY E', ID as 'SNDEMO1', Group ID, and Profile name as 'ADULT...'. A section titled 'Identify User' contains a text input field with 'SNDEMO1' entered. Below this is a tabbed interface with 'Basic Info' selected. The 'Basic Info' section contains several input fields: Title, First name (RORY), Preferred name, Middle name (E), Last name (NASLUND), Suffix, User ID (SNDEMO1), Alt ID, and Group ID. The 'User ID' field is highlighted in blue, and a large green arrow points to it from the right.

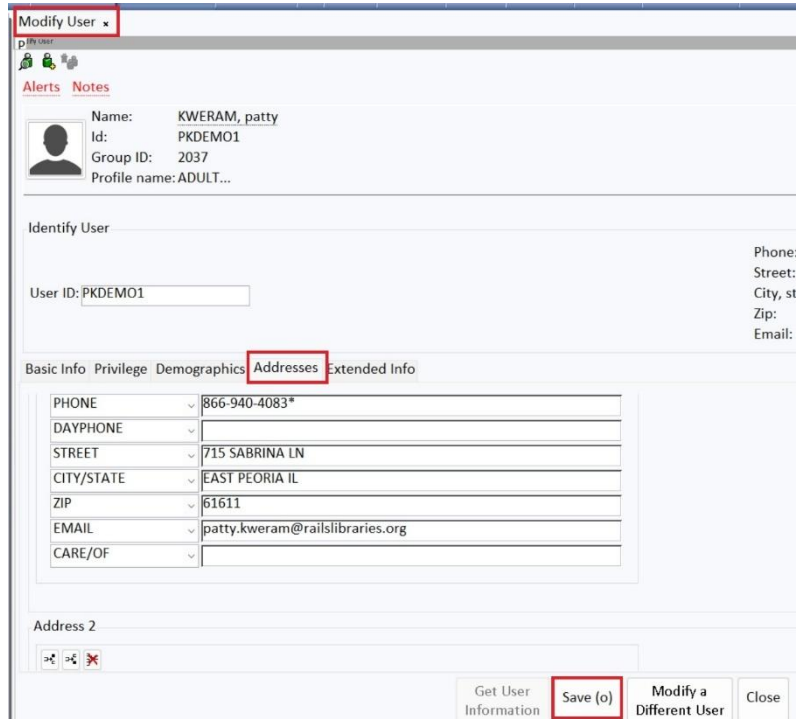
4. Scan the new library card barcode and the patron will be updated.
5. A confirmation message will appear:



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

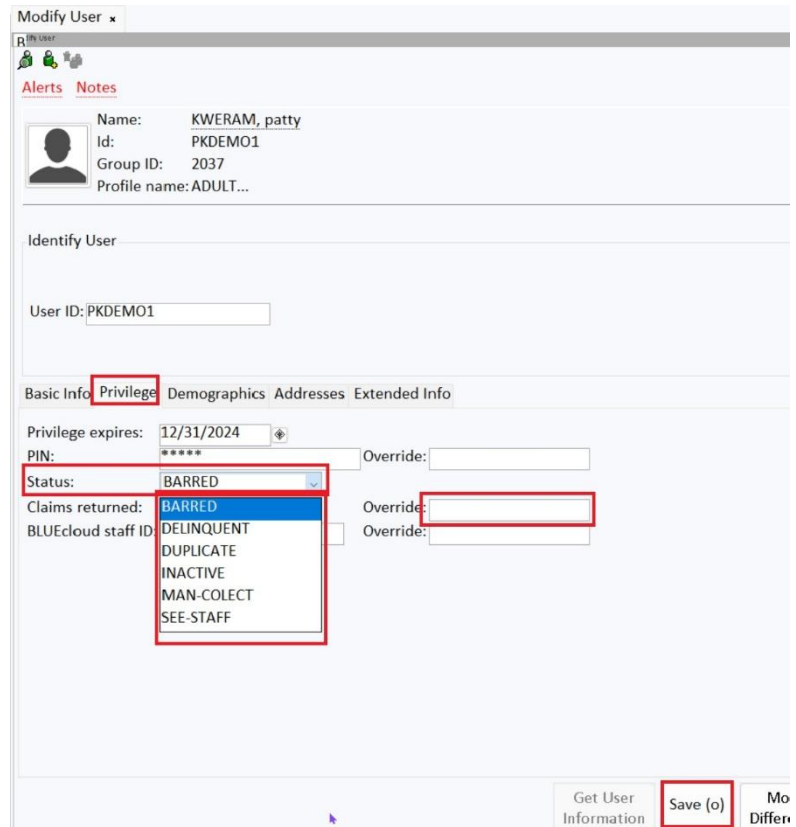
- In Modify User, scan the patron’s barcode in the User ID field or use the User Search Helper to find them by name.
- Choose the Addresses tab.
- After verifying that they still are in your library service area, update patron’s contact information.
- Select Save.



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.



- 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' interface. At the top, there are tabs for 'Alerts' and 'Notes'. Below that, a user profile is displayed with fields for Name (KWERAM, patty), Id (PKDEMO1), Group ID (2037), and Profile name (ADULT...). The 'Basic Info' tab is selected, and the 'Profile name' dropdown menu is open, showing a list of options: ADULT, BKCLUB-NRC, JUV (highlighted), L-USE-NCNT, MEND-NCNT, NON-RSA-A, NON-RSA-JV, and NRES-A. Other fields in the 'Basic Info' tab include First name (PATTY), Preferred name (patty), Middle name, Last name (KWERAM), Suffix, User ID (PKDEMO1), Alt ID, Group ID (2037), Library (LP LEX-PLD), and Charge history rule (ADULT). There are also checkboxes for 'Use preferred name' and 'Allow routing'. At the bottom right, there are buttons for 'Get User Information', 'Save (o)', and 'Modify Different'.

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

The screenshot shows the 'Modify User' window for user 'KWERAM, patty' with ID 'PKDEMO1'. The 'Demographics' tab is active, displaying the following fields:

Field	Value
Name	KWERAM, patty
Id	PKDEMO1
Group ID	2037
Profile name	ADULT...
User ID	PKDEMO1
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

Buttons at the bottom right: 'Get User Information' and 'Save (o)'.

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

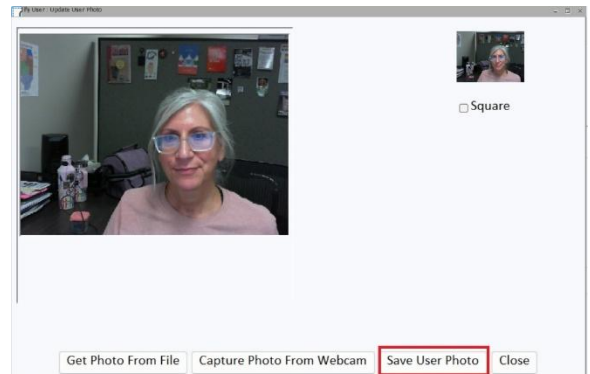
- SUS-DUP – Suspected Duplicate - used on a patron account that the patron owning library is unsure if that account is the primary or a duplicate. It may also be used by RSA to let libraries know that we believe they have an account we suspect is a duplicate user and they need to investigate.
 - User 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.

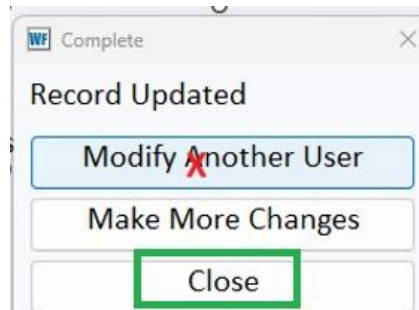
HOWEVER: After opening the first user with the Modify User Wizard, if a new account is opened:

- 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 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@librariesofrsa.org or 866-940-4083.