



User Registration Guide

Last updated: May 5, 2026

There is a video to accompany this guide which can be found here:

https://youtu.be/kKC4LhnrTps?si=Po5x0HTWcfv_K_fl

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Introduction

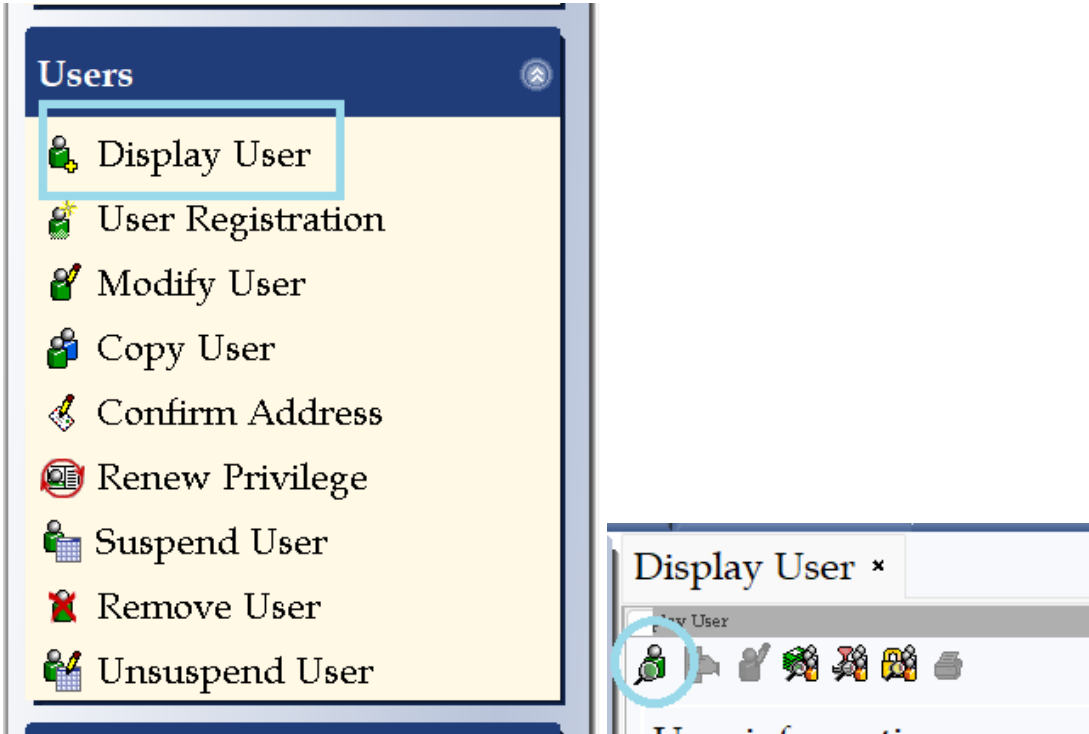
Before you begin, first read the [User Accounts Policy](#). Additional information, standards, guides and cheat sheets specifically related to Users can all be found here:

<https://support.librariesofrsa.org/project/users/>.

School libraries have a different set of standards. See the [User Registration for School Libraries Standard](#) and the [School Handbook](#) for more information.

The Basic Requirements

1. Before registering a new patron, make sure they do not already have an existing card in the system. Using Display User, search their full name. Make sure to search ALL LIBRARIES.



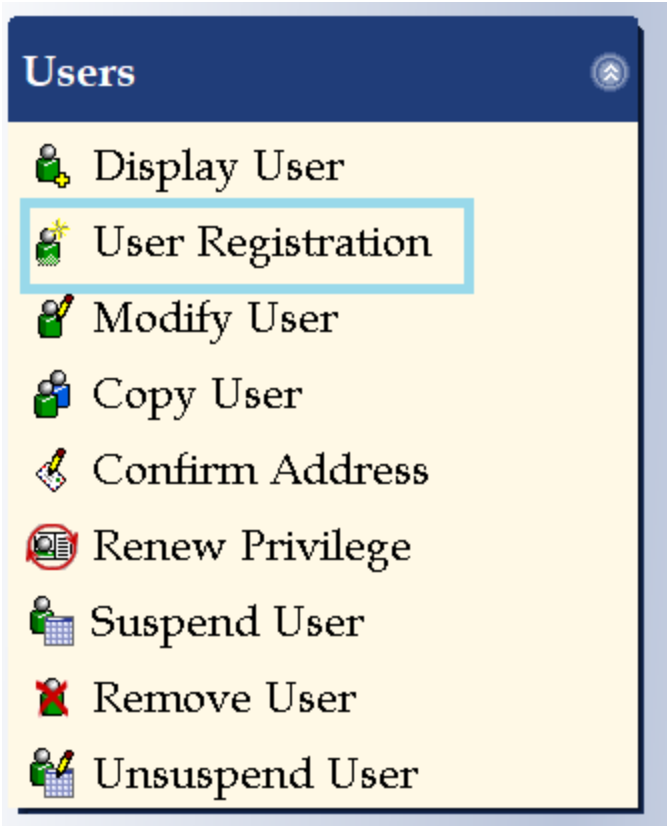
Search for: Search

Index: Name

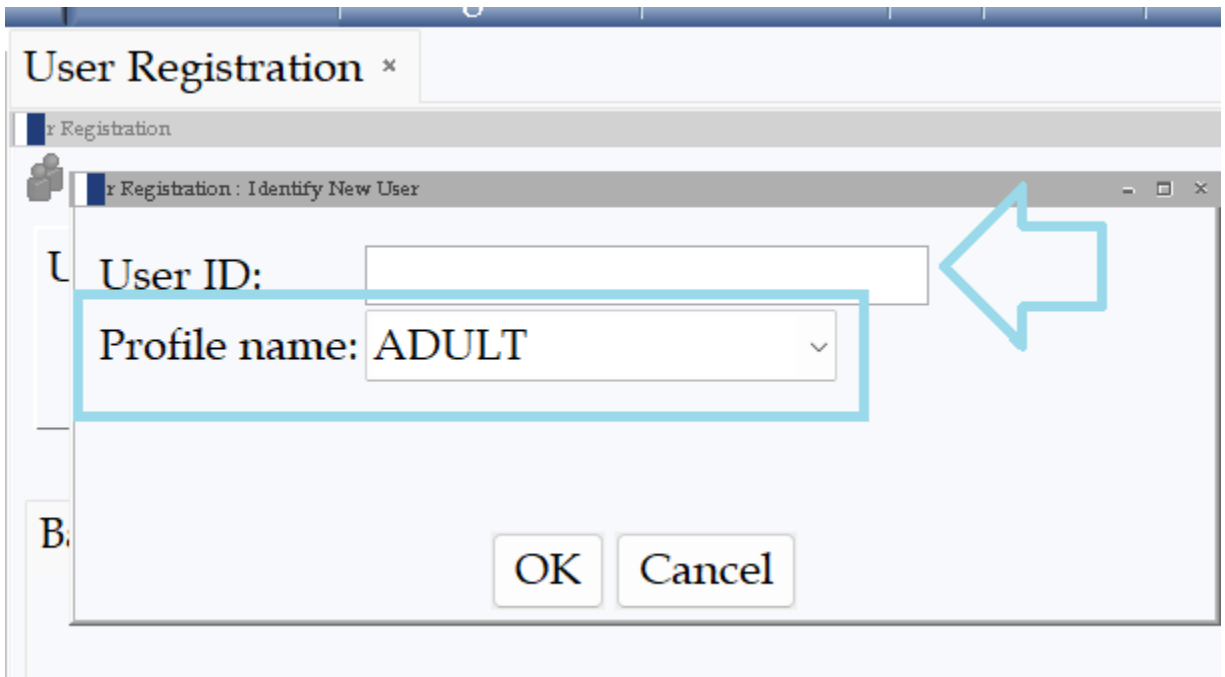
Library: ALL_LIBS

Type: Keyword Browse Browse user group

- a. If the library user already has an account at another public library in RSA, staff at member libraries must request removal of the user account by submitting a [Duplicate User Deletion Form](#) to notify the former library when registering that library user.
 - b. If the library user does not have an account at another public library in RSA and is within your library service area, they can be issued a card.
2. Once a patron has been verified that they qualify for a library card, use the Patron Registration Wizard.



3. Before scanning the new library card's barcode, make sure that the correct User Profile is selected.



4. Per RSA [User Accounts Policy](#), the following fields are **REQUIRED** and must be entered in **ALL CAPS**:

a. *Basic Info Tab*: First Name, Last Name & Library.

- i. Make sure that the correct library and User Profile are selected. If the patron wants to go by a different name (First name William, but prefers Bill), put the legal first name in the First Name line, the Preferred name under that and check the User preferred name box.

The screenshot shows the 'Basic Info' tab of the 'User Registration' form. The 'First name' field is highlighted with a blue box and contains 'BUFFY'. The 'Last name' field is also highlighted and contains 'SUMMERS'. The 'Library' dropdown menu is highlighted and shows 'RANSOM-MEM'. Other fields include 'Middle name' with 'A', 'Profile name' with 'ADULT', and 'Charge history rule' with 'NOHISTORY'. There are checkboxes for 'Use preferred name' (unchecked) and 'Allow routing' (checked).

b. *Privilege Tab*: Privilege expiration

- i. Expiration dates auto populate. That can be changed based on internal library policy. Pin numbers can be set up to a specific default or changed to whatever the patron would like. To change either of these things, you must put in an override code. If you do not know the code, please contact RSA.

The screenshot shows the 'Privilege' tab of the 'User Registration' form. The 'Privilege expires' field is highlighted with a blue box and contains '4/30/2029'. A blue arrow points to this field. The 'PIN' field is highlighted and contains '****'. The 'Status' dropdown menu is highlighted and shows 'OK'. There are 'Override' fields for 'PIN', 'Claims returned', 'Web auth id', and 'BLUEcloud staff ID', all of which are currently empty.

c. *Demographics Tab*: User Cat1 & Birth date.

- i. User cat1 can be set up to auto fill. It can also be used to separate patrons who register at a branch library from a main library. The other User cat fields are not required but can be used to attach useful

internal information to the patron account. **Entering a birthdate is not optional. It is required.**

Basic Info	Privilege	Demographics	Addresses	Extended Info
User cat1:	RANSOM-MEM	▼	User cat2:	▼
User cat3:		▼	User cat4:	▼
User cat5:		▼	User cat6:	▼
User cat7:		▼	User cat8:	▼
User cat9:		▼	User cat10:	▼
User cat11:		▼	User cat12:	▼
Department:			Birth date:	01/19/1981
Language:	ENGLISH	▼		

- d. *Addresses Tab*: Street, City/State, Zip for Address 1.
 - i. Phone numbers and email are not required but are helpful information. The Care/Of field is good for attaching the name of the responsible adult to a Juvenile or Young Adult card.
 - ii. For phone numbers, use ONLY dashes, no parenthesis.
 - iii. In the street address, use Postal Service abbreviations and no punctuation.

Address 1	
PHONE	805-555-8966
DAYPHONE	
STREET	1630 REVELLO DR
CITY/STATE	SUNNYDALE CA
ZIP	94086
EMAIL	
CARE/OF	

- e. *Extended Info Tab*: This can be left blank unless there is a note you need to leave for future staff accessing the account. Notes should always be professional, to the point and signed with your names/initials, date, and library. For additional information on the correct use of notes, see the Patron

Notes section of the [User Accounts Policy](#).

Basic Info Privilege Demographics Addresses Extended Info

NOTE 5.1.26 SN/RMPL: PATRON INTERESTED IN BOOKS ON DEMONOLOGY.

COMMENT

LOSTITEM

STAFF

INACTVID

ACTIVEID

PREV_ID

PREV_ID2

ALRT_POPUP

5. Once all the information is filled in, click the Check Duplicate User button to ensure there aren't any obvious duplicate users in the system. You will NOT be able to save until this button is selected.
 - a. This will check the system based on Birth date, Email, Name, Phone and Street. You may get a duplicate record if there is a matching address, etc. Verify that it is not the patron you are registering and select OK.

Search for:
 USNM =
 SUMMER
 S BUFFY
 OR
 PHON =
 805-555-8
 966 OR
 SLAD =
 1630
 REVELLO
 DR

Search for: Search

Index: Name

Library: ALL_LIBS

User Registration : Warning

No duplicate users found

OK

List of users

Name	User ID	Alt ID	Phone	Birth Date

Cancel

6. You may now Save your patron, and you are Done!

Additional information that is useful to have on registering patrons:

- **User cat 1** is the code of the patron's library. It can be set to fill in automatically.
- **User cat 2** is age demographic. This does not update automatically.
- **User cat 3** is geographic info (ZIP codes, wards.)
- **User cat 4** is communication preference. It doesn't change anything in the system (i.e., choosing Phone won't stop a user from receiving emails, it just denotes to staff that they prefer phone calls.)
- **User cat 5** is a broader age group.
- **User cat 6** is graduation year (required for schools).
- **User cat 7** is school district.
- **User cat 8** is used to track programs and rewards.
- **User cats 9,10:** left blank
- **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 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. RSA may also use it to let libraries know that we believe they have an account we suspect is a duplicate and they need to investigate.
- **User cat 12:** contact RSA to add codes to track specific user statistics.

Allowable duplicate users

RSA's policy is one card per person unless an exception is allowed for in RSA policy.

Allowed Exceptions:

Children of multiple households

Children who live in multiple households with different legal guardians are exempt from the RSA policy of one card per person. They are eligible to have a library card for each household, even if both legal guardians live in the same library service area. The name of the registering parent should go in the Care/Of field.

Property Owner/Taxpayer

Property Owner/Taxpayers are exempt from RSA policy of one card per library user. They are eligible for a library card in each taxing district they own property in. (See [Local Library Act \(75 ILCS 5/4-7 \(12\)\)](#) and [Public Library District Act \(75 ILCS 16/30-55.60\)](#)).

Students and School Staff who have a card at a Public Library

Cards issued at School Libraries may be used only at the issuing library. Those with special school cards may also be eligible for a public library card associated with their residential address.

Special Libraries

Cards issued at Special Libraries may be used only at the issuing library. Those with special library cards may also be eligible for a public library card associated with their residential address.

Staff who work at an RSA member library different from their home library

Staff who work at one RSA member library but are entitled to service at another due to residence are eligible to have cards at both libraries. Staff whose home library and work library are the same are not eligible for multiple cards.

Local library duplicate cards

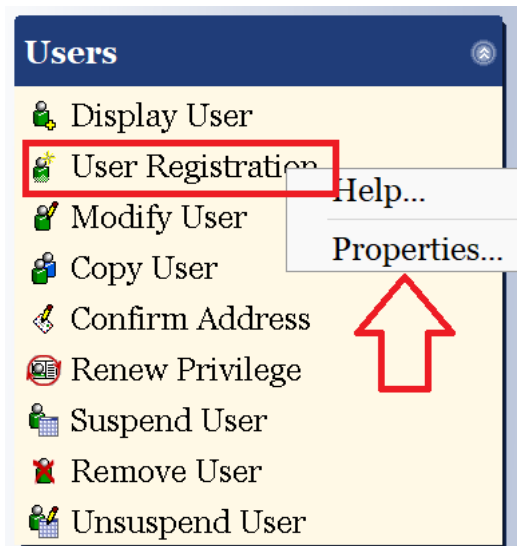
At the discretion of RSA staff, a library may be granted permission to create duplicate cards for their own local use only. Cards issued in these circumstances will only be eligible to check out and place holds on items belonging to the issuing library.

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, 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

User Registration: Set Properties

Display property page: Wizard Startup Never

Behavior Defaults Helpers

Library: RANSOM-MEM Profile name: ADULT

Charge history rule: NOHISTORY

Track charges as Favorites

Focus on: First name Last name

Addresses

Primary address flag: Address 1 Address 2 Address 3

Demographics

User cat1: RANSOM-MEM User cat2:

User cat3: User cat4:

User cat5: User cat6:

User cat7: User cat8:

User cat9: User cat10:

User cat11: User cat12:

Department: Birth date:

Language: ENGLISH

Outreach

Route ID:

Total items limit: 10

Usergroup Membership Tab

Responsibility policy:

OK Cancel

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.

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@librariesofrsa.org or at 866-940-4083 or 309-315-9123.