

Registering a New User

Registering a New User-

Follow the steps below to add a new User to the Symphony database. Use upper case letters. You may use mixed case letters in the email address field because they may be case sensitive. Please remember, neither Drivers License nor Social Security Number are permitted to be recorded in the user record.

- A. In the CIRC Module, open the **User Registration Wizard** located within the Common Tasks Wizard Group.
- B. Scan the new **User ID** (barcode) and choose the correct **Profile Name** (btype) from the drop down box. Click **OK**. Note: if you are using a scanner to enter the user barcode, you will choose the Profile Name in the next step under the Basic Tab.



The screenshot shows a dialog box titled "User Registration (F11) : Identify New User". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The main area contains two labels with corresponding input fields: "User ID:" followed by a text input box, and "Profile name:" followed by a dropdown menu. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

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C. Basic Info Tab-

The screenshot shows a web application window titled "User Registration (F11)". The window has a tab labeled "User Registration (F11)". Below the title bar, there is a header area with a small icon and the text "User Registration (F11)". The main content area is divided into several sections. At the top, there is a box containing the following information: "Id: 349854398573", "Group ID:", and "Profile name: SEOA...". Below this, there is a tabbed interface with the following tabs: "Basic Info", "Privilege", "Demographics", "Addresses", "Extended Info", and "User groups". The "Basic Info" tab is currently selected. It contains the following fields and controls: "First name:" with a text input field containing "TEST"; "Preferred name:" with a text input field; "Middle name:" with a text input field; "Last name:" with a text input field containing "TEST"; "Suffix:" with a text input field; a checkbox labeled "Use preferred name" which is unchecked; a checkbox labeled "Allow routing" which is checked; "Group ID:" with a text input field; "Library:" with a dropdown menu showing "SEO"; and "Profile name:" with a dropdown menu showing "SEOA". At the bottom of the window, there are four buttons: "Save", "Check Duplicate User", "Register Another User", and "Close".

1. Enter the user's First name.
2. Enter a preferred name and/or middle name if desired.
3. If your patron chooses to use a preferred name, (Charlie instead of Charles) and they want it to be what displays on their notices, you must check the Use Preferred Name box.
4. Enter the user's Last name.
5. If needed, enter the user Suffix.
6. Use the dropdown arrow to enter the user's home library.
7. Enter or Verify the User Profile Name.
8. After you have entered the user's name, you **must** click the **Check Duplicate User** button at the bottom of the window. If there are no other Users registered with that name, click **Cancel**. You may also search for the user using the Display User Wizard prior to registering the user. *Depending on your library wizard behavior settings, the Check Duplicate User function may be disabled.*
9. Click on the **Privilege Tab**.

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D. Privilege Tab-

The screenshot shows the 'User Registration (F11)' window with the 'Privilege' tab selected. The form displays the following information:

- Id: 49583459834
- Group ID:
- Profile name: PUBLIC...

The 'Privilege' tab contains the following fields and options:

- Privilege expires: NEVER (dropdown menu)
- PIN: 5211 (text field)
- Status: OK (dropdown menu)
- Claims returned: (text field)
- Web auth id: (text field)

Each of the 'Override' fields (PIN, Claims returned, Web auth id) has an empty text input field next to it. At the bottom of the form are four buttons: 'Save', 'Check Duplicate User', 'Register Another User', and 'Close'.

1. Leave the Expiration date as populated by the system. The system calculates and displays the correct expiration date according to the criteria set by your library. The word "NEVER" will display if your library does not expire the user privileges.
2. Currently the system automatically populates the PIN field when you create a new user with the text "CHANGEME". Ask your patron what they want their PIN to be. We can change a user's pin but it will always require an override. Users will have the ability to change their PIN on e-Library or Enterprise. Users that migrated to Symphony without a PIN will also have the PIN populated with "CHANGEME"
3. Click on the **Demographics Tab**.

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E. Demographics Tab-

The screenshot shows the 'User Registration (F11)' application window. The 'Demographics' tab is selected. The user's ID is 'TESTING' and the profile name is 'SEOA...'. The form contains several fields: 'Gender - Decade of Birth', 'County Township', 'School District', 'Notify by', 'Internet use', 'Birth date' (with a calendar icon), and 'Language' (set to 'ENGLISH'). The 'Notify by' dropdown menu is open, showing options: 'EMAIL', 'NONOTICES', 'SMS', 'SMS_EMAIL', and 'STANDARD'. The 'EMAIL' option is currently selected.

1. Use the drop down fields to fill in the appropriate user categories. These categories are optional. You will populate them according to your library's current policies.
2. Use the **Notify By** drop down to choose how your user wants to receive their notices. Your options are:
 - EMAIL– email only
 - NONOTICES– no notices will be sent
 - SMS– text only
 - SMS_EMAIL– both text and email
 - STANDARD– used for print notices or for libraries that use automated phone notification
3. Use the **Internet Use** drop down to edit your user's internet reservation privileges. Y = yes and N = no.
4. To enter the user's birth date, click on the Birth Date Gadget and use the calendar to establish a date. Click OK.
5. 5. Click the **Addresses Tab**.

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F. Addresses Tab-

Do not use the drop down fields to change an address field label ! Doing so may suppress any entered data.

Basic Info | Privilege | Demographics | **Addresses** | Extended Info | Outreach | User groups

Primary: Address 1 Address 2

Address 1

GUARDIAN

LINE1 200 MAIN ST APT C

LINE2

LINE3

CITY/STATE ANYWHERE OH

POSTALCODE 99999

EMAIL feedAbook@myemail.com

PRIMARYPHO

SECONDPHO

ALTPHONE

Address 2

LINE1

LINE2

LINE3

CITY/STATE

POSTALCODE

SMS 7405550000@sms.oplin.org

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

1. Enter the needed information.
2. Use United States Postal Service address guidelines.
3. Use the format of CITY and STATE ABBREVIATION with no punctuation. Examples:
CALDWELL OH TIFFIN OH
4. Email– If your patron wants to be notified via email, enter their email address in the email field in the Address 1 section.
5. Text notices– If your patron wants to receive their notices by text, enter their cell phone number in the SMS field in the Address 2 box. You must enter the phone number and the OPLIN format. Example: 7405550740@sms.oplin.org Notify by SMS must be chosen on the demographics tab.
6. Email AND Text messages– enter their email in Address 1. Enter their cell phone number and the OPLIN format in the SMS field. Example: 7405550000@sms.oplin.org

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G. Extended Info Tab-

The screenshot shows a web interface for user registration. The 'Extended Info' tab is active. It contains a list of dropdown menus, each with a corresponding text input field. The dropdown menus are labeled: EMPLOYER, INTERNET, NOTE, COMMENT, REFERENCE, STAFF, PREV_ID, and PREV_ID2. Below these is a field for ACTIVEID with the value 12345678912345, and a field for INACTVID.



**Do not use the drop down fields to change any fields on this screen !
Doing so may suppress any entered data.**

1. **Notes** and **Comments** will not show on a patron's record on the OPAC. But please watch how you word or phrase any notes or comments. You never know when a user may accidentally see a staff screen or printed user information.
2. **Click Save to create the user record.**