Learn how to create a patron account and find information about the basic user data fields.

Create a patron account

If your library uses basic (local) authentication, you have the ability to create new patron accounts through the WorldShare Admin interface.

**Note:** This feature is not supported for libraries using third-party authentication. Libraries using LDAP, SAML/Shibboleth, CAS or another third-party provider must perform ongoing patron loads in order to add new patron accounts to Tipasa.

Required fields may vary, depending on the services your library subscribes to. Additionally, if you are using a third-party authentication system, you will not see the Identity Management section.

Follow the account naming conventions used by your institution when creating user names. If you are creating accounts for your staff members, make sure you tell them their user name soon after you create the account. They will need their user name to create a password.

To create a patron account:

1. Click the **Admin** tab.
2. On the left navigation, under User Management, click **New User**.
3. On the Basic User Data panel, OCLC recommends filling in the following fields:
   - Some libraries have additional required fields (those with Circulation functionality and others):
     - **First Name:** Highly recommended.
     - **Address, Phone Number, or Email Address:** Email is highly recommended. The patron needs an email address to create a password for their account.
     - **User Name (or Barcode):** Required. If you cannot edit or do not see the User Name field, type in the Barcode field.
     - **Home Branch:** Required for some. Select the user's preferred branch from the list.
     - **Patron Type:** Required for some. Select the patron type from the list.
4. Click **Create**.
5. On the confirmation window, click **OK**. The patron account appears.
6. To prompt the patron to set a password for their account, click **Set/reset** in the Identity Management section, if available, or direct the patron to go to your library's WorldShare URL and click **Set/reset password** on the Sign In screen.
Basic User Data fields

Libraries using basic authentication can create patron and staff accounts in WorldShare Admin. These fields that appear in the Basic User Data section, which can be filled out when creating or editing a patron account. Fields marked with an asterisk (*) are required.

Personal Information

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>Name prefix of the user (e.g. Ms., Dr., Sir)</td>
</tr>
<tr>
<td>First Name</td>
<td>First name or forename of the user</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Middle name of the user</td>
</tr>
<tr>
<td>Last Name</td>
<td>Last name or surname of the user</td>
</tr>
<tr>
<td>Suffix</td>
<td>Name suffix of the user (e.g. M.A., Esq., Jr.)</td>
</tr>
<tr>
<td>Allow patron to edit the name</td>
<td>Select the Allow patron to edit name check box if you want to allow the patron to have the ability to edit their name in My Account.</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>Date of birth of the user. You can enter the date manually, or click the calendar button to select a date.</td>
</tr>
<tr>
<td>Gender</td>
<td>Biological sex (male or female) of the user</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>The date on which the access to certain OCLC-provided services expires. If no date is provided, the expiration date will be set to 60 months (five years) by default.</td>
</tr>
<tr>
<td>Photo URL</td>
<td>If you want an photo to appear in the user's account, enter the URL of an image. The URL must be on a secure site (URL must start with https). The photo is not stored in the system.</td>
</tr>
</tbody>
</table>

Library Record
### Address

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Delete</td>
<td>Click the Add button (+) or Remove button (-) to the right of the Type field to respectively add another address or delete the address.</td>
</tr>
<tr>
<td>Address 1</td>
<td>The first line in the user's address</td>
</tr>
<tr>
<td>Address 2</td>
<td>The second line in the user's address</td>
</tr>
<tr>
<td>City</td>
<td>City of the user's address</td>
</tr>
<tr>
<td>Country</td>
<td>Select from the list the user's country.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Postal code (e.g. zip code) of the user's address</td>
</tr>
<tr>
<td>State/Province</td>
<td>State or province of the user's address</td>
</tr>
<tr>
<td>Type</td>
<td>Select from the list the type of address (Home, Work, or Other). Select the Primary radio button if the address is the user's primary address.</td>
</tr>
<tr>
<td></td>
<td>Select the Invalid check box if the address is no longer valid.</td>
</tr>
</tbody>
</table>

### Telephone

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Delete</td>
<td>Click the Add button (+) or Remove button (-) to the right of the Type field to respectively add another phone number or delete the phone number.</td>
</tr>
<tr>
<td>Number</td>
<td>Phone number of the user</td>
</tr>
<tr>
<td>Type</td>
<td>Select from the list the type of phone number (Home, Work, Office, or Other).</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Resource_Sharing/Tipasa/Patron_management/Create_patron_accounts
Printed: Fri, 10 Sep 2021 08:42:37 GMT
Select the **Primary** radio button if the phone number is the user's primary number.

Select the **Invalid** check box if the phone number is no longer valid.

### Email

The user must have an email address entered in order to set or reset a password.

For setting and resetting passwords:

- The user must have a valid email address entered in either the Delivery Notification or Library Record section of the user record to set or reset a password.
- If an email address is entered in the Delivery Notification section of the user record, this email address is used for the setting and resetting of a password for a user account. If there is no Email entry in the Delivery Notification section, the email entered in the Library Record is used.

For WorldShare Circulation notifications:

- If an email address is entered in the Delivery Notification section of the user record and the **Use patron-supplied email for notifications** is enabled in the relevant **Patron Type Policy**, the Delivery Notification email address is used for Circulation notifications. Otherwise, the Email under Library Record is used for WorldShare Circulation notifications.

### FIELD DESCRIPTION

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Delete</td>
<td>Click the <strong>Add button</strong> (➕) or <strong>Remove button</strong> (➖) to the right of the Type field to respectively add another email address or delete the email address.</td>
</tr>
<tr>
<td>Address</td>
<td>Email address of the user</td>
</tr>
<tr>
<td>Type</td>
<td>Select from the list the <strong>type of email address</strong> (Home, Work, Office, or Other). Select the <strong>Primary</strong> radio button if the email address is the user's email. Select the <strong>Invalid</strong> check box if the email address is no longer valid.</td>
</tr>
</tbody>
</table>
**Circulation**

If you do not use WorldShare Circulation, you are not required to fill out the fields in this section. Fields marked with an asterisk (*) are only required if you use WorldShare Circulation.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode*</td>
<td>Follow your library's procedures for barcode assignment. If you enter a duplicate barcode, you will get an error message when you try to save the record. Depending on your institution's configuration, Barcode and User Name may be linked.</td>
</tr>
<tr>
<td>Blocked</td>
<td>Blocked users have their circulation privileges suspended. Select the check box to block the user. You can create a staff note to indicate the reason for the block. See Add notes about a user for details. If you have circulation policies set up in OCLC Service Configuration, the system will automatically prohibit patrons from performing circulation functions like checking out items and placing holds based on the limits you set for certain policies. Selecting the Blocked? check box manually blocks a patron. System blocks do not cause this option to be selected.</td>
</tr>
<tr>
<td>Collection Exempt</td>
<td>Select the check box to exempt the user from debt collection (the user is exempt from having their account information sent to a collection agency).</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>The Circulation Expiration Date determines when circulation privileges expire. The patron's circulation privileges will expire on the date entered at 11:59:59 PM. Set the Expiration Date based on your library's policies. This is not the same as the Identify Management Expiration Date field (see below), which determines when system access ends.</td>
</tr>
<tr>
<td>Home Branch*</td>
<td>Select the user's preferred branch from the list. The home branch selected here will be the default pickup location when placing a hold for the user.</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Resource_Sharing/Tipasa/Patron_management/Create_patron_accounts

Printed: Fri, 10 Sep 2021 08:42:37 GMT
### FIELD DESCRIPTION

**The home branch may also be used in Location Policy, which is set in OCLC Service Configuration (WMS Circulation > Location Policy). For more information, see Location Policy.**

**The ID Verified? check box indicates the user has shown a form of identification that is required when creating an account. The check box is selected automatically. Deselect the check box to mark the user as unverified.**

**Whether a user is verified or unverified may have an effect on their loan limits and hold limits based on what you set in OCLC Service Configuration (WMS Circulation > Loan Limit Policy or Hold Limit Policy). For more information, see Loan Limit Policy and Hold Limit Policy.**

**Select a Patron Type from the list.**

**Patron Type Policies are created in OCLC Service Configuration (WMS Circulation > Patron Type Policy). For information on creating Patron Type Policies, see Patron Type Policy.**

**Date the user is registered in the system**

### Interlibrary Loan

**Approved?** Select the Approved? check box if the patron has been approved for interlibrary loan requests. If you do not have patron approval turned on, you are not required to approve patrons.

**Blocked?** Select the Blocked? check box to block the patron from placing interlibrary loan requests.
Note: If you use, this is not the same as a patron being prohibited from performing circulation functions in the system because of the circulation policies you have set up in Service Configuration.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifier</td>
<td>The patron’s interlibrary loan identifier.</td>
</tr>
<tr>
<td>Patron Type</td>
<td>The patron’s patron type.</td>
</tr>
<tr>
<td>Pickup Location</td>
<td>The patron’s preferred pickup location.</td>
</tr>
</tbody>
</table>

**Delivery Notification**

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMS Messaging / Telephone Number</td>
<td>The patron’s phone number where they will be receiving SMS notifications about their interlibrary loan requestes. Patrons must select to receive updates by text message in their account in My Account.</td>
</tr>
</tbody>
</table>
| Email Address                      | The email address of the patron where they will receive notifications about their interlibrary loan and circulation requests. For setting and resetting passwords:  
  - The user must have a valid email address entered in either the Delivery Notification or Library Record section of the user record to set or reset a password.  
  - If an email address is entered in the Delivery Notification section of the user record, this email address is used for the setting and resetting of a password for a user account. If there is no Email entry in the Delivery Notification section, the email entered in the Library Record is used. |
| Notifications:                    |             |
• By default, Tipasa users will receive email messages about their request in My Account. If a patron has opted out of receiving email notifications, custom notifications will result in a user opted out message in the Request History and will not be sent to the patron. See My Account for more information.

• This email address will be used to send WorldShare Circulation notifications when the Use patron-supplied email for notifications is enabled in the relevant Patron Type Policy.

Note: WorldShare Circulation does not allow individual patrons to opt out of email notices when the patron has a valid email address on record.

| Send Updates? | The Send Updates? check box will be selected if the patron has opted to receive updates about their interlibrary loan requests through email, SMS, or both. |
| Send Email Updates? | The Send Email Updates? check box will be selected if the patron has opted to receive email updates. Note: Patrons will still receive email notification unless they have opted out in My Account. See Communication preferences for more information. |
| Send SMS Updates? | The Send SMS Updates? check box will be selected if the patron has opted to receive SMS updates. |

Identity Management

If you are using a third-party identity management system, this section will not appear.

<p>| Expiration Date | The Identity Management Expiration Date determines |</p>
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>when system access ends. When the date has passed, the user can no longer sign in to the system. If no date is provided, there will be no expiration date for the account. This is not the same as the Circulation Expiration Date field (see above), which determines when circulation privileges expire.</td>
</tr>
<tr>
<td>Inactive</td>
<td>Inactive users cannot sign in to the system. Select the check box to mark the user as inactive.</td>
</tr>
<tr>
<td>User Name</td>
<td>User name of the user. The User Name is used to sign in to the system. Depending on your institution's configuration, Barcode* and User Name may be linked.</td>
</tr>
</tbody>
</table>