

## User Registration Training Resources Cheat Sheet

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RSA recommends that you review the following documents and videos available at our support site and YouTube channel. This list is a useful primer on RSA's policies and standards regarding User Registration and on how to register users in WorkFlows. These resources should be useful both as a refresher and to be given to new staff at your library.

1. User Cards Policy (2013-12-05):  
[https://support.librariesofrsa.org/project/users/#User\\_Cards](https://support.librariesofrsa.org/project/users/#User_Cards).
2. New Patron Policy (2020-11-12):  
[https://support.librariesofrsa.org/project/users/#New\\_Patron](https://support.librariesofrsa.org/project/users/#New_Patron).
3. Circulation Helpers Guide (2017-11): <https://support.librariesofrsa.org/project/guide-circulation-helpers/>.
4. User Search Helper Guide (2019-09-16):  
[https://support.librariesofrsa.org/project/users/#User\\_Search\\_Helper](https://support.librariesofrsa.org/project/users/#User_Search_Helper).
5. Patron Registration Policy (2019-02-07):  
[https://support.librariesofrsa.org/project/users/#Patron\\_Registration](https://support.librariesofrsa.org/project/users/#Patron_Registration).
6. User Registration Library Name Properties Guide (2018-03):  
[https://support.librariesofrsa.org/project/users/#User\\_Registration\\_Library\\_Name\\_Properties](https://support.librariesofrsa.org/project/users/#User_Registration_Library_Name_Properties).
7. User Registration for Academic Libraries Guide (2018-03):  
[https://support.librariesofrsa.org/project/users/#User\\_Registration\\_for\\_Academic\\_Libraries](https://support.librariesofrsa.org/project/users/#User_Registration_for_Academic_Libraries).
8. User Registration for Public Libraries Guide (2018-03):  
[https://support.librariesofrsa.org/project/users/#User\\_Registration\\_for\\_Public\\_Libraries](https://support.librariesofrsa.org/project/users/#User_Registration_for_Public_Libraries).
9. User Registration for School Libraries Guide (2018-03):  
[https://support.librariesofrsa.org/project/users/#User\\_Registration\\_for\\_School\\_Libraries](https://support.librariesofrsa.org/project/users/#User_Registration_for_School_Libraries).
10. Patron Notes Policy (2012-12):  
[https://support.librariesofrsa.org/project/users/#Patron\\_Notes](https://support.librariesofrsa.org/project/users/#Patron_Notes).
11. Copy/Clone User during User Registration Guide (2017-10):  
[https://support.librariesofrsa.org/project/users/#CopyClone\\_User\\_During\\_User\\_Registration](https://support.librariesofrsa.org/project/users/#CopyClone_User_During_User_Registration).
12. Replacing a Lost User Card Cheat Sheet (2021-09-06):  
[https://support.librariesofrsa.org/project/users/#Replacing\\_a\\_Lost\\_User\\_Card](https://support.librariesofrsa.org/project/users/#Replacing_a_Lost_User_Card).
13. Patron Checkout History Guide (2022-06): <https://support.librariesofrsa.org/wp-content/uploads/2024/01/Check-out-history-guide-2022-06-23.pdf>.

14. Patron Photos in WorkFlows Cheat Sheet (2017-11):  
[https://support.librariesofrsa.org/project/setup-config-backup/#Patron\\_Photos\\_in\\_WorkFlows](https://support.librariesofrsa.org/project/setup-config-backup/#Patron_Photos_in_WorkFlows).
15. Reciprocal Patron Deletion Form: [https://support.librariesofrsa.org/wp-content/uploads/2022/03/Approved\\_Reciprocal\\_Patron\\_Deletion\\_Form.pdf](https://support.librariesofrsa.org/wp-content/uploads/2022/03/Approved_Reciprocal_Patron_Deletion_Form.pdf).
16. Retention Schedule for Expired Patron Cards (2023-08-09):  
[https://support.librariesofrsa.org/project/users/#Retention\\_Schedule\\_for\\_Expired\\_Patron\\_Cards](https://support.librariesofrsa.org/project/users/#Retention_Schedule_for_Expired_Patron_Cards).
17. Patron Expiration Notice Guide (on the [Notices in WorkFlows](#) page):  
[https://support.librariesofrsa.org/project/workflows-notices/#Patron\\_Expiration\\_Notice](https://support.librariesofrsa.org/project/workflows-notices/#Patron_Expiration_Notice).
18. Patron PIN Masking in WorkFlows Cheat Sheet (2019-02-19):  
[https://support.librariesofrsa.org/project/users/#Patron\\_PIN\\_Masking\\_in\\_WorkFlows](https://support.librariesofrsa.org/project/users/#Patron_PIN_Masking_in_WorkFlows).
19. Removing a Blank Note from a User's Account (2017-12):  
[https://support.librariesofrsa.org/project/users/#Removing\\_a\\_Request\\_During\\_Patron\\_Deletion](https://support.librariesofrsa.org/project/users/#Removing_a_Request_During_Patron_Deletion).
20. User Registration for Public Libraries video (2020-06-05, AH):  
<https://www.youtube.com/watch?v=Oc8cEOTba2U>.
21. User registration for School Libraries video (2020-07-28, AH):  
<https://www.youtube.com/watch?v=EJoML4XqN84>.
22. Basic Patron Registration Workshop video (2024-03-26, TH):  
[https://www.youtube.com/watch?v=nXukvx\\_BZes](https://www.youtube.com/watch?v=nXukvx_BZes).
23. How to Copy or Clone a user in WorkFlows (2020-06-12, SN):  
<https://www.youtube.com/watch?v=AwRk0qpxQsl>.