



Basic WorkFlows Patron Registration Workshop Guide DRAFT

Last updated: October 7, 2025

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

https://www.youtube.com/watch?v=nXukvx_BZes

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Workshop Overview

This workshop covers basic skills for patron/user registration in Workflows Circulation+. It does not cover circulation or holds training.

- Review RSA Patron/User Registration documents before you begin
 - [Patron Registration Policy](#)
 - [Patron Cards Policy](#)
- Basic WorkFlows navigation and terms
 - Modules, Groups, Wizards and Helpers
 - Functions within WorkFlows, column sorting & linked (underlined) text
- Walkthrough of Registration
- WorkFlows Wizards

- Display User
 - User Registration
 - Remove User
- WorkFlows Helpers
 - User Search Helper
 - Modify User Helper
- RSACat
 - My Account Page > Personal Information Tab
 - Changing PIN
 - Turning on Checkout History (only to be done by patrons)

Before You Begin

First read the **Patron Registration Policy** and the **Patron Cards Policy** and related Standards and Procedures – all found on the support site and linked above – before beginning patron registration. There is a separate set of standards for school libraries, which is found on the support site in the [Schools Handbook > User Registration for School Libraries Standard](#).

These documents include the RSA-wide standards to format text correctly (like entering things in ALL CAPS and excluding punctuation except for dashes in Last-Names) and which fields are required.

RSA's policy is one card per patron, except for instances denoted in the current policy. Some exceptions include when a patron is paying taxes in multiple RSA library service areas, if they are [a child of multiple households](#), if they are library staff in an area they don't live, or if they have both a teacher/student card and a public library card. If they have a card in the system, but are moving to your area, their card must be in "Good Standing*" before creating the new card and it is the responsibility of the previous library to delete the old card (after being notified by you, the patron's new library.) There is a [form for the deletion of reciprocal patrons found on the RSA Support site](#). See the policy for more distinctions and types of cards including Non-RSA cards and Non-Resident cards.

*Good Standing shall be defined as a patron who has no outstanding bills for lost items, collection fees, processing fees, fees for damage, or miscellaneous services. To be considered in good standing, fines should be below the patron's former library's block limit. If a patron's status is "OK" or "DELINQUENT," and the only fines they owe are simple overdue fines, then for the purposes of RSA policy, they are considered to be in Good Standing.

Public libraries: besides these documents, review your library's local policies for determining whether a patron lives in your library service area before issuing a library card. If they do not live in the service area but want a card, there is info in the above documentation about Non-Resident cards. Each library has a different non-resident fee amount, and you should follow your local policies for accepting payment and tracking those registrations. This map from the IL State Library may be helpful:
https://www.ilsos.gov/departments/library/libraries/library_service_areas.html

Basic WorkFlows Navigation and Terms

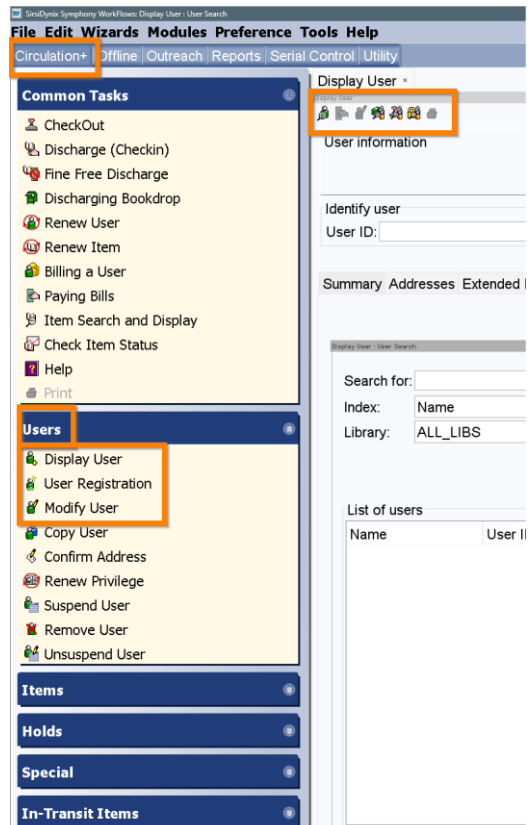
Modules, Groups, Wizards and Helpers

Modules are the highest level of category in WorkFlows, and for most CIRC accounts, you'll only be able to access the following Modules: Circulation+, Offline, Outreach, Reports, Serial Control, and Utility.

Groups contain sets of Wizards and are located along the left-hand side of WorkFlows. In the Circulation Module, Common Tasks, Users, Items, and Holds are examples of Groups. This workshop primarily deals with the Users Group.

Wizards are the tools that you can open in Tabs to do various functions within WorkFlows. Examples of these that we're going to use in this workshop are the Display User, User Registration and Remove User wizards. If you aren't seeing Tabs, see the guide [Turning on Tabbed Windows in WorkFlows](#) to enable that option.

Helpers are small icons at the top-left of an opened Wizard Tab. Examples of Helpers in this workshop include User Search and Modify User. These are conveniently located tools that help you by reaching into the database for a search, edit, or other context-sensitive action.



Functions within WorkFlows

Some linked (underlined) text can be seen in the image below, such as the user's name and the Item ID. Left-clicking this underlined text brings up more information about that thing.

Some useful Tabs in the Display User Wizard include Summary, Addresses, Extended Info, Bills, Checkouts, and Holds. Reveal that information by clicking on the tab. You can set the default tab that opens in this and other Wizards in preferences (Right-click on the Wizard's title on the lefthand side.)

Sorting the contents by column can be done by clicking above the top cell of the column on the column you'd like to sort by. Example: sort by Date Due by clicking on the Date Due column.

The screenshot shows the 'Display User Wizard' interface. At the top, there are tabs for 'Alerts' and 'Notes'. Below this, the user's name 'RIKER, WILLIAM T' is highlighted with an orange box. Other fields include 'Id:', 'Group ID:', and 'Profile name: ADULT-10...'. A section titled 'Identify user' contains a 'User ID' field with the value '094130344'. To the right, contact information is listed: 'Street: 688 N PINE ST', 'City, state: CHICAGO IL 60611', 'Phone: (773) 762-1211', and 'Email: riker.william@gmail.com'. Below this is a row of tabs: 'Summary', 'Addresses', 'Extended Info', 'Bills', 'Checkouts', 'Holds', 'Routings', 'Suspension', 'Charge', 'History', and 'User Groups'. The 'Checkouts' tab is selected and highlighted with an orange box. Below the tabs, it says 'Checkouts: 6 (\$0.00)'. A table of checkouts is displayed with columns: 'Title', 'Call number', 'Item ID', 'Date Charged', 'Date Due', 'Recall Date ...', 'Status', and 'Type'. The table contains five rows of checkout data.

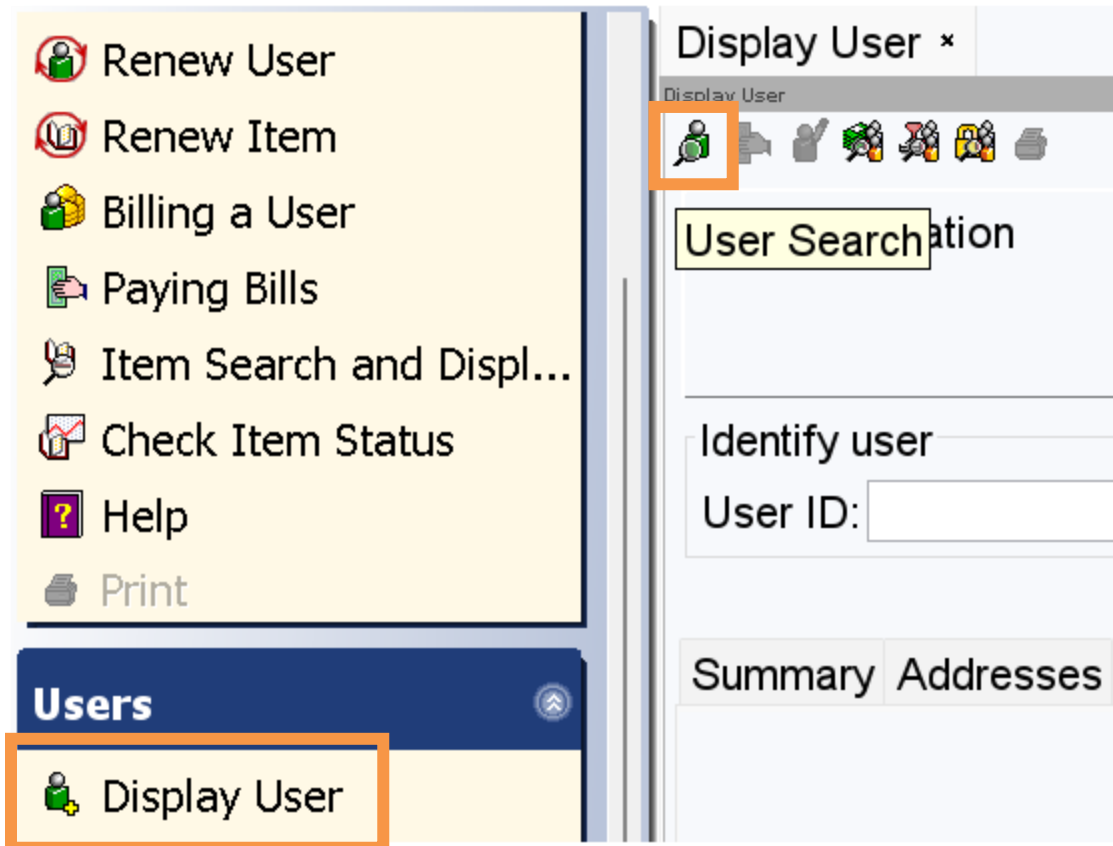
Title	Call number	Item ID	Date Charged	Date Due	Recall Date ...	Status	Type
Oak origins : ...	NFIC 634.97...	A219073253...	3/26/2025,16...	5/27/2025,23...			N-BK-H
Bad law : ten...	NFIC 349.73...	A219073405...	3/26/2025,16...	5/27/2025,23...			N-BK-H
The shorebir...	NFIC 598.33...	A219073400...	3/26/2025,16...	5/27/2025,23...			N-BK-H
Player's hand...	NFIC 793.93...	A219073143...	3/26/2025,16...	5/27/2025,23...			N-BK-H
The art of st...	519.5 SPI	3344100689...	4/19/2025,8:57	5/27/2025,23...			BOOK
The game m...	793.73 EGL	A132217143...	4/19/2025,8:57	5/27/2025,23...			BOOK

Walkthrough of Registration

First turn to the Display User Wizard > User Search helper in order to find out if the user is already in the RSA system.

Display User Wizard > User Search Helper

Without the User Search Helper, the option to Identify a user is by User ID (their barcode)



User Search Helper > Keyword Search and Browse Search

You can use many different limits to search for a user. You may want to use the Name (default) search but then try out Browse Search instead of Keyword search. This will show you names that are close to the name you spelled, so you can see if there's a different spelling of the name you're looking for, perhaps with other similar details.

Search for: RIKER

Index: Name AND OR Type: **Keyword** (highlighted)

Library: ALL_LIBS

List of users

Name	User ID	Alt ID	Phone	Birth Date
RIKER, WILL T	DTESTTONY01		800-887-8800	8/19/1969

If you want to get more information on a user that comes up on the search, either double click or click on their name, then click “Display this User.”

From there you can look at various aspects of the patron’s profile (in the Tabs) to determine if they’re in Good Standing, have fines/fees/bills or have outstanding checkouts that need to be returned first, and at which library they had their previous card -- if so, note that down to contact the library later.

Title	Item ID	Reason	Owes	Billed	Date	Payment library	Note
		COPIES	\$1.00	\$1.00	5/8/2025	WORKSHOP ignore TH	

Pictured above: right clicking a row grants you additional options given the context.

Pictured below: Click the underlined text of the patron’s name to see their home library both under “Library:” and under “User cat1:”. You can also see when the card was registered, when it expires, user’s last activity date, and birthday to compare to what their ID says.

Alerts

Name: RIKER, WILL T
Id: DTESTTONY01
Group ID: ADULT...
Profile name: ADULT...

Identify user

User ID: DTESTTONY01

Summary Addresses Extended

Status is: DELINQUENT
Profile name: ADULT
User cat1: AG_ALS-PDC...
User cat3: AG_ALS-PDC...
User cat5: AG_ALS-PDC...
User cat7: AG_ALS-PDC...
User cat9: AG_ALS-PDC...

User ID: DTESTTONY01
Name: RIKER, WILL T
Profile name: ADULT
Library: AG_ALS-PDC... (highlighted)
Language: ENGLISH

Privilege granted: 5/8/2025
User date created: 5/8/2025
Last activity: 5/8/2025

Privilege expires: 5/8/2028
Checkouts allowed: UNLIMITED

User cat1: AG_ALS-PDC... (highlighted)
User cat2: AG_ALS-PDC...
User cat3: AG_ALS-PDC...
User cat4: AG_ALS-PDC...
User cat5: AG_ALS-PDC...
User cat6: AG_ALS-PDC...
User cat7: AG_ALS-PDC...
User cat8: AG_ALS-PDC...
User cat9: AG_ALS-PDC...
User cat10: AG_ALS-PDC...
User cat11: AG_ALS-PDC...
User cat12: AG_ALS-PDC...
Birth date: 8/19/1969 (highlighted)
Age: 55

Status is: DELINQUENT
Group ID: AG_ALS-PDC...
Group name: AG_ALS-PDC...

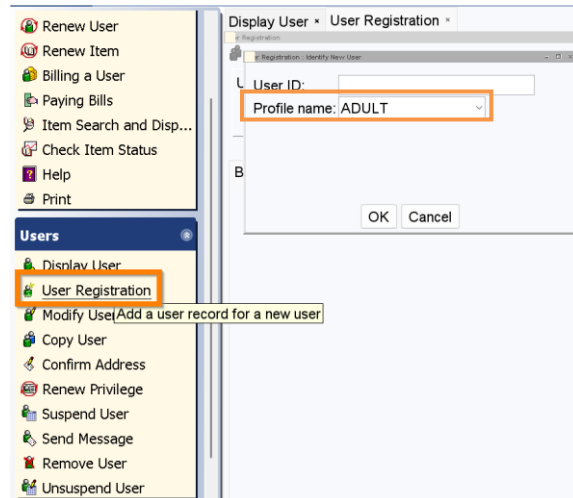
Close

User Registration Wizard

If you don't find an existing user in the system (or if you do, and you've noted down the library the patron is relocating from) we can now open the User Registration Wizard from the Users Group along the left-hand side of the menu.

After ensuring you have the right profile selected under **Profile name:** ensure the cursor is in the **User ID:** box by clicking back into the top box, then scan the barcode on the new library card. You won't change Profile every time, except for when registering JUV cards at Public Libraries, or for other special types of profiles such as S-STAFF / STUDENT for schools.

All users for your library must be entered with your correct [library user barcode prefix](#). For help ordering new barcoded cards, see the [Barcodes page on the RSA Support Site](#).



Registration

Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Basic Info | Privilege | Demographics | Addresses | Extended Info

Title:

First name:

Preferred name: ☒ Use preferred name

Middle name:

Last name:

Suffix:

Alt ID: ☒ Allow routing

Group ID:

Library:

Profile name:

Charge history rule:

Fill in the **First name** and **Last name** in ALL CAPITAL LETTERS and avoid using punctuation besides dashes “-“ in a name.

The **Use preferred name** box must be checked for their **Preferred name** to appear at the top of the profile. Be sure it is checked if they use a name other than their legal name.

Ensure that **Library** is set to your library. If your default for this field isn’t correctly setup as your library, please see the [WorkFlows Supervisor Setup Guide](#).

School Registrations

The **Alt ID** field is for school ID #s. Entering these allow login to a User account just like the use of their library card.

Group ID is a field that can be used to identify a student’s Homeroom.

Next, switch Tabs over to **Privilege**. If you are setting up a new **PIN**, follow your library’s internal procedure for selecting a **PIN**, but please note that if you make any change to **PIN**, you’ll need to add “rsa” (without quotes) as the **Override** code.

Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Basic Info **Privilege** Demographics Addresses Extended Info

Privilege expires: 5/12/2028

PIN: ***** Override:

Status: OK

Claims returned: Override:

Web auth id: Override:

BLUEcloud staff ID: Override:

The default **Privilege expiration** date is 3 years in the future. If Expiration needs to be modified, the diamond shaped Gadget will help you choose a date.

Tab over to **Demographics** next.

Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Basic Info Privilege **Demographics** Addresses Extended Info

User cat1: AG_ALS-PDC 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: 07/17/1950

Language: ENGLISH

User Categories or Demographics are usually a library-specific thing, but there are two required fields on this tab for every *RSA public library*.

1. The first required field is **UserCat1** which should reflect the patron Library Code. You can also set this to automatically fill in the supervisor guide referenced above.
 2. The next required field is **Birth date**. Every public library patron needs this entered to avoid duplicates. *Schools don't need to enter birth date.*
 3. Schools should always enter **User cat 6**, as the year they will graduate high school.
- The rest of the optional User categories are outlined below:

- **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 9,10,11:** left blank
- **User cat 12:** contact RSA to add codes to track specific user statistics

Tab over to **Address** next. (screenshot example on next page)

In these fields, try to fill out the form completely using ALL CAPITAL LETTERS. For the **PHONE**, do NOT use parenthesis. Just use dash - marks – between numbers ex. 309-888-5555. Asking for emails is the best practice here, so that patrons will get automated notifications from your library. *School libraries with elementary students often don't check email, but if you enter it here, then it will be there when they get to higher grades.*

Leave off punctuation from this form, too. Ex. 1701 ENTERPRISE AVE
PEORIA IL 61616

EMAIL is their email address, and capitalization doesn't matter here. Just enter the email they give you with correct punctuation. You can add multiple emails that will each get a copy of the email by separating them with a comma “,”

Display User * User Registration *

Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Basic Info Privilege Demographics **Addresses** Extended Info

Primary: ☒ Address 1 ☐ Address 2 ☐ Address 3

Address 1

PHONE	888-123-4568
DAYPHONE	
STREET	1501 ENTERPRISE AVE
CITY/STATE	TREKSVILLE IL
ZIP	61611
EMAIL	imadoctorjim@space.net, callmebones@warpcore.com
CARE/OF	

Address 2

CARE/OF	
TYPE	
USEFOR	
STREET	
CITY/STATE	
ZIP	
WORKPHONE	
DAYPHONE	

Save **Check Duplicate User** Register Another User Close

Primary radio buttons - select which field to use, be sure the whole address is filled out. If Address 2 is selected but you are missing an email from that field, then the User will not get emails. So, fill each Address out completely if you decide to use Address 2

Display User • User Registration •

Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Basic Info Privilege Demographics Addresses **Extended Info**

NOTE
COMMENT
LOSTITEM
STAFF
INACTVID
ACTIVEID
PREV_ID
PREV_ID2
ALRT_POPUP

Save **Check Duplicate User** Register Another User Close

The **Extended Info** Tab 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 name or initials, date, and library. For additional info on correct use of notes, see the [RSA Patron Notes Policy](#).

At the bottom, **Check Duplicate User** is required next, to ensure there aren't any obvious dupes in the system. It will not let you save until you press this button.

A screen like this pops up...

The image shows a 'User Registration - User Search' dialog box. It contains search criteria for email (EMA) and USNM, with fields for Name, Index, and Library. A 'Search' button is present. A 'List of users' table is at the bottom with columns for Name, User ID, Alt ID, Phone, and Birth Date. A 'Cancel' button is at the bottom right. A smaller 'User Registration - Warning' dialog box is overlaid in the center, displaying a yellow warning triangle and the text 'No duplicate users found' with an 'OK' button.

If there aren't duplicates, just press **OK**, then click **Save** once you return. If you see dupes, (sometimes they have a similar email/address/name) then just try to confirm they are not the same person before saving.

A row of four buttons: 'Save' (highlighted with an orange border), 'Check Duplicate User', 'Register Another User', and 'Close'.

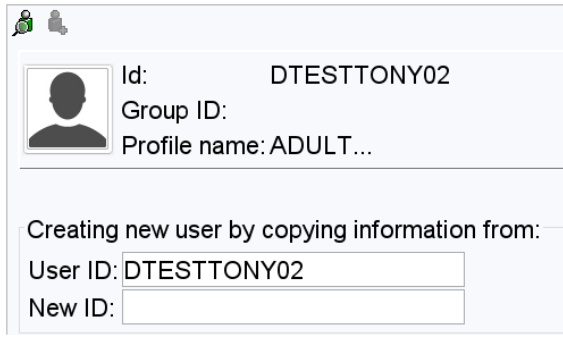
You're done! However, if you are registering more than one User today and they are from the same household, see the next section on **Clone/Copy to New User**.

The image shows a 'Complete' dialog box with a title bar containing a 'WF' icon and a close button. The text inside reads 'MCCOY, BONES is registered'. Below this are four buttons: 'Register Another User', 'Make More Changes', 'Clone/Copy to New User' (highlighted with an orange border), and 'Close' (highlighted with a dashed blue border).

Clone/Copy to New User

This keeps the same last name and address fields filled in to save time when registering members of a family or household.

You will see an interface like this where you can enter the next Users **New ID** barcode in the second box.



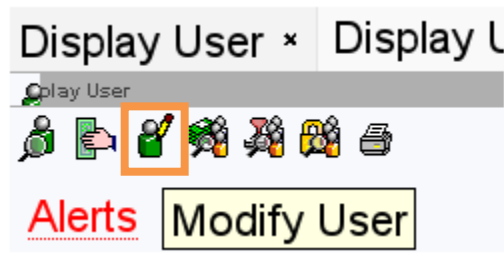
Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Creating new user by copying information from:
User ID: DTESTTONY02
New ID:

Then, continue through the same User Registration Wizard steps above, Check for Duplicates, and Save.

Modify User Helper

The Modify User Helper is for when you need to make changes to an existing user. The fields are identical to the User Registration Wizard within this helper.



You can also Modify User if you need to change a library card in case of a lost / replaced card. Enter the new Barcode into User ID and overwrite the old number there. The old card will be disabled if it's no longer on their record.

Alerts Notes

Name: RIKER, WILL T
Id: DTESTTONY02
Group ID:
Profile name: ADULT...

Identify User

User ID: DTESTTONY02

Phone: 800-887-8800
Street: 25 CENTURY LN
Zip: 61611
Email: whoisonathanfrakes@spacemail.com

Basic Info Privilege Demographics Addresses Extended Info

Title:

First name: WILLIAM

Preferred name: WILL ☒ Use preferred name

Middle name: T

Last name: RIKER

Office:

User ID: DTESTTONY03

Alt ID:

Group ID:

Library: AG_ALS-PDC

Profile name: ADULT

Charge history rule: NOHISTORY

☒ Allow routing

Save (o) Cancel

RSAcat

Find your library's RSCat page here: [RSAct Search and Links | RSA Support](#)

- My Account Page: click My Account at the top. Enter Barcode + Pin when asked.

Welcome MCCOY, BONES | Log Out | My Account | My Lists | Library Information | Select Language | ?

Cambridge Public Library

RSAct
Libraries Delivered

Cambridge Public Library C All Fields Search Advanced Search

Personal Information Checkouts Holds Fines

MCCOY, BONES

Contact Information

Display name: MCCOY, BONES
Barcode: DTESTTONY03
Library: CMBRIDGE
Circrecordcount: 0
Date privileges expire: March 14, 2027

Address 1

Care of:
City, state: CAMBRIDGE IL
Daytime phone:
Email: tony.hahn@rallslibraries.org
Phone: 555-888-7777
Street: 1701 ENTERPRISE LN
Zip: 65504

Your status: Your account is in good standing.

Checkouts

Digital: 0
Library: 0

Holds

Digital: 1
Library: 1

Fines

Total due: \$0.00

Users can see their checkouts in the Checkouts Tab, Manage Holds from the Holds Tab, and some libraries allow payment of fines via credit/debit card from the Fines tab. The minimum payment is \$1.00 for online bill pay.

My Account > Personal Information Tab features:

- Change PIN by entering the Current PIN, and New PIN twice. Click Update.
Screenshot below:

Welcome MCCOY, BONES | [Log Out](#) | [My Account](#) | [My Lists](#) | [Library Information](#) | [Select Language](#) | [?](#)

Cambridge Public Library

RSAcat
Libraries Delivered

Cambridge Public Library C All Fields Search Advanced Search

Personal Information Checkouts Holds Fines

MCCOY, BONES

Change PIN

Current PIN:

New PIN:

Confirm New PIN:

Update

Preferences

Your status: Your account is in good standing.

Checkouts

Digital:	0
Library:	0

Holds

Digital:	0
Library:	1

Fines

Total due:	\$0.00
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- Turning on Checkout History (only to be done by patrons) is in Preferences. See the [Patron Checkout History guide](#) for more info.

Welcome MCCOY, BONES | [Log Out](#) | [My Account](#) | [My Lists](#) | [Library Information](#) | [Select Language](#) | [?](#)

Cambridge Public Library

RSAcat
Libraries Delivered

Cambridge Public Library C All Fields Search Advanced Search

Personal Information Checkouts Holds Fines

MCCOY, BONES

Change PIN

Preferences

Default My Account Tab:

Default Checkouts View:

Default Holds View:

Preferred List:

Preferred Pickup Library:

☒ Record my checkout history

☒ Show my checkout history

Update

Your status: Your account is in good standing.

Checkouts

Digital:	0
Library:	0

Holds

Digital:	0
Library:	1

Fines

Total due:	\$0.00
------------	--------

- Changing Preferred Pickup Library is also possible from here.

- Some libraries may also allow email to be changed with an **Edit** button at the top of the first section in the Personal Information Tab.

Back in WorkFlows:

Remove User Wizard

Manually delete any test users you have created during this workshop.

Common Tasks

- CheckOut
- Discharge (Checkin)
- Fine Free Discharge
- Discharging Bookdrop
- Renew User
- Renew Item
- Billing a User
- Paying Bills
- Item Search and Disp...
- Check Item Status
- Help
- Print

Users

- Display User
- User Registration
- Modify User
- Copy User
- Confirm Address
- Renew Privilege
- Suspend User
- Remove User**

Items

Remove User

Remove User: Removing User

Identify User

User ID: Current: RIKER, WILL T DTESTTONY01

Get User Information Remove Remove Another User Close

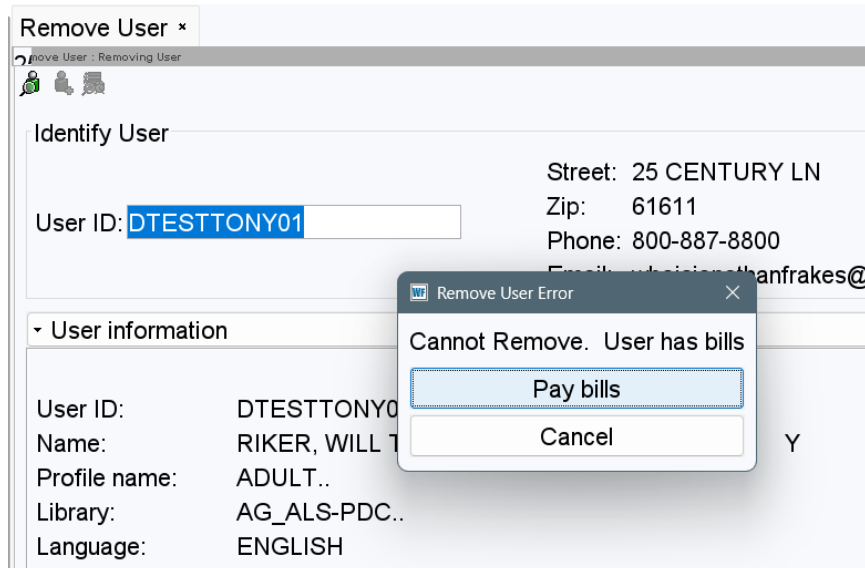
You'll remove a User account manually if another library requests that you do, or if you are cleaning up expired users. The policy [Retention Schedule of Expired Patron Cards can be found on the RSA Support Site](#).

Access the **Remove User Wizard** from Users Group along the left.

Scan or enter the User ID under **Identify user**.

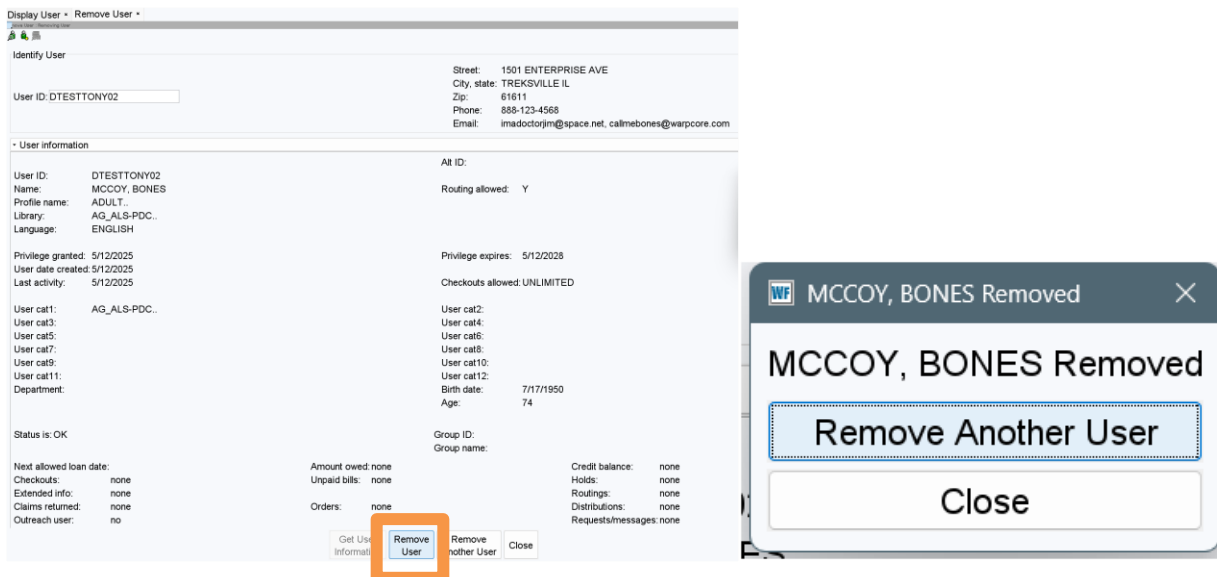
Click **Remove User** at the bottom of the screen.

If the user still has bills, you will get the following message:



If this happens, click on **Pay bills**. There is a guide on [how to pay bills on the RSA Support site here](#).

Try **Remove User** again after resolving any billing issues.



You will get the above message as confirmation that the user was removed.

Patron Registration Training Resources

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. Patron Registration Policy (2024-06-04):
https://support.librariesofrsa.org/project/users/#Patron_Registration.
2. Patron Cards Policy (2024-08-01):
https://support.librariesofrsa.org/project/users/#Patron_Cards.
3. Circulation Helpers Guide (2017-11): <https://support.librariesofrsa.org/project/guide-circulation-helpers/>.
4. User Profiles Guide (2025-09-12):
https://support.librariesofrsa.org/project/users/#User_Profiles_Guide.
5. User Registration for Public, Academic, and Special Libraries Standard (2025-10-01):
https://support.librariesofrsa.org/project/users/#User_Registration_for_Public_Academic_and_Special_Libraries.
6. User Registration for Public Libraries Guide (2025-10-01):
https://support.librariesofrsa.org/project/users/#User_Registration_for_Public_Libraries.
7. User Registration for Academic Libraries Guide (2018-03):
https://support.librariesofrsa.org/project/users/#User_Registration_for_Academic_Libraries.
8. User Registration for School Libraries Standard (2024-09-09):
https://support.librariesofrsa.org/handbook/school-handbook/#User_Registration_for_School_Libraries_Standard.
9. User Registration for School Libraries Guide (2024-09-09):
https://support.librariesofrsa.org/handbook/school-handbook/#User_Registration_for_School_Libraries_Guide.
10. Patron Notes Policy (2025-01-09):
https://support.librariesofrsa.org/project/users/#Patron_Notes.
11. Clone/Copy User Helper Cheat Sheet (2025-10-01):
https://support.librariesofrsa.org/project/users/#CloneCopy_User_Helper.
12. Replacing a Lost User Card Cheat Sheet (2024-08-16):
https://support.librariesofrsa.org/project/users/#Replacing_a_Lost_User_Card.
13. Patron Checkout History Guide (2022-06):
https://support.librariesofrsa.org/project/users/#Patron_Checkout_History.
14. Duplicate User Deletion Form: https://support.librariesofrsa.org/project/duplicate-user-deletion/#Duplicate_User_Deletion_Form_and_Guide.
15. Retention Schedule for Expired Patron Cards Policy (2023-08-09):
https://support.librariesofrsa.org/project/users/#Retention_Schedule_for_Expired_Patron_Cards.

16. User Registration for Public Libraries video (2020-06-05, AH):
<https://www.youtube.com/watch?v=Oc8cEOTba2U>.
17. User registration for School Libraries video (2020-07-28, AH):
<https://www.youtube.com/watch?v=EJoML4XqN84>.
18. Basic Patron Registration Workshop video (2024-03-26, TH):
https://www.youtube.com/watch?v=nXukvx_BZes.
19. How to Copy or Clone a user in WorkFlows (2020-06-12, SN):
<https://www.youtube.com/watch?v=AwRk0qpxQsl>.