

Holdings 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 Holds and on how to manage holds in WorkFlows. These resources should be useful both as a refresher and to be given to new staff at your library. While most of these resources are held on the [Holds page](#) of the support site some are also held on the [Discharge Items](#) and [Resource Sharing](#) pages.

Found on the Holds Page: <https://support.librariesofrsa.org/project/holds/>

1. Reciprocity Policy (2022-05-13):
https://support.librariesofrsa.org/project/holds/#RSA_Reciprocity.
2. Place Hold Wizard Helpers Guide (2017-07):
https://support.librariesofrsa.org/project/holds/#Place_Hold_Wizard_Helpers.
3. Placing Copy Level Holds Cheat Sheet (2017-07):
https://support.librariesofrsa.org/project/holds/#Placing_Copy_Level_Holds.
4. Placing Title Level Holds Cheat Sheet (2017-07):
https://support.librariesofrsa.org/project/holds/#Placing_Title_Level_Holds.
5. Sending and Receiving Items Cheat Sheet (2017-07):
https://support.librariesofrsa.org/project/holds/#Sending_and_Receiving_Items.
6. Placing Book Club/Classroom or Research Holds Guide (2017- 07) and Cheat Sheet (2017-07):
https://support.librariesofrsa.org/project/holds/#Placing_Book_ClubClassroom_or_Research_Holds_Cheat_Sheet_and_Guide.
7. Placing Book Club and Classroom Holds Video (6:30) (2020-04-16):
<https://www.youtube.com/watch?v=7fK3qPcgH0Q>.
8. Placing Research Holds Video (6:15) (2020-04-16):
<https://www.youtube.com/watch?v=ylmeJy0u1Sl>.
9. How Holds Work Guide (2017-07):
https://support.librariesofrsa.org/project/holds/#How_Holds_Work.
10. Important Things about Holds Guide (2017-07):
https://support.librariesofrsa.org/project/holds/#Important_Things_About_Holds.
11. OnShelf Items Wizard Cheat Sheet (2024-01-23):
https://support.librariesofrsa.org/project/holds/#Onshelf_Items_Wizard, and Video (3:48) (2020-06-12): <https://www.youtube.com/watch?v=fY3DQ0Kv6xY>.
12. When Items are Unavailable to Fill Hold or Picklist Request Guide (2017-07):
https://support.librariesofrsa.org/project/holds/#When_Items_are_Unavailable_to_Fill_Hold_or_Picklist_Request.

13. Clean Hold Shelf Report Cheat Sheet (2017-07):
https://support.librariesofrsa.org/project/holds/#Clean_Hold_Shelf_Report.
14. In Transit Policy (2021-09-01):
https://support.librariesofrsa.org/project/holds/#In_Transit_Items.
15. Holds Block Override Popup Box Cheat Sheet:
https://support.librariesofrsa.org/project/holds/#Holds_Block_Override_Popup_Box.
16. Item Search and Display Video (8:04) (2021-08-06):
<https://www.youtube.com/watch?v=86DD0DxXcQk>.

Found on the Discharge Items Page: <https://support.librariesofrsa.org/project/discharge-items/>

17. Discharge Transit Popup Box Guide (2017-07):
https://support.librariesofrsa.org/project/discharge-items/#Discharge_Item_Transit_Popup_Box.

Found on the Resource Sharing page: <https://support.librariesofrsa.org/project/ill-resource-sharing/>.

18. RSA Membership List with Delivery Codes: https://support.librariesofrsa.org/wp-content/uploads/2024/03/RSA_Library_Delivery_Codes-2024-03-29.pdf.
19. RAILS Delivery Codes and Labeling Procedure (2022-08-01):
<https://support.librariesofrsa.org/wp-content/uploads/2023/05/new-delivery-codes-22-07-28.pdf>.
20. Items Requested by a Non-RSA Library Procedure (2024-03-19):
https://support.librariesofrsa.org/project/ill-resource-sharing/#Items_Requested_by_a_Non-RSA_Library.
21. Create and Delete a Temporary Record for a Non-RSA Interlibrary Loan Item Procedure (2024-03-13): https://support.librariesofrsa.org/project/ill-resource-sharing/#Create_and_Delete_a_temporary_record_for_a_Non-RSA_Interlibrary_Loan_Item.