RSA Documentation for Member Libraries

Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
About RSA							
Directors and Admin Handbook							
Training Policy Update							2019-12-09
			RAILS / RSA What are the Differences?				2024-03-19
			Illinois Library System Act				??
			RSA Contact List				2024-03-04
				Terms Used in Policies			2024-03-08
Governance and Admin							
RSA NFP Bylaws*							2018-02-01
		RSA Member Library Responsibilities					2016-07-12
			Defining Policies, Standards, Procedures, and more				2021-10-27
			Functionality by Membership Level Detail				2023-10-26
				Functionality by Membership Level Overview			2023-10-26
			Implications of an RSA Member Library Withdrawing OCLC Membership				2024-03-26
Member Libraries							
		New RAILS Delivery Codes and Labeling					2022-08-01
			RSA Membership Regions and Members by Region				2024-03-01
						RSA Library Delivery Codes	2024-04-29

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
Operations Department Documents							
Barcodes and Equipment							
			Mod 10 Calculation				2024-02-14
			Ordering and Re-Using Barcodes				2024-01-19
Billing (links to Billing landing page)							
Fine Block Limits							2024-05-09
Notifications and Billing for Transited RSA Member Library Items							2019-11-22
			Adding a Bill and Bill Note Before Removing a Lost Item from the RSA Database				2024-04-09
			Bill Notes				2024-04-09
				Billing a User			2024-04-09
				Billing Training Resources			2024-04-26
					Paying a Bill in WorkFlows or Online (7:25)		2021-05-04
Billing Parameters (links to Billing Parameters page)							
						Bill Reasons *	Monthly
						Default Prices and Processing Fees *	Monthly
						Payment Types	2023-12-12
Blue Cloud Analytics (BCA)							
Blue Cloud PII Library Agreement							2024-03-21
Blue Cloud PII Staff Agreement							2024-03-21
			BC Analytics – Exploring Data with Excel				2016-09-14

Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
			BC Analytics - Save and Save AS vs Create Personal View				2016-08-25
				BLUEcloud Analytics: Creating a Personal View			2021-04
					BLUEcloud Analytics Creating a Personal View (5:23)		2021-04-22
			BLUEcloud Analytics (BCA) for Analyst Users				2016-10-04
			Instructions for Subscribing to Reports via Email in BCA				2016-07-25
				BLUEcloud Analytics: Logging In			2021-04
					Blue Cloud Analytics: Logging In (3:25)		2021-04-22
				BLUEcloud Analytics: Running a Report			2021-04
					BLUEcloud Analytics: Running a Report (4:28)		2021-04-22
				BCA – WorkFlows Terminology			2016-12-12
Circulation Handbook							
Circulation Topic Overview							
Adding Brief Title Helper							
			Adding Brief Title Helper				2017-06-12
Checkout							
				Display an Alert for Previous Loan			2024-03-06
					Checking out an Item (3:20)		2021-05-04
Circulation Helpers in WorkFlows							
			Circulation Helpers				2017-11
Circulation Overview							
					Basic Circulation Workshop (42:15)		2023-01-11

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
					RSA WorkFlows Circulation Overview (46:15)		2020-08-31
Circulation Quick Reference Guide (WorkFlows)							
			WorkFlows Circulation Quick Reference				2022-05
Create and Delete a Temporary Record for a Non-RSA Interlibrary Loan Item							
		Create and Delete a Temporary Record for Non-RSA Interlibrary Loan Item					2024-05-10
Discharge Items (links to Discharge Item page)							
			Back Dating Returns Using "Discharging Bookdrop"				2024-01-24
				Discharging Items			2017-11
				Discharge Item Transit Popup Box			2017-07
					Returning Materials (3 Wizards) (8:04)		2021-08-06
Email Receipt Buttons							
				Email Receipt Buttons			2017-12
Fine Fee Recommendations							
			Recommendations and Considerations for Fine Free Libraries				2020-07-27
Item Renewal							
Item Renewal & Hold Shelf Limits							2024-02-09
		Item Renewal & Hold Shelf Limits					2024-02-09
				Renewing Items			2017-12
				To-Date Checkouts and Renewals			2020-01-08
					Basic WorkFlows Renewals (4:36)		2021-08-06
Item Search Helper							
			Item Search Helper				2019-03

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
Keyboard Shortcuts							
??				Function Keys and Keyboard Shortcuts for the Circulation Module			
Lost, Missing, Damaged and LOSTTRANS Items							
Receipt of Damaged Material							2019-11-07
				Adding a Note about Item Damage			2019-07-09
			Mark Item Lost Wizard				2024-03-13
			Mark Item Missing Wizard				2023-10-25
				Processing Found LOSTTRANS Items			2018-03-07
					Lost-No-ID (1:25)		2024-04-09
Mark Item Used Wizard							
			Mark Item Used				2015-03-25
Patron Checkout History							
			Checkout History				2022-06
				Printing Charge History From RSAcat			2024-02-15
Popular Reports for Circ Managers and Where to Locate Them							
				Most Popular Reports for Circ Managers and Where to Locate them in BCA			2023-08-25
Special Due Date Helpers							
			Special Due Date Helpers				2013-03
					Special Due Date Helpers (3:25)		2021-04-05
Circulation Parameters							
						Expanded Circ Map*	Monthly
						Circ Rule Helper Checklist*	??
						Circ Rule Helper Checklist - Printable*	??

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
Die Cut Shapes							
				Die Cut Shapes Collection			2024-03-21
				Die Shape Collection List			2023-10-02
Ebooks, Apps, and Marketing							
			RSA ShoutBomb Brochure				2022-03
CloudSource OA							
			Accessing Online Articles (aka CloudourceOA) in RSAcat				2022-07-29
			Advanced Searching in Online Articles (CloudSourceOA) Search Tab				2022-08-31
				CloudSourceOA FAQ for Library Staff			2022-06-30
Emails and E-newsletter							
				Changing Recovery Emails and Phone Number in RSA Gmail account			2022-11-19
				How to Login to Your Library's Gmail Account			??
				RSA Gmail Fact Sheet			??
Holds (links to Holds Landing Page)							
Clean Holds Shelf List							2021-09-01
				Clean Hold Shelf Report			2017-07
				NEWHOLDS Current Location			2022-05-13
In-transit Items							2021-08-05

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
				Sending and Receiving Items			2017-07
Printed Documents including PII							2021-09-01
Reciprocity							2024-05-09
		Items Requested by a Non-RSA Library					2024-03-19
		New RAILS Delivery Codes and Labeling					2022-08-01
			Holds and Inter-library Loans in the System				2011-05-06
			How Holds Work				2017-08
			How Picklists Work				2021-04
			Important Things about Holds				2017-07
				Hold Shows Available but Hasn't Transited to Pickup Library			2024-04-26
					Basic Holds Workshop (58:40)		2021-07-22
			Place Hold Wizard Helpers				2017-07
					Placing Holds (6:53)		2021-04-13
			Placing Book Club/ Classroom/ Research Holds				2017-07
				Placing Book Club/Classroom or Research Holds			2017-07
					Placing Book Club and Classroom Holds in WorkFlows (6:30)		2020-04-16
					Place Research Holds (6:15)		2020-04-16
			Setting Up and Using a NO-TRANSIT Account				2020-10-29
			Special Locations (Reshelving and No-Transit)				2020-10-29

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
				Onshelf Items Wizard			2024-01-23
					WorkFlows Onshelf Items Wizard (3:48)		2020-06-12
				Holds Block Override Popup Box			2017-07
				Looking up the Pick List on Gmail & Trapping Holds			2008-09
				Placing Copy Level Holds			2017-07
				Placing Title Level Holds			2017-07
				Sorting the Onshelf Items List			??
				When Items are Unavailable to Fill Hold or Picklist Request			2017-07
				Holds Training Resources			2024-04-26
					Basic Item Search and Display (8:04)		2021-08-06
Holds Parameters (links to Holds Parameters Page)							
						Hold Map	Monthly
						Hold Rule Helper Checklist*	??
						Hold Rule Helper Checklist - Printable*	??
						Membership and Holds Groupings	2022-09-20
Interlibrary Loan, Union List Holds, and Other Resource Sharing							
		Create & Delete a Temporary Record for a Non-RSA Interlibrary Loan Item					2024-03-19
		Items requested by a Non-RSA Library					2024-03-19
				D1500 Numbers How to Use Them and How to Search for Them			2024-01-23

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
Inventory Instructions and Item Statistics in WorkFlows							
			WorkFlows Inventory Instructions				2017-08-07

Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
				WorkFlows Item Statistics			2020-01-07
ILLINET and IPLAR Report Data							
			ILLINET – Where to find the data to complete the survey using BCA				2024-02-14
Library Codes, Item and Patron Barcode Prefixes							
						Item Barcode Prefixes	2024-02-06
						Library Codes	2023-09-22
						User Barcode Prefixes	2024-02-06
MobileStaff							
				Kiosk Mode in Mobile Staff			2022-10-03
				MobileStaff information			2021-03
Notices in WorkFlows							
	Workflows Notices						2021-10-27
			WorkFlows Notices				2022-04-18
			Printing Notices in WorkFlows				2020-08-05
				Printing WorkFlows Notices in Word			2023-12-06
				Patron Expiration Notice			??
RSAcat Search and Links							
				How the RSAcat New Book Carousels work			2024-04-11
					Basic RSAcat search (3:11)		2021-08-21
					How to Scope RSAcat Facets to Display Library Specific Results (4:13)		2020-04-23
					How to use the RSAcat mobile app (10:00)		2020-06-08

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
					Turning on Circulation History via RSAcat (1:01)		2020-06-06
Users (links to Users landing page)							
New Patron							2020-11-12
Patron Registration							2019-02-07
	Patron Registration Standard for School Libraries						2021-10-22
			User Registration for School Libraries				2018-03
					User Registration for School Libraries (10:41)		2020-07-28
		Enabling User Signature Uploads in WorkFlows					2024-03-12
		Institutional Cards					2021-10-27
		Reciprocal Patron Deletion Form					2024-04-03
		Reciprocal Patron Deletion Form (form)					2012-03-01
			Copy/Clone User During User Registration				2017-10
					How to Copy or Clone a user in Workflows (2:01)		2020-06-12
			User Registration for Academic Libraries				2018-03
			User Registration for Public Libraries				2018-03
					User Registration for Public Libraries (11:03)		2020-06-05
			User Registration Library Name Properties				2018-03
					Basic Patron Registration (46:10)		2024-03-26
			Configure Wizards to Start with User Search Helper				2024-04-30
User Cards							2013-12-05

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
		Children of Multiple Households					2024-02-09
			Most Commonly Used User Profiles				2022-04-18
			Removing a Request during Patron Deletion				2012-05
				Cards for Kids			2022-07
				Modify User/Preferred Name Bug			2021-08-03
				Non-Resident Library Services for Veterans			2022-03
				Property Settings for Check Duplicate User Search			??
				Replacing a Lost Library Card			2021-09-06
					Replace a Lost User Card (0:56)		2024-03-25
Patron Notes							2012-12
			Removing a Blank Note from a User's Account				2017-12
Retention Schedule for Expired Patron Cards							2023-08-09
		SEE-STAFF User Status					2023-03-15
			Creating and removing a Pop-Up Alert				2020-10-09
			Display User Wizard				2021-09-09
					Display User Wizard (2:40)		2021-10-27
			Intergovernmental Agreements				2019-02-28
			User Search Helper				2019-09-16
					Super Basic User Search (8:04)		2021-08-17
			When do I use these User Profiles				2024-01-16
					Finding the Previous User of an Item		2024-05-01
				Patron PIN Masking in WorkFlows			2019-02-19

Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
				User CAT Demographics Fields in WorkFlows Descriptions			2024-03-13
				User Cat 11 Meanings and When to Use them			2024-04-19
				User Profile Recommendations for in-house use accounts			2024-01-19
				User Registration Training Resources			2024-04-29
User Parameters (links to Users Parameters page)							
						Mandatory User Profile Codes*	2020-12-09
						User Profiles*	Monthly
						User Profile Differences	2024-05-07
WorkFlows Setup and Configuration, Receipts, Backup and Restore, Release Notes							
WorkFlows Setup and Configuration							
			Commonly Set preferences in Workflows for Circulation				2023-06-02
			Using WorkFlows Offline Mode				2023-10-24
			WorkFlows Supervisor Set-Up				2008-10-30
				Check your WorkFlows version number			2020-09-21
				Correct the Pathway for Viewing and Printing Reports in WorkFlows			??
				Entering Closed Dates in WorkFlows			2022-12
				How to Check the WorkFlows Max Response Size			2018-01
				Patron Photos in WorkFlows			2017-11

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
				Turn on Tabbed Windows in WorkFlows			??
				WorkFlows Classic View			2020-04-14

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
					WorkFlows Classic View (and how to get out of it) (3:17)		2020-04-16
Receipts							
			Installing a Thermal Receipt Printer				2016-04
			Receipt Configuration - Adding You Saved Info Line				2019-01-22
			Receipt Configuration - Available Holds Slips				2020-01-30
			Receipt Configuration - Date Due Slips Set Up				2023-02-02
			Receipt Configuration - Hold Wrapper Slip				2020-01-30
			Receipt Configuration - Pay Bill Slips				2017-06
			Receipt Configuration - Reshelving Slips				2016-03-31
			Receipt Configuration - Transit Slips				2020-01-30
				WorkFlows Receipt Setup Locations			2015-12-04
Backup and Restore WorkFlows Configurations							
			Back Up the WorkFlows Configuration Folder on Windows 7				2013-07-22
			Back Up the WorkFlows Configuration Folder on Windows 10				2016-08-17
			Copy the WorkFlows Configuration Folder on Windows XP				??
			Replace the Workflows Configuration Folder on Windows 7				2014-07-28
			Replace the Workflows Configuration Folder on Windows 10				2016-08-17

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
WorkFlows Tech Support and Download Files							
		Upgrading the WorkFlows Staff Client for Symphony 4.1.0.0					2024-03-19
			Workflows Upgrade Release Notes for Version 4.1				2024-03-12

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
Cataloging Handbook							
Cataloging Topic Overview							
Batch editing Items							
		Global Item Modification Wizard					2022-06-09
		Using the Item Group Editor to Search for Items Assigned Cataloging Codes					2014-02-25
		WorkFlows Item Group Editor Wizard					2016-04-26
Best Practices							
		Using a Shelf List versus the WorkFlows Inventory Item Wizard					2018-03-06
			Audio Enabled Books				2022-09-05
			Cataloging Best Practices for RSA Member Libraries				2018-05-16
			Cataloging Magazines in WorkFlows				2023-11-21
			GMDs versus Carrier Types on Bibliographic Records in WorkFlows				2017-02-09
			Pagination Considerations in Cataloging				2020-05-07
			What Is the Title Page Verso? A Parts of the Book Guide				2022-05-18
				Prefer Library of Congress Records When Cataloging			2023-06-27
Brief Records							
		Cataloging Die Shapes and Sets					2015-08-14
		Cataloging On Order Items					2022-10-11

Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
		When RSA is Ready to Upgrade Your Brief item to an OCLC Record					2023-05-10
					When RSA Is Ready to Upgrade Your Brief Item to an OCLC Record (12:15)		2023-03-21
			How To Create a Brief Record				2024-02-26
					How to Create a Brief Record with a UPC (06:41)		2022-06-30
					How to Create a Brief Record with an ISBN (07:43)		2022-06-30
					How to Create a Brief Record with an ISSN (06:40)		2022-06-30
					How to Create a Brief Record without an ISBN, ISSN, or UPC (06:57)		2022-06-30
				Cataloging 3 R's: Reserves, Rentals, and Rotating Collections			2013-06-24
Cataloging Codes							
			Considerations for WorkFlows Item Category 1				2014-03-10
			Getting Started with WorkFlows Item Categories 4 & 5				2014-04-24
			WorkFlows Item Categories 3, 4, and 5 FAQs				2013-09-10
				Asterisked Display of Cataloging Codes			2013-07-31
Cataloging Policies							
AV Item Types Elimination							2014-12-04

Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
Core Competencies for Cataloging Staff at RSA Member Libraries							2022-06-29
New Materials Item Types							2022-05-10
	New Materials Item Types						2022-08-22
	Bibliographic Database Standards						1999-05
Database Maintenance							
				Database Maintenance Reports			2024-03-22
				Tidy Cataloging Tips (05:34)			2020-04-23
Entering Items							
		Bibload					2023-10-18
				OCLC Cataloging Level Loading Bib Records (12:09)			2016-03-14
		Change the Owning Library for an Item Cataloged in WorkFlows					2020-04-21
		Creating Call Numbers for Multi-Piece Items					2018-11-06
		Steps for Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows					2020-07-08
		Steps for Cataloging an Item (Duplicate Copy)					2020-07-08
Matching							
				Do Not Use a Record When			2023-03-01
				Matching an OCLC Record to Your Book			2021-02-25
				Matching an OCLC Record to Your Video or Sound Recording			2021-03-01

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
				Matching a Record to Your Magazine			2023-11-21
					Bibliographic Record Tidbits (08:40)		2020-04-23
					Search, Match, and Attach (05:31)		2023-08-17
Overviews							
			Overview of the New Cataloging Process for Items without matching records				2023-03-24
				Cataloging At-A-Glance			2024-04-12
Removing Items							
		Deleting Items in WorkFlows					2019-09-12
		WorkFlows Discard User					2018-12-14
					Discard User, an Overview (11:06)		2020-08-06
Reporting Issues to RSA							
Advance Readers Copies							2019-05-09
Pirated Items							2019-05-09
		Advanced Reader Copy (ARC) or Pirated Item in WorkFlows					2020-01-20
		Reporting Cataloging Issues to RSA					2022-10-13
Searching for Items							
			Search Strategy Guide for the WorkFlows Call Number and Item Maintenance Wizard				2019-05-07
					Forgotten Search Strategies 1 (06:55)		2020-04-23
					Forgotten Search Strategies 2 (06:00)		2020-04-23
			WorkFlows format search enhancement				2020-12-14

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Policies	Standards	Procedures	Guides	Cheat Sheets	Videos	Parameters	Last updated/ reviewed
			WorkFlows Search Tips				2023-11-28
				RSAcat Library of Things Search Limit			2020-02-13
Settings							
		Change the Default Library in the Call Number and Item Maintenance Wizard					2020-04-21
			WorkFlows Cataloging Set-Up				2023-05-18
Transferring Items							
		Transfer Wizard					2020-08-19
					Basic Cataloging Level Transfer Wizard (6:28)		2016-03-14
Cataloging Parameters (links to Cataloging Parameters Page)							
						Home Location List*	2023-11-08
						Item Category 1 list*	2017-12-11
						Item Category 2 list*	2014-03-04
						Item Category 3 list*	2024-03-01
						Item Category 4 list*	2024-04-23
						Item Category 5 list*	2024-03-08
						Item Types*	2023-11-08
						Mandatory Codes for RSA Libraries*	2021-10-15
						Serials Holdings Codes*	Monthly
Asterisk denotes document held on old support site							

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