

Circulation 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.

Circulation Handbook: <https://support.librariesofrsa.org/handbook/circulation/>.

1. Circulation Helpers Guide (2017-11):
<https://support.librariesofrsa.org/project/guide-circulation-helpers/>.
2. Special Due Date Helpers Guide (2013-05):
<https://support.librariesofrsa.org/project/guide-special-due-date-helpers/>.
3. Special Due Date Helpers Video (3:25) (2021-05-04):
https://www.youtube.com/watch?v=_oQIMDmAGNU.

Checking Out

4. Checking out an item Video (3:30) (2021-05-04):
<https://www.youtube.com/watch?v=VXtnb5cCsFs>.
5. Create and Delete a Temporary Record for a Non-RSA Interlibrary Loan Item Procedure: <https://support.librariesofrsa.org/project/create-a-temporary-record-for-a-non-rsa-interlibrary-loan-item/>.

Discharging Items

6. Discharging Items Cheat Sheet (2017-11):
https://support.librariesofrsa.org/project/discharge-items/#Discharging_Items.
7. Discharge Items Transit Popup Box (2017-07):
https://support.librariesofrsa.org/project/discharge-items/#Discharge_Item_Transit_Popup_Box.
8. Back Dating Returns Using "Discharging Bookdrop" (2024-01-24):
https://support.librariesofrsa.org/project/discharge-items/#Back_Dating_Returns_Using_%E2%80%9CDischarging_Bookdrop%E2%80%9D
9. Returning Materials (3 Wizards) Video (8:04) (2021-08-06):
<https://www.youtube.com/watch?v=ajgP5mte-7U>.

Email Receipt Buttons

10. Email Receipt Buttons Guide (2017-12): <https://support.librariesofrsa.org/project/guide-email-receipt-buttons/>.

Item Renewal

11. Item Renewal Policy (2024-02-09): https://support.librariesofrsa.org/project/item-renewal/#Item_Renewal.
12. Renewing Items Cheat Sheet (2017-12): https://support.librariesofrsa.org/project/item-renewal/#Renewing_Items.
13. Basic WorkFlows Renewals Video (4:36) (2021-08-06): <https://www.youtube.com/watch?v=HvCMK6d9RBs>.

Lost, Missing, Damaged and LOSTTRANS Items

14. Receipt of Damaged Material Policy (2019-11-07): https://support.librariesofrsa.org/project/lost-missing-damaged/#Receipt_of_Damaged_Material.
15. Adding a Note About Item Damage Cheat Sheet (2020-01): https://support.librariesofrsa.org/project/lost-missing-damaged/#Adding_a_Note_About_Item_Damage.
16. Mark Item Missing Wizard Guide (2023-10-25): https://support.librariesofrsa.org/project/lost-missing-damaged/#Mark_Item_Missing_Wizard.
17. Mark Item Lost Wizard (2024-03-13): https://support.librariesofrsa.org/project/lost-missing-damaged/#Mark_Item_Lost_Wizard.
18. Processing Found LOSTTRANS Items Cheat Sheet (2018-03-07): https://support.librariesofrsa.org/project/lost-missing-damaged/#Processing_Found_LOSTTRANS_Items.

There are also Training Resource Cheat Sheets available for the following topics

1. Billing Training Resources Cheat Sheet (2024-04-26): https://support.librariesofrsa.org/project/billing/#Billing_Training_Resources.
2. Holds Training Resources Cheat Sheet (2024-04-26): https://support.librariesofrsa.org/project/holds/#Holds_Training_Resources.
3. Users Training Resources Cheat Sheet: (2024-04-18): https://support.librariesofrsa.org/project/users/#Users_Training_Resources.