

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed | |
|--|-----------|------------|---|--|--------------------------|------------|---------------------------|------------|
| About RSA | | | | | | | | |
| Directors and Admin Handbook | | | | | | | | |
| Training Policy Update | | | | | | | 2019-12-09 | |
| | | | Illinois Library System Act | | | | ?? | |
| | | | RAILS / RSA What are the Differences? | | | | 2024-03-19 | |
| | | | | RSA Contact List | | | | 2024-03-04 |
| | | | | Terms Used in Policies | | | | 2024-03-08 |
| Get in Touch | | | | | | | | |
| Email Groups Listing | | | | | | | | |
| | | | | RSA Email Groups Addresses - Suggested and Mandatory Memberships | | | | 2024-08-16 |
| | | | | RSA Email Groups Signup & Selection Form | | | | 2024-05-15 |
| General Forms | | | | | | | | |
| | | | | Change Contact Primary Email Account | | | | 2024-05-17 |
| | | | | Change Your Library's Hours, Contact Info, Address and More Form | | | | 2022-01-17 |
| | | | | Open a New Case in the RSA Help Desk Form | | | | 2022-01-17 |
| | | | | Request an In-Person or Virtual Site Visit with Member Services or Cataloging Form | | | | 2024-01-25 |
| | | | | RSA Site Visit Evaluation Form | | | | 2021-02-23 |
| | | | | RSA Training Course or Workshop Evaluation Form | | | | 2021-02-18 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|-----------------------------|-----------|------------|--------|--------------|--|------------|---|
| Report Request Forms | | | | | | | |
| | | | | | Report Request: Correct, Modify, or Update an Existing Subscription Form | | 2022-02-23 |
| | | | | | Report Request: New Report Subscription Form | | 2023-05-12 |
| | | | | | Report Request: One-time Report Form | | 2022-01-17 |
| | | | | | Report Request: Resend a Scheduled Report Form | | 2022-01-17 |
| Governance | | | | | | | |
| Governance Documents | | | | | | | |
| | | | | | | | RSA Bylaws |
| | | | | | | | 2024-07-01 |
| | | | | | | | RSA Intergovernmental Agreement |
| | | | | | | | 2024-07-01 |
| | | | | | | | RSA Intergovernmental Agreement - Exhibit A |
| | | | | | | | 2024-06-30 |
| | | | | | | | RSA Membership Regions and Members by Region |
| | | | | | | | 2024-07-01 |
| Governance and Admin | | | | | | | |
| | | | | | | | RSA Member Library Responsibilities |
| | | | | | | | 2016-07-12 |
| | | | | | | | Defining Policies, Standards, Procedures, and more |
| | | | | | | | 2021-10-27 |
| | | | | | | | Implications of an RSA Member Library Withdrawing OCLC Membership |
| | | | | | | | 2024-03-26 |
| | | | | | | | RSA System Functionality Detailed |
| | | | | | | | 2024-07-01 |
| | | | | | | | RSA System Functionality Overview |
| | | | | | | | 2024-07-01 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|---|-----------|---|--|--------------|--------------------------|--|---------------------------|
| Independence Project | | | | | | | |
| | | | Key Dates in RSA's Independence Project* | | | | 2023-08-04 |
| Member Libraries | | | | | | | |
| | | RAILS Delivery Codes and Labeling | | | | 2024-07-03 | |
| | | | | | | RSA Library Delivery Codes | 2024-04-29 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|------------|---|--|--|---|---------------------------|
| Operations Manual | | | | | | | |
| | | | RSA Operations Manual | | | | 2024-07-12 |
| 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 | | | | 2019-11-22 |
| | | | Library Items | | | | |
| | | | Adding a Bill and Bill Note Before Removing a Lost Item | | | | 2024-08-26 |
| | | | | | Adding a Bill and Bill Note Before Removing a Lost Item (video 1:25) | | 2024-04-09 |
| | | | Bill Notes | | | | 2024-04-09 |
| | | | | Billing a User | | | 2024-04-09 |
| | | | | Billing Training Resources | | | 2024-04-26 |
| | | | | | Paying Bills in WorkFlows or Online (video 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 |
| BLUEcloud Analytics (BCA) | | | | | | | |
| | | | BLUEcloud PII Library Agreement | | | | 2024-03-21 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed | |
|---|-----------|---|--|--|---|------------|---------------------------|------------|
| BLUEcloud PII Staff Agreement | | | | | | | 2024-03-21 | |
| | | | BC Analytics – Exploring Data with Excel | | | | 2016-09-14 | |
| | | | | Interactive Collection / Shelflist Browser | | | 2024-08-06 | |
| | | | BC Analytics – Save and Save As vs Create Personal View | | | | 2016-08-25 | |
| | | | | BLUEcloud Analytics - Creating a Personal View | | | 2024-08-05 | |
| | | | | | BLUEcloud Analytics - Creating a Personal View (video 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 | | | 2024-08-16 | |
| | | | | | BLUEcloud Analytics - Logging In (video 3:25) | | 2021-04-22 | |
| | | | | BLUEcloud Analytics - Running a Report | | | 2024-08-05 | |
| | | | | | BLUEcloud Analytics - Running a Report (video 4:28) | | 2021-04-22 | |
| | | | | BCA – WorkFlows Terminology | | | 2016-12-12 | |
| Circulation Handbook | | | | | | | | |
| Circulation Topic Overview | | | | | | | | |
| Add Brief Title Helper | | | | | | | | |
| | | Setting Up the Add Brief Title Helper | | | | | | 2024-07-29 |
| | | | Using the Add Brief Title Helper | | | | 2024-07-29 | |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|---|--|--|---|------------|---------------------------|
| Checkout | | | | | | | |
| | | | | | Display an Alert for Previous Loan | | 2024-03-06 |
| | | | | | Checking out an Item (video 3:20) | | 2021-05-04 |
| Circulation Helpers in WorkFlows | | | | | | | |
| | | | Circulation Helpers | | | | 2017-11 |
| Circulation Overview | | | | | | | |
| | | | | | Basic Circulation Workshop (video 42:15) | | 2023-01-11 |
| | | | | | WorkFlows Circulation Overview for School Libraries (video 46:15) | | 2020-08-31 |
| Circulation Quick Reference Guide (WorkFlows) | | | | | | | |
| | | | WorkFlows Circulation Quick Reference | | | | 2022-05 |
| Circulation Training | | | | | | | |
| | | | | Circulation Training | | | 2024-06-18 |
| 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 | | | | | 2024-06-26 |
| Discharge Items (links to Discharge Item page) | | | | | | | |
| | | | Back Dating Returns Using "Discharging Bookdrop" | | | | 2024-01-24 |
| | | | | Discharge Item Transit Popup Box | | | 2017-07 |
| | | | | Discharging Items | | | 2017-11 |
| | | | | | Basic Workflows - Returning Materials (3 Wizards) (video 8:04) | | 2021-08-06 |
| Email Receipt Buttons | | | | | | | |
| | | | Email Receipt Buttons | | | | 2017-12 |
| Fine Fee Recommendations | | | | | | | |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|---|-----------|--|--|---|--|------------|---------------------------|
| | | | 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 |
| | | | | | Basic WorkFlows Renewals video (4:36) | | 2021-08-06 |
| | | | | To-Date Checkouts and Renewals | | | 2020-01-08 |
| Item Search Helper | | | | | | | |
| | | | Item Search Helper | | | | 2019-03 |
| Keyboard Shortcuts | | | | | | | |
| | | | | Function Keys and Keyboard Shortcuts for the Circulation Module | | | ?? |
| Lost, Missing, Damaged and LOSTTRANS Items | | | | | | | |
| | | | | | | | 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 |
| 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 | | | | | | | |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|------------------------------------|-----------|------------|--------|--------------|--|---|---------------------------|
| | | | | | Most Popular Reports for Circ Managers and Where to Locate them in BCA | | 2023-08-25 |
| Serials Control Module | | | | | | | |
| | | | | | Using the Serial Control Module in WorkFlows | | 2024-08-05 |
| Special Due Date Helpers | | | | | | | |
| | | | | | Special Due Date Helpers | | 2024-08-16 |
| | | | | | Special Due Date Helpers (video 3:25) | | 2021-04-05 |
| Circulation Parameters | | | | | | | |
| | | | | | | Circ Rule Helper Checklist* | ?? |
| | | | | | | Circ Rule Helper Checklist - Printable* | ?? |
| | | | | | | Expanded Circ Map* | Monthly |
| Die Cut Shapes | | | | | | | |
| | | | | | Die Cut Shapes Collection | | 2024-03-21 |
| | | | | | Die Shape Collection List | | 2024-06-17 |
| Ebooks, Apps, and Marketing | | | | | | | |
| | | | | | RSA ShoutBomb Brochure PDF | | 2022-03 |
| | | | | | RSA ShoutBomb Brochure Word | | 2022-03 |
| CloudSource OA | | | | | | | |
| | | | | | Accessing Online Articles (aka CloudSourceOA) in RSAcat | | 2022-07-29 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|------------|--|--|--------------------------|------------|---|
| | | | 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 | | | | | | | |
| | | | | | | | 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 |
| | | | RAILS Delivery Codes and Labeling | | | | 2024-07-03 |
| | | | 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 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|----------|-----------|------------|--|---|---|------------|---------------------------|
| | | | | | Basic Holds Workshop video (58:40) | | 2021-07-22 |
| | | | Place Hold Wizard Helpers | | | | 2017-07 |
| | | | | | Placing Holds video (6:53) | | 2021-04-13 |
| | | | Placing Book Club/ Classroom/ Research Holds | | | | 2017-07 |
| | | | | | Placing Book Club and Classroom Holds in WorkFlows video (6:30) | | 2020-04-16 |
| | | | | | Place Research Holds video (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 |
| | | | Why didn't my patron's hold get filled by my item? | | | | 2021-05 |
| | | | | Onshelf Items Wizard | | | 2024-08-16 |
| | | | | | WorkFlows Onshelf Items Wizard video (3:48) | | 2020-06-12 |
| | | | | Hold Shows Available but Hasn't Transited to Pickup Library | | | 2024-04-26 |
| | | | | Holds Block Override Popup Box | | | 2017-07 |
| | | | | Holds Training Resources | | | 2024-04-26 |
| | | | | Looking up the Pick List on Gmail & Trapping Holds | | | 2008-09 |
| | | | | Placing Copy Level Holds | | | 2017-07 |
| | | | | Placing Title Level Holds | | | 2017-07 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|---|-----------|------------|--|---|--|---|---------------------------|
| | | | | Sorting the Onshelf Items List | | | ?? |
| | | | | When Items are Unavailable to Fill Hold or Picklist Request | | | 2017-07 |
| | | | | | Basic Item Search and Display video (8:04) | | 2021-08-06 |
| Holds Parameters (links to Holds Parameters Page) | | | | | | | |
| | | | | | | Hold Map | Monthly |
| | | | | | | Hold Rule Helper Checklist - Printable* | ?? |
| | | | | | | Hold Rule Helper Checklist* | ?? |
| | | | | | | Membership and Holds Groupings | 2022-09-20 |
| Interlibrary Loan, Union List Holds, and Other Resource Sharing | | | | | | | |
| | | | 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 |
| Inventory Instructions and Item Statistics in WorkFlows | | | | | | | |
| | | | WorkFlows Inventory Instructions | | | | 2024-07-10 |
| | | | | 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 |
| | | | Running Statistics Reports for Digital Collections in eRead Illinois | | | | 2024-06-03 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------------------------------|------------|--|--|--|---|---------------------------|
| | | | Running Statistics Reports for Digital Collections in Overdrive/ADML | | | | 2024-06-03 |
| Library Codes, Item and Patron Barcode Prefixes | | | | | | | |
| | | | | | | Library Codes | 2023-09-22 |
| | | | | | | RSA Item Barcode Prefixes | 2024-07-22 |
| | | | | | | RSA User Barcode Prefixes | 2024-07-22 |
| 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 using WordPad | | | | 2024-06-17 |
| | | | | Printing WorkFlows Notices in Word | | | 2023-12-06 |
| | | | | Patron Expiration Notice | | | ?? |
| Reports | | | | | | | |
| | | | | New Format to End of Month Reports | | | 2022-11-03 |
| | | | | New Monthly Reports | | | 2022-08-04 |
| RSACat Search and Links | | | | | | | |
| | | | | How the RSACat New Book Carousels work | | | 2024-04-11 |
| | | | | | Basic RSACat search video (3:11) | | 2021-08-21 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|---|-----------|------------|--------|--------------|---|------------|---------------------------|
| | | | | | How to Scope RSACat Facets to Display Library Specific Results video (4:13) | | 2020-04-23 |
| | | | | | How to use the RSACat mobile app video (10:00) | | 2020-06-08 |
| | | | | | Turning on Circulation History via RSACat video(1:01) | | 2020-06-06 |
| Users (links to Users landing page) | | | | | | | |
| Patron Notes | | | | | | | 2012-12 |
| | | | | | Removing a Blank Note from a User's Account | | 2017-12 |
| Patron Registration | | | | | | | 2024-06-04 |
| | | | | | Patron Registration Standard for School Libraries | | 2021-10-22 |
| | | | | | User Registration for School Libraries | | 2018-03 |
| | | | | | User Registration for School Libraries video (10:41) | | 2020-07-28 |
| | | | | | Enabling User Signature Uploads in WorkFlows | | 2024-03-12 |
| | | | | | Institutional Cards | | 2024-07-23 |
| | | | | | 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 video (2:01) | | 2020-06-12 |
| | | | | | User Registration for Academic Libraries | | 2018-03 |
| | | | | | User Registration for Public Libraries | | 2018-03 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|---|-----------|---|--|---|--|------------|---------------------------|
| | | | | | User Registration for Public Libraries video (11:03) | | 2020-06-05 |
| | | | User Registration Library Name Properties | | | | 2018-03 |
| | | | | | Basic Patron Registration video (46:10) | | 2024-03-26 |
| | | | Configure Wizards to Start with User Search Helper | | | | 2024-04-30 |
| Retention Schedule for Expired Patron Cards | | | | | | | 2023-08-09 |
| | | | | | Purge Patron Form | | 2024-06-26 |
| Patron Cards | | | | | | | 2024-08-01 |
| | | 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 | | | 2024-08-16 |
| | | | | | Replacing a Lost Library Card (video 0:56) | | 2024-03-25 |
| | | 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 video (2:40) | | 2021-10-27 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|------------|---|--|--|--|---------------------------|
| | | | Intergovernmental Agreements | | | | 2019-02-28 |
| | | | User Search Helper | | | | 2019-09-16 |
| | | | | | Super Basic User Search video (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 |
| | | | | User Cat 11 Meanings and When to Use them | | | 2024-04-19 |
| | | | | User CAT Demographics Fields in WorkFlows Descriptions | | | 2024-03-13 |
| | | | | 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 | 2024-08-20 |
| | | | | | | User Profile Differences | 2024-05-07 |
| | | | | | | User Profiles* | Monthly |
| 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 | | | | 2024-06-17 |
| | | | | Check your WorkFlows version number | | | 2020-09-21 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|------------|--------|---|--|------------|---------------------------|
| | | | | Correct the Pathway for Viewing and Printing Reports in WorkFlows | | | ?? |
| | | | | Entering Closed Dates in WorkFlows | | | 2024-08-19 |
| | | | | How to Check the WorkFlows Max Response Size | | | 2018-01 |
| | | | | Patron Photos in WorkFlows | | | 2017-11 |
| | | | | Turn on Tabbed Windows in WorkFlows | | | ?? |
| | | | | WorkFlows Classic View | | | 2020-04-14 |
| | | | | | WorkFlows Classic View (and how to get out of it) video (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 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|---|--|--------------|--------------------------|------------|---------------------------|
| | | | 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 |
| 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 |
| School Specific | | | | | | | |
| | | | Welcome Back School Library Staff | | | | 2024-08-23 |
| 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 | | | | | | | |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed | |
|----------------------|-----------|--|---|--|--|------------|---------------------------|------------|
| | | Cooperative (Co-op) Collection | | | | | 2024-06-27 | |
| | | Using a Shelf List versus the WorkFlows Inventory Item Wizard | | | | | 2018-03-06 | |
| | | | Audio Enabled Books | | | | | 2023-09-05 |
| | | | 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 | |
| | | 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 video (12:15) | | 2023-03-21 | |
| | | | Creating a Brief Record | | | | | 2024-05-31 |
| | | | | | How to Create a Brief Record with a UPC video (06:41) | | 2022-06-30 | |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|------------|--|--|--|------------|---------------------------|
| | | | | | How to Create a Brief Record with an ISBN video (07:43) | | 2022-06-30 |
| | | | | | How to Create a Brief Record with an ISSN video (06:40) | | 2022-06-30 |
| | | | | | How to Create a Brief Record without an ISBN, ISSN, or UPC video (06:57) | | 2022-06-30 |
| | | | | Cataloging Reserves & Rentals | | | 2024-06-28 |
| 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 |
| Core Competencies for Cataloging Staff at RSA Member Libraries | | | | | | | 2022-06-29 |
| Homosaurus Cataloging | | | | | | | 2024-08-01 |
| New Materials Item Types | | | | | | | 2022-05-10 |
| | | | New Materials Item Types | | | | 2022-08-22 |
| | | | Bibliographic Database Standards | | | | 1999-05 |
| Database Maintenance | | | | | | | |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|-----------------------|-----------|---|---|--|---|------------|---------------------------|
| | | | | Database Maintenance Reports | | | 2024-03-22 |
| | | | | | Tidy Cataloging Tips video (05:34) | | 2020-04-23 |
| Entering Items | | | | | | | |
| | | Bibload | | | | | 2024-08-27 |
| | | | | | OCLC Cataloging Level Loading Bib Records video (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 a Record to Your Magazine | | | 2023-11-21 |
| | | | | Matching an OCLC Record to Your Book | | | 2021-02-25 |
| | | | | Matching an OCLC Record to Your Video or Sound Recording | | | 2021-03-01 |
| | | | | | Bibliographic Record Tidbits video (08:40) | | 2020-04-23 |
| | | | | | Search, Match, and Attach video (05:31) | | 2023-08-17 |
| Overviews | | | | | | | |
| | | | Overview of the New Cataloging Process for Items without matching records | | | | 2023-03-24 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|---|---|---|--------------------------|------------|---------------------------|
| | | | | Cataloging At-A-Glance | | | 2024-08-08 |
| Removing Items | | | | | | | |
| | | Deleting Items in WorkFlows | | | | | 2019-09-12 |
| | | WorkFlows Discard User | | | | | 2024-07-30 |
| | | | | Discard User, an Overview video (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 video (06:55) | | | 2020-04-23 |
| | | | | Forgotten Search Strategies 2 video (06:00) | | | 2020-04-23 |
| | | | WorkFlows format search enhancement | | | | 2020-12-14 |
| | | | 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 |

RSA Documentation for Member Libraries

| Policies | Standards | Procedures | Guides | Cheat Sheets | Other (Forms and Videos) | Parameters | Last updated/ reviewed |
|--|-----------|---------------------------------|---|--------------|--|---|---------------------------|
| | | | WorkFlows Cataloging Set-Up | | | | 2024-07-03 |
| Transferring Items | | | | | | | |
| | | Transfer Wizard | | | | | 2020-08-19 |
| | | | | | Basic Cataloging Level Transfer Wizard video (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* | 2024-08-12 |
| | | | | | | Item Category 5 list* | 2024-07-26 |
| | | | | | | Item Types* | 2023-11-08 |
| | | | | | | Mandatory Codes for RSA Libraries | 2021-08-20 |
| | | | | | | Serials Holdings Codes* | Monthly |
| Asterisk denotes document held on old support site | | | | | | | |