



Resource Sharing Alliance
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Welcome Back School Library Staff Guide

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Welcome back

Are you new to your school, or new to the library? Have you not heard of the Resource Sharing Alliance (RSA)? Do you need help checking out, placing holds, or cataloging materials? Are you having trouble logging into Workflows? Do you not know what Workflows is? Would you like RSA staff to visit you?

If you have questions, Please Bug Us!

You can contact us by phone at 866-940-4083 or email the RSA Helpdesk (help@rsanfp.org). Our support site can be found at: <https://support.librariesofrsa.org/>.

We are here to help, whether you are brand new or a veteran library staff member. RSA is your library consortium. We provide access, training, and catalog support for library software called Workflows to about 135 member libraries. And your library is a member.

See below for more important information and some start of school year reminders.

Closing Dates & End-of-Semester Dates

You may start submitting your closure dates for the 2024/2025 school year as soon as you know them. Send an email to help@rsanfp.org with the closure dates listed. Please do not send calendars.

EOS dates for the 2024/2025 school year for ALL school libraries who use them will be set to **5/16/2025** unless otherwise instructed. All check outs will be due on this date. If you wish to set a different EOS date, email the RSA Helpdesk at help@rsanfp.org notifying us of the date that you wish to use.

If you would like books returned at the end of first semester in December before winter break, we can add that date also. The End of Semester date is used by the system to reduce your standard loan period when approaching that date. The End of Semester date becomes the due date when normal loan periods extend beyond that date. If you provide December and May dates, once the December date passes, your checkouts return to your normal loan length until the May date approaches.

If you notice your materials checking out for one day, the reason is probably that your last End of Semester date has passed and needs to be updated. Please email help@rsanfp.org with your 2024/2025 End-of-Semester dates.

Delivery Start Date

Delivery of materials for schools will resume on Monday, August 26, 2024. Please stay tuned for an email from RAILS Delivery with more information about this. If you have questions about delivery, please email railsdelivery@railslibraries.org or call Robert Morgan, RAILS East Peoria Delivery Services Manager, at (309) 798-6842.

RAILS Delivery changed their process about a couple of years ago. Delivery labels should now include the destination library's Delivery Code rather than the library name. The RSA Membership list has been updated to include these new codes. Please download a fresh copy of the RSA Membership list from: <https://support.librariesofrsa.org/about/member-libraries/>.

RSA has created a guide to new membership list and labeling procedure, available here: https://support.librariesofrsa.org/wp-content/uploads/2024/06/RSA_Library_Delivery_Codes-2024-06-28.pdf.

Until delivery resumes on August 26, the RSA cataloging department will not place holds on school libraries' items that are cataloged on brief records, for the purpose of upgrading them to OCLC records with full bibliographic description.

Request a visit

RSA staff can visit your school library and help you review lots of Workflows-related topics, including (but not limited to) configurations, circulation tips and tricks, overdue/ bill/ courtesy notices, hold and circulation rules, inventory, hold picklists, billing, and other RSA-related topics.

You can request a virtual or in-person visit using this form:

<https://form.jotform.com/RSAfp/RSA-site-visit-request>

Your colleagues can sign up for these messages

Share this link with any of your colleagues who don't receive these emails. Sign up here:

<https://form.jotform.com/RSAfp/rsa-email-groups>.

Having trouble logging in to Workflows?

Your IP (internet protocol) address that allows your library to connect to Workflows may have changed. Please give us a call at 866-940-4083 or email help@rsanfp.org for assistance.

Workflows Quick Reference

A Quick Reference guide for some common problems is available here:

<https://support.librariesofrsa.org/project/workflows-circulation-quick-reference-guide/>.

Don't see your problem mentioned here? Please call at 866-940-4083 or email

help@rsanfp.org for assistance.

Restore your Workflows Configuration Folder onto your computer

Instructions can be found here: https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore

Don't forget to create a back-up of your Workflows Configuration Settings! Once you've settled in and (hopefully) have your Workflows configured to your needs, please take a moment to create a backup of your configuration settings. We recommend saving this folder to a thumb drive and keeping it somewhere safe. This backup can be used to transfer Workflows configurations from one computer to another. We also find that many schools lose Workflows configurations over the summer as other updates are made to their library computers.

Instructions to create and use a backup can be found here:

https://support.librariesofrsa.org/project/setup-config-backup/#Backup_and_Restore.

If you need more information about Workflows Configurations, there are many guides on the [Setup & Configuration page of the RSA Support Site](#).

Training Videos

A playlist of short training videos targeted for School Library Staff is available on the RSA NFP YouTube Channel:

https://www.youtube.com/watch?v=EJoML4XqN84&list=PLt2wA_EbLSx_YcD7YyB2RD1tpAgC6_tI4&pp=iAQB.

Is there a Workflows topic you think would be helpful to create as a video? Please email help@rsanfp.org to share your suggestion!

RSA's School Cataloging Needs Survey

RSA's Cataloging Department is asking that you complete the School Cataloging Needs Survey. Click on this link to complete the survey: <https://form.jotform.com/RSAnfp/school-cataloging-needs>. Once they have had a chance to look over your answers, one of the team

will reach out to you. Just one person at each RSA school library needs to complete the survey.

Need Help Cataloging an Item?

If you need to catalog an item, but you are unable to find a matching record in Workflows, or you are unsure if the record you found matches the item, please remember to create a brief record in Workflows. The RSA cataloging request forms are no longer available. Once you create the brief record, the item is ready to start checking out to users.

For step-by-step instructions how to create a brief record, along with screenshots of example brief records, refer to this guide: <https://support.librariesofrsa.org/project/create-a-brief-record/>. If you only want to print the instructions and not the example brief records, select pages 1-4 when you print.

For videos that show how to create brief records, check out this playlist on the RSA YouTube channel:

https://www.youtube.com/watch?v=EJoML4XqN84&list=PLt2wA_EbLSx_YcD7YyB2RD1tpAgC6_tI4.

If you would like to be guided through creating a brief record, contact help@rsanfp.org. RSA will schedule a Zoom screen sharing session at a time that works for you.

An RSA cataloger will email you when they are ready to upgrade your brief item to an OCLC record with full bibliographic description. RSA will place a copy-level hold on the brief item, asking you to send it to RAILS East Peoria. This approach avoids the accumulation of a backlog and allows RSA to process items faster, within 14 business days of the RSA cataloger picking it up from RAILS East Peoria.

Please do not send any items to RAILS East Peoria until you receive an email from RSA that they are placing a hold to upgrade it to an OCLC record. If you do not want to send your item, reply to the email to let RSA know so they can cancel the hold.

Once the brief item has been upgraded to an OCLC record, RSA will email you to confirm and then return the item in delivery. For more detailed information about what will happen when RSA is ready to upgrade your brief item to an OCLC record, refer to this document: <https://support.librariesofrsa.org/project/procedure-when-rsa-is-ready-to-upgrade-your-brief-item-to-an-oclc-record/>.

Questions about brief records or anything else cataloging-related? Please call 1-866-940-4083 and ask to talk to an RSA cataloger!

Items Sent in Delivery to RSA Cataloging

Your library may have sent brief items to RAILS East Peoria last May for RSA to upgrade to OCLC records. If the items were ready to be returned to you, but your delivery had stopped, your items are being kept at RAILS East Peoria until delivery resumes for your library on Monday, August 26, 2024.

The RSA cataloging department will resume placing holds on brief items created by school libraries on September 9, 2024. You will see these items appear on your library's holds picklist. Thank you in advance for your cooperation sending items so their records can be upgraded to OCLC records, making them easier to find in Workflows and the RSAcat!

On May 1, 2025, RSA will pause placing holds on school libraries' items that are cataloged on brief records until delivery resumes in the fall. These holds are placed for the purpose of upgrading the brief records to OCLC records with full bibliographic description. More information about the procedure RSA follows when they are ready to upgrade a brief item to an OCLC record is available here: <https://support.librariesofrsa.org/wp-content/uploads/2024/04/When-RSA-is-Ready-to-Upgrade-Your-Brief-item-to-an-OCLC-Record-Procedure-2023-05-10.pdf>. RSA will attempt to catalog and return any items prior to delivery stopping on May 24th. If that's not possible, items will be held in the East Peoria delivery hub until delivery resumes in the fall.

Holds and Picklists – a refresher

There has been a lot of staff turnover at RSA's school library members, so we thought it would be a good time to provide you with an update on Holds and Picklists.

The best place to start is the documentation we have on our support site that cover Holds and Picklists.

Our guide on How Holds Work can be found here: <https://support.librariesofrsa.org/wp-content/uploads/2024/01/How-Holds-Work-Guide-2017-07.pdf>

Our guide on How Picklists Work can be found here: <https://support.librariesofrsa.org/wp-content/uploads/2024/01/How-Picklists-Work-Guide-2021-04-05.pdf>

The most important thing to remember is to be checking your RSA Gmail address at least once a day. This is important not just you may receive other vital communication at this account (questions from other libraries, email failure notices, etc.), but because this is also where you will receive your library's Clean Hold Shelf List. A cheat sheet on the Clean Hold

Shelf Report can be found here: <https://support.librariesofrsa.org/wp-content/uploads/2024/01/Clean-Hold-Shelf-Report-Cheat-Sheet-2017-07.pdf>.

RSA staff run a Holds Workshop on a Monthly basis. You can sign up for the next one on September 16, 2024 from 3-4:30pm here: <https://librarylearning.org/event/2024-09-16/rsa-basic-workflows-holds-workshop>. Please note that you must log into L2 to sign up for our workshops. We send monthly notices about upcoming workshops by email. Feel free to sign up to these workshops when those announcements are sent out.

RSA's cataloging team will resume placing holds on your items for brief record upgrades will start on September 9th

Our cataloging team will start placing holds on items belonging to our school members which need an upgraded catalog record. Please review this procedure so that you know what to expect: <https://support.librariesofrsa.org/wp-content/uploads/2024/04/When-RSA-is-Ready-to-Upgrade-Your-Brief-item-to-an-OCLC-Record-Procedure-2023-05-10.pdf>.

They will place a copy-level hold on your item. If other staff at your library pull items to fill holds (and are unaware of our cataloging process), you may want to give them a heads-up that this item will be sent to RSA for cataloging, so they understand the hold is not a mistake.

When you fill out the RAILS delivery label, please write 200-EP on the "To" line, your full library name on the "From" line, and circle "Hold." No need to fill out anything else on the delivery label.

Please be aware that RSA is only accepting physical items to upgrade brief records to OCLC records.

If your library needs additional delivery bins to send items to RSA for cataloging, please email the RAILS Delivery Help Desk at railsdelivery@railslibraries.org.

RAILS delivery to schools will resume on August 26th, 2024

RAILS will resume making deliveries and collections from school libraries next Monday. If you have questions about RAILS Delivery, please email the RAILS Delivery Help Desk at railsdelivery@railslibraries.org. You will be receiving communications about this resumption from Robert, the East Peoria delivery manager.

An up-to-date list of RSA members with delivery codes can be found here: <https://support.librariesofrsa.org/about/member-libraries/>.

Information on RSA's Independence project

Information on RSA's new governance structure, and fee structure for Fiscal Years 2025-2029 has been sent to school librarians and administrators. This information can also be found at <https://support.librariesofrsa.org/independence-project/>.

Information from RAILS

We thought we'd pass on some information that RAILS recently shared. RAILS recently shared two updates with their members which we wanted to ensure RSA school libraries had seen.

ISL Statewide E-Resource Package: What Schools Need to Know. See <https://railslibraries.org/news/114189> for exciting news about the new Statewide E-Resource package and how schools can make it available to their faculty and students.

What Schools Need to Know About PA 103-0100. See <https://railslibraries.org/news/113339> for important information about a recent state law.

RSA's Bug Us Campaign Goodies on their way to you.

RSA has put together a collection of goodies to welcome you back to school as part of our "Bug Us" Campaign. Delivery starts up on Monday, August 26th and in your first delivery bin you will find a gray envelope with a Bug Us postcard and some RSA themed sticky notes, a printed copy of the Documentation Index (which can be downloaded here: <https://support.librariesofrsa.org/project/documentation-index/>), our new Operations Manual (downloadable here: <https://support.librariesofrsa.org/handbook/operations-manual/>), and a postcard inviting you to complete the School Cataloging Needs Survey, (a copy of which is attached to this email).

We hope you will find these items useful, and we would encourage you to Bug Us when you have questions about RSA, WorkFlows, BLUEcloud Analytics, Cataloging, or RSAcat.

Batch uploading students to WorkFlows

If you would like us to batch upload your students to WorkFlows, you just need to send an email to help@rsanfp.org with an Excel spreadsheet or a .csv file attached.

At a minimum, the file should contain the following details:

Barcode, User Profile, First Name, Middle Name or initial (if applicable), Last Name, Library, Expected Graduation Year

You can also include other information. Many of our libraries find adding a student ID number, Group ID, Preferred Name, and email address.

Before you prepare the file, you may want to read over the Patron Registration Standard for School Libraries which can be found here:

https://support.librariesofrsa.org/project/users/#Patron_Registration_Standard_for_School_Libraries.