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
			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

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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 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
			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
Independence Project							
			Key Dates in RSA's Independence Project*				2023-08-04

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
			What the RSA Independence Project (RIP) means to your Library				2023-09-26
Member Libraries							
			RAILS Delivery Codes and Labeling				2024-07-03
						RSA Library Delivery Codes	2024-04-29
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 Library Items							2019-11-22
			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

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
					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
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

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
					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
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
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							
			Back Dating Returns Using "Discharging Bookdrop"				2024-01-24

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
				Discharge Item Transit Popup Box			2017-07
				Discharging Items			2024-09-03
					Basic Workflows - Returning Materials (3 Wizards) (video 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			2024-09-03
					Renewing Materials (video 4:36)		2021-08-06
				To-Date Checkouts and Renewals			2020-01-08
Item Search Helper							
			Item Search Helper				2024-09-26
					Basic Item Search and Display (video 8:04)		2021-08-06
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
Mark Item Used Wizard							
			Mark Item Used				2015-03-25

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
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
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*	2015-05-06
						Circ Rule Helper Checklist - Printable*	2015-05-06
						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

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
CloudSource OA							
			Accessing Online Articles (aka CloudSourceOA) 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			unknown
				RSA Gmail Fact Sheet			unknown
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
				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

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
			How Holds Work				2017-08
			How Picklists Work				2021-04
			Important Things about Holds				2017-07
					Basic Holds Workshop video (58:40)		2021-07-22
					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

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
				Placing Title Level Holds			2017-07
				Sorting the Onshelf Items List			2024-10-24
				When Items are Unavailable to Fill Hold or Picklist Request			2017-07
Holds Parameters (links to Holds Parameters Page)							
						Hold Map	Monthly
						Hold Rule Helper Checklist - Printable*	2013-08-26
						Hold Rule Helper Checklist*	2013-08-26
						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

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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							
			MobileStaff				2024-09-23
				Kiosk Mode in MobileStaff			2024-09-23
				MobileStaff Installation, Activation, and Setup			2024-09-23
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
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

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
					Basic RSAcat search video (3:11)		2021-08-21
					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
		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
			Clone/Copy User Helper				2024-09-03
					Clone/Copy User Helper (video 2:01)		2020-06-12
			User Registration for Academic Libraries				2018-03
			User Registration for Public Libraries				2024-09-16
					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

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
			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
				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				2024-09-03
					Display User Wizard (video 2:40)		2021-10-27
			Intergovernmental Agreements				2019-02-28
			User Search Helper				2024-09-06
					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

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
				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
				Correcting the Pathway for Viewing and Printing Reports in WorkFlows			2024-10-18
				Entering Closed Dates in WorkFlows			2024-08-19
				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	Other (Forms and Videos)	Parameters	Last updated/ reviewed
				Turning on Tabbed Windows in WorkFlows			2024-10-24
				WorkFlows Classic Mode			2024-09-10
					WorkFlows Classic Mode (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 10				2016-08-17
			Backing Up the WorkFlows Configuration Folder on Windows 11				2024-10-16
			Replace the Workflows Configuration Folder on Windows 10				2016-08-17

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
			Replace the Workflows Configuration Folder on Windows 10				2024-10-16
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 Handbook							
	User Registration Standard for School Libraries						2024-09-09
			User Registration for School Libraries				2024-09-09
					User Registration for School Libraries (video 10:41)		2020-07-28
		Discarding a Lost Item from a Graduated Student					2024-09-11
			Welcome Back School Library Staff				2024-08-23
					WorkFlows Circulation Overview for School Libraries (video 46:15)		2020-08-31

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and 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							
		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

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
		Cataloging On Order Items					2022-10-11
		When RSA is Ready to Upgrade Your Brief item to an OCLC Record					2024-10-10
					When RSA Is Ready to Upgrade Your Brief Item to an OCLC Record (video 12:15)		2023-03-21
			Creating a Brief Record				2024-10-10
					How to Create a Brief Record with a UPC video (06:41)		2022-06-30
					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

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
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							
				Database Maintenance Reports			2024-03-22
				Tidy Cataloging Tips video (05:34)			2020-04-23
Entering Items							
		Bibload					2024-10-10
					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
		Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows					2024-10-10
		Cataloging an Item (Duplicate Copy) On a Bibliographic Record in WorkFlows					2024-10-10

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Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms and Videos)	Parameters	Last updated/ reviewed
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
					Search, Match, and Attach video (05:31)		2023-08-17
					Bibliographic Record Tidbits video (08:40)		2020-04-23
Overviews							
			Overview of the New Cataloging Process for Items without matching records				2023-03-24

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					2024-09-16
					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				2024-10-10
					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

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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					2024-10-10
					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*	2024-09-18
						Item Category 5 list*	2024-10-07
						Item Types*	2023-11-08
						Mandatory Codes for RSA Libraries	2021-08-20
						Serials Holdings Codes*	Monthly
Asterisk denotes document hosted on old support site							