

RSA Documentation for Member Libraries

Policies	Standards	Procedures	Guides	Cheat Sheets	Other (Forms, Videos, Miscellaneous)	Parameters	Last updated/ reviewed
Administration Department Documents							
About RSA							
					RSA FY24 Annual Report		2024-09-02
					A Brief History of the Resource Sharing Alliance		2022-11-29
Governance Documents							
RSA Bylaws							2024-07-01
RSA Intergovernmental Agreement							2024-07-01
RSA Intergovernmental Agreement - Exhibit A							2024-06-30
Ensuring Compliance by Member Libraries							2025-03-06
			Defining Policies, Standards, Procedures, Guides and Cheat Sheets				2025-01-30
			Implications of an RSA Member Library Withdrawing OCLC Membership				2024-03-26
			RSA System Functionality Detailed				2024-07-01
				RSA Membership Regions and Members by Region			2024-07-01
				RSA System Functionality Overview			2024-07-01
RSA Member Libraries							
		RAILS Delivery Codes and Labeling					2024-07-03
					RSA Library Delivery Codes		2025-01-22

RSA Documentation for Member Libraries

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Staff Directory							
					RSA Contact List		2025-02-17
Directors and Admin Handbook							
			RAILS / RSA What are the Differences?				2024-03-19
				Terms Used in Policies			2024-03-08
Get in Touch							
Email Forums							
			Managing your RSA IONOS Email Account				2025-02-25
			Updating your RSA Gmail Account				2025-02-25
				RSA Email Forum Memberships			2025-03-26
					RSA Email Forums Signup & Selection (form)		2025-03-26
Other Requests Forms							
					Change Contact Primary Email Account (form)		2024-05-17
					Change Your Library's Hours, Contact Info, Address and More (form)		2022-01-17
					Closure Dates 2025 (form)		2024-11-21
					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 Documentation for Member Libraries

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					RSA Training Course or Workshop Evaluation (form)		2021-02-18
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
Independence Project							
			Key Dates in RSA’s Independence Project*				2023-08-04
			What the RSA Independence Project (RIP) means to your Library				2023-09-26
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

RSA Documentation for Member Libraries

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Billing							
Fine Block Limits							2024-05-09
			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			2024-11-15
					Paying Bills in WorkFlows or Online (video 7:25)		2021-05-04
Billing Parameters							
						Bill Reasons*	2025-04-01
						Default Prices and Processing Fees*	2025-04-01
						Payment Types	2023-12-12
BLUEcloud Analytics (BCA)							
			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
			BCA User Reference				2025-01-15
				BLUEcloud Analytics - Creating a Personal View			2024-08-05
					BLUEcloud Analytics - Creating a Personal View (video 5:23)		2021-04-22

RSA Documentation for Member Libraries

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			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
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				2017-11-01
Circulation Quick Reference Guide (WorkFlows)							
			WorkFlows Circulation Quick Reference				2022-05-01
Circulation Training							
			WorkFlows Basic Circulation Workshop Guide				2024-11-18

RSA Documentation for Member Libraries

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					WorkFlows Basic Circulation Workshop (video 42:15)		2023-01-11
				Circulation Training Resources			2024-11-18
Discharge Items							
			Back Dating Returns Using "Discharging Bookdrop"				2024-01-24
			Common Pop-up Boxes				2024-11-13
				Discharging Items			2024-09-03
					Basic Workflows - Returning Materials (3 Wizards) (video 8:04)		2021-08-06
				Reshelving Location			2024-12-16
Email Receipt Buttons							
			Email Receipt Buttons				2017-12-01
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
Mark Item Used Wizard							
			Mark Item Used				2024-11-11

RSA Documentation for Member Libraries

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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*	2025-04-01
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		2022-03-01
					RSA ShoutBomb Brochure Word		2022-03-01
CloudSource OA							
			Accessing Online Articles (aka CloudSourceOA) in RSACat				2022-07-29

RSA Documentation for Member Libraries

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			Advanced Searching in Online Articles (CloudSourceOA) Search Tab				2022-08-31
				CloudSourceOA FAQ for Library Staff			2022-06-30
Interlibrary Loan and Other Resource Sharing							
		Creating and Deleting Temporary Brief Records for Non-RSA Interlibrary Loan Items				2025-03-14	
		Items requested by a Non-RSA Library				2024-03-19	
		RAILS Delivery Codes and Labeling				2024-07-03	
				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
			Running Statistics Reports for Digital Collections in Overdrive/ADML				2024-06-03

RSA Documentation for Member Libraries

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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
Lost, Missing, Damaged and LOSTTRANS Items							
Damaged Materials							2025-04-03
		Damaged Materials					2025-04-09
			Mark Item Lost Wizard				2025-04-07
			Mark Item Missing Wizard				2023-10-25
				Processing LOST-TRANS Lost In Transit Items			2025-03-21
MobileStaff							
			MobileStaff				2024-09-23
				Kiosk Mode in MobileStaff			2024-09-23
				MobileStaff Installation, Activation, and Setup			2024-09-23
Monthly Statistic Reports							
				New Format to End of Month Reports			2022-11-03
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

RSA Documentation for Member Libraries

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				Updating the Path for Viewing Printing Notices			2025-01-10
Personally Identifiable Information – PII							
Printed Documents including PII							2021-09-01
					PII Protection Library Agreement		2024-03-21
					PII Protection Staff Agreement		2024-03-21
Reports Topic Overview							
All Reports							
				New Format to End of Month Reports			2022-11-03
				New Monthly Reports			2022-08-04
RSAcat Search and Links							
				Changing PIN in RSAcat			2024-12-27
				How the RSAcat New Book Carousels work			2024-04-11
				Printing Charge History From RSAcat			2024-02-15
					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
					Intro to RSAcat (brochure)		2024-11-22
					My Account and My Lists in RSAcat (bookmark)		2024-11-21
					Searching RSAcat (tabletop)		2024-11-22

RSA Documentation for Member Libraries

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					Turning on Circulation History via RSACat (video 1:01)		2020-06-06
Sharing and Holds							
Clean Holds Shelf List							2021-09-01
In-transit Items							2021-08-05
Reciprocity							2024-05-09
			How Holds Work				2025-04-11
					Basic Holds Workshop (video 58:40)		2021-07-22
			Placing Holds				2025-04-11
					Placing Holds (video 6:53)		2021-04-13
			Placing Book Club, Classroom or Research Holds				2024-12-02
					Placing Book Club and Classroom Holds in WorkFlows (video 6:30)		2020-04-16
					Place Research Holds (video 6:15)		2020-04-16
			Processing Holds				2025-04-11
				NEWHOLDS Current Location			2025-04-21
				Processing a Hold that Shows Available but Hasn't Transited			2025-03-21
				Using a NO-TRANSIT Account			2025-01-13
					WorkFlows Onshelf Items Wizard (video 3:48)		2020-06-12
			Why didn't my patron's hold get filled by my item?				2024-12-16
				Holds Training Resources			2025-04-18

RSA Documentation for Member Libraries

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Holds Parameters							
						Hold Map	2025-04-01
						Hold Rule Helper Checklist - Printable*	2013-08-26
						Hold Rule Helper Checklist*	2013-08-26
						Membership and Holds Groupings	2022-09-20
Users							
Patron Notes							2025-01-09
			Removing a Blank Note from a User's Account				2017-12-01
Patron Registration							2024-06-04
		Enabling User Signature Uploads in WorkFlows					2024-03-12
		Institutional Cards					2024-07-23
		Registering Bloomington Public Library Users					2024-12-16
		Reciprocal Patron Deletion Form					2024-04-03
					Reciprocal Patron Deletion Form (form)		2012-03-01
			Checkout History				2022-06-01
			Clone/Copy User Helper				2024-09-03
					Clone/Copy User Helper (video 2:01)		2020-06-12
			User Registration for Academic Libraries				2018-03-01
			User Registration for Public Libraries				2024-09-16
					User Registration for Public Libraries (video 11:03)		2020-06-05
			User Registration Library Name Properties				2018-03-01
					Basic Patron Registration (video 46:10)		2024-03-26

RSA Documentation for Member Libraries

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			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
				Cards for Kids			2022-07-01
				Modify User/Preferred Name Bug			2021-08-03
				Non-Resident Library Services for Veterans			2022-03-01
				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
				User Cat 11 Meanings and When to Use them			2024-04-19

RSA Documentation for Member Libraries

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				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			2024-11-15
User Parameters							
						Mandatory User Profile Codes	2024-08-20
						User Profile Differences	2024-05-07
						User Profiles*	2025-04-01
Setup and Config Topic Overview							
WorkFlows Setup and Configuration, Receipts, Backup and Restore, Release Notes							
WorkFlows Setup and Configuration							
			Commonly Set preferences in Workflows for Circulation				2023-06-02
			Installing a Thermal Receipt Printer				2024-11-27
				WorkFlows Receipt Setup Locations			2024-11-27
			Using WorkFlows Offline Mode				2023-10-24
			WorkFlows Supervisor Set-Up				2024-11-27
				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			2018-01-01

RSA Documentation for Member Libraries

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				Patron Photos in WorkFlows			2017-11-01	
				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	
Backup and Restore WorkFlows Configurations								
			Backing Up the WorkFlows Configuration Folder on Windows 10					2024-12-02
			Backing Up the WorkFlows Configuration Folder on Windows 11					2024-10-16
			Replace the Workflows Configuration Folder on Windows 11					2024-10-16
			Replacing the Workflows Configuration Folder on Windows 10					2024-12-02
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

RSA Documentation for Member Libraries

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					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	
Bibliographic Services Department Documents								
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					2024-11-25	
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					2024-11-06

RSA Documentation for Member Libraries

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			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					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	

RSA Documentation for Member Libraries

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			Utilizing RSA’s Seed Library Broad Category Enhanced Brief Records				2025-04-11
				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						1999-05-01
Database Maintenance							
				Database Maintenance Reports			2024-03-22
					Tidy Cataloging Tips (video 05:34)		2020-04-23
Entering Items							
		Bibload					2025-04-07

RSA Documentation for Member Libraries

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					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
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			2024-12-02
					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
				Cataloging At-A-Glance			2025-04-04
Removing Items							
		Deleting Items in WorkFlows					2025-03-10

RSA Documentation for Member Libraries

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		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				2024-11-07
					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
			WorkFlows Cataloging Set-Up				2024-07-03
Transferring Items							
		Transfer Wizard					2024-10-10

RSA Documentation for Member Libraries

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					Basic Cataloging Level Transfer Wizard (video 6:28)		2016-03-14	
Updating the Path for Viewing/Printing Bibload Reports								
		Updating the Path for Viewing/Printing Bibload Reports					2025-02-06	
Cataloging Parameters								
						Home Location List*	2023-11-08	
						Item Category 1 list*	2017-12-11	
						Item Category 2 list*	2014-03-04	
						Item Category 3 list*	2025-03-03	
						Item Category 4 list*	2025-04-09	
						Item Category 5 list*	2025-04-03	
						Item Category 6 list*	2025-03-17	
						Item Types*	2023-11-08	
						Mandatory Codes for RSA Libraries	2021-08-20	
						Serials Holdings Codes*	2024-11-01	
Asterisk denotes document hosted on old support site								
Color Code key	Dropdown Item	Handbook			Topic		Primary Page	Secondary Page