RSA Operations Manual

A Guide to Basic Operations at RSA Member Libraries

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Introduction

This Operations Manual is designed to support staff who work on the front lines with patrons at RSA member libraries. At larger libraries this might include only those working at circulation or reference desks, while at some of our smaller libraries it is aimed at the solo librarian working there.

What is RSA?

The Resource Sharing Alliance (RSA) is a "multi-type" consortium of Illinois libraries that shares technology and resources to make library materials and collections available to every resident of its service area. RSA was formed in the early 1980s by libraries in central and west central Illinois to share a common library automation system. RSA facilitates sharing of materials among its member libraries providing patrons with access to materials from almost two hundred different library branches. RSA covers over 13,500 square miles of Illinois. RSA partners with Reaching Across Illinois Library System (RAILS) to provide a support staff of twelve full-time professionals.

Information about RSA, including a list of members, governance, support documents, and more can be found on our website at https://support.librariesofrsa.org/.

The RSA Service Center, located in East Peoria, supports a consortium of 134 member libraries, consisting of 98 public, 32 school, three academic, and two specialist libraries at 171 physical locations throughout 27 counties across west central Illinois.

The power of this consortium resides in resource sharing among consortium members allowing small and rural libraries of multiple types to have easy access to millions of items for their patrons.

RSA staff maintain and support a centralized, shared catalog database that includes over four million items with a patron database of over 400,000 borrowers. RSA staff provide technical support as well as software support for all consortium members, alleviating the burden of specialized IT functions on small libraries.

How is that different from RAILS?

RAILS Website (https://www.railslibraries.org/)

RAILS is our regional library system, a government agency that provides services to libraries in the northern and west-central areas of the state of Illinois. They manage delivery of materials across the northern part of Illinois and provide other services including continuing education and consulting resources to library employees and trustees, shared catalog and cataloging support, e-content services, a museum and attractions pass program, group purchases and vendor discounts, networking opportunities for library employees, and

targeted grant funding to member libraries. RAILS also supports six consortia (including RSA) with grant funding. Consortia are groups of libraries who work together usually to provide automation services and resource sharing. In Illinois, consortia are referred to in statute as Local Library System Automation Programs (LLSAPs). LLSAPs were originally developed to assist local library collection management, sharing resources, and provide cost effective automation services. The Administrative Rules governing LLSAPs can be found here: https://www.ilga.gov/commission/jcar/admincode/023/023030300B02150R.html.

You can access links to trustees training, information about FOIA and OMA (Open Meetings Act), and other Library Law information. RAILS also hosts many email lists: https://railslibraries.org/networking/email-lists.

A document can be found describing the main differences between RAILS and RSA in terms of governance, organization, and functionality here.

What is WorkFlows?

RSA uses the SirsiDynix **Symphony** Integrated Library System (ILS). This database underlies all the various programs for staff and patron access. Staff use **WorkFlows** for circulation, cataloging & serials management, reports, acquisitions, academic reserves management, among many other functions. Library staff can also use **SymphonyWeb** to access most of the functions of WorkFlows through a web browser.

What is BLUEcloud?

BLUEcloud is a SirsiDynix term used to identify a group of software products that are intended to be updated frequently and to be more responsive to libraries' needs. It is considered a next generation library management service (LMS).

RSA is already using BLUEcloud

- Mobile Staff: circulation functions on a tablet
- BLUEcloud Analytics (BCA): web-based reporting
- BLUEcloud Circ: expected to be available in 2025

BLUEcloud Analytics is the software that we use for statistics. Monthly statistics are sent to your library IONOS account at the beginning of each month. More are available on the RSA Support Site under Monthly Statistical Reports. RSA offers BLUEcloud Analytics training so you can run your own statistical reports; check L2 for training events. There are also four Report Request forms on the RSA Support Site, where you can tell us what information you need and we can run requested reports for you.

Support from RSA

RSA's Support Site (https://support.librariesofrsa.org/)

This is the website for Resource Sharing Alliance, your Local Library System Automation Program. Here you can find WorkFlows information including policies and standards, as well as guides and cheat sheets for using WorkFlows and BCA, and information about our various committees as well as agendas and meeting minutes.

The RSA Support Site also includes a Documentation Index which lists by type all the documentation that RSA has created. The Documentation Index can be found [here](#).

Report request forms can be accessed [here](#). RSA also has a [YouTube Channel](#) where we post recordings of meetings as well as videos demonstrating various WorkFlows functions and recordings of past circulation training sessions.

RSA's Help Desk

You may contact us at 866-940-4083 or email the RSA Help Desk at help@rsanfp.org.

Add here

RSA IONOS Email Accounts

This is an email account that RSA has set up for each library. This is where your End of Month statistical reports and your daily picklists are sent. Members may change the password to this account. If they get locked out, they can contact the RSA Help Desk, and we can reset it for them. There is a guide to managing these accounts [here](#).

RSA Email Forums

RSA uses an email list solution, Simplelists, to send announcements to staff at member libraries, as well as to provide forums for staff to share information amongst them. Emails sent from each of these forums are sent from an address ending with [librariesofrsa.simplelists.com](#). There are forums for Directors, Public Library Staff, School Librarians, for circulation and cataloging staff, policy, BCA reports, and RSAcat. There is also a forum for any Library-to-Library Announcements and one for each of RSA's regions. You can sign up for these email forums using this [form](#). A complete list can be found [here](#).

ADML (Libby / Overdrive Marketplace)

https://support.librariesofrsa.org/project/adml/ for information about ADML

https://marketplace.overdrive.com/Account/Login to manage your Overdrive/ADML account.

ADML (Alliance Digital Media Library) is a shared collection of eBooks and eAudio titles funded by central Illinois libraries that is accessed by patrons through the Libby app. ADML is separate from RSA, but RSA collects membership dues and provides some support to ADML member libraries.

Various statistics are available in the Overdrive Marketplace under the Insights tab. A guide to running those statistics can be found here. In addition, patron barcodes can be merged when they get a new library account, and support tickets may be initiated at this site.

- Username: alliance.lib.library-code
- Password: RSA does not have access to passwords, but if you go to the link above and enter the username, then select "Forgot my Password," a reset link will be sent to your email.
- Libraries have the option to create an Advantage collection, which consists of titles for exclusive use by your patrons. Advantage titles and ADML titles will appear together within the Libby app. If the library chooses to participate in Advantage Plus, titles you opt to share may be checked out by any ADML user, though your library cardholders have priority for holds.
- Titles for the shared ADML collection are chosen by a selection committee. For more information or to make title suggestions you will first need to register for the ADML mail list. Sign up here: https://form.jotform.com/RSAnfp/rsa-email-groups. Once signed up you can email the group at: ADML@librariesofrsa.simplelists.com.

eRead IL / Boundless (formerly Axis 360)

https://ereadillinois.com/

eRead Illinois is a cooperative program that expands access to eBooks for Illinois residents and is a service of RAILS. RSA has developed a guide to running statistical reports in the eRead Illinois platform which can be found here. The following resources are available to help you with this service:

- Contact: info@ereadillinois.com.
- Support: https://ereadillinois.com/support.
- Baker & Taylor support ticket (for library staff only): https://bakerandtaylor.tfaforms.net/40.
- Boundless Webpage Library Selector: https://ereadil.boundless.baker-taylor.com/Consortia/PickLibrary?returnUrl=%2F.

How can I get involved in RSA?

Serve on the Board

Effective July 1, 2024, RSA converted into an Illinois Intergovernmental Instrumentality (III). RSA has a 12-member board representing member libraries of diverse types, sizes, and regions within our geographic area. A rebate of $1,000 per year is available to the libraries whose staff are elected to RSA's board. Board members are elected to serve a four-year term. More information about the board can be found here.

Serve on the DAC, or attend DAC meetings

You can also volunteer to serve on the Directors Advisory Council. The primary purpose of the Directors Advisory Committee is to gather feedback, present plans, policy updates, share and gather strategic plan ideas, and comment on the operations of RSA. This Committee is the primary feedback mechanism for Directors to share directly with the Board. The committee is made up of the RSA Board President, one other RSA Board member, and five (5) appointed library directors. Appointed members serve two (2) year terms. More information can be found about the DAC here.

Host a meeting

As an III, RSA's Board and DAC meetings are subject to the Open Meetings Act and must be held in person. If your library has a suitable ADA compliant space, you can volunteer to host one of our meetings.

Request a site visit

Each RSA library is required to participate in an in-person site visit once every 18 months. The visit will be conducted by either RSA Cataloging or Operations staff. A library may request a site visit before they are visited under the routine site visit program.

Click on this link https://form.jotform.com/RSAnfp/RSAsite-visit-request and fill out the form. You can request a visit from either the Operations team or the Cataloging team.

Attend our Membership Chats

RSA holds regular Membership Chats which have replaced RSA's old committees. These chats are held via Zoom. Membership Chats are recorded and can be found here. Details of Membership Chats can be found on L2.

Join our Email Forums

A list of our Email Forums along with instructions on how to sign up for them can be found here. If you want a new forum that does not already exist, just email us at help@rsanfp.org and let us know. Fill out our form to subscribe to our email forums. The form can be found here: https://form.jotform.com/RSAnfp/rsa-email-groups.

Use the RSA Support Site

There are over two hundred support documents on the RSA Support Site https://support.librariesofrsa.org/. There is a downloadable Documentation Index in which you can search for topics of interest or browse through them. User "CTRL F" to search. If you do not see the documentation you need, email the RSA Help Desk at help@rsanfp.org and let us know what you need. Staff may be able to find the help you need or create new documentation for the issue you are having.

Contact the RSA Help Desk

If you need assistance with anything to do with WorkFlows or BCA, or have more questions about RSA, the easiest way to be involved is to contact the RSA Help Desk. Simply send an email to help@rsanfp.org. RSA staff will quickly respond to your questions and requests.

Circulation Quick Reference for Front Line Staff

The various circulation functions performed by staff at RSA member libraries are the key to high quality patron interactions. Taking care to perform these functions accurately will allow your patrons to check out and check in materials while being able to access a list of checkouts in their RSAcat account. It also allows for proper management of your library's collection.

If you have questions about circulation, please do not hesitate to contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083. The RSA Operations Department is happy to assist you!

Billing

The RSA Support Site has a page dedicated to helping library staff deal with all aspects of Billing, which can be found here: https://support.librariesofrsa.org/project/billing/.

Billing in WorkFlows is governed by the Fine Block Limits Policy which discusses the standard cumulative fine block limit, when fines may be kept by the receiving RSA library, and how to treat payments for lost items.

A good starting point for training on Billing issues is the Billing Training Resources Cheat Sheet. This document contains a list of the most helpful cheat sheets, guides, and videos which address Billing. We recommend that both seasoned and inexperienced staff spend time familiarizing themselves with the resources listed in this document.

Lost, Missing, Damaged and LOSTTRANS items:

In 2025, the RSA Board adopted two new policies which lay out how member libraries should deal with Lost and Damaged Items belonging to other RSA libraries. There is a page on the RSA Support Site which includes these policies and accompanying procedures which explain how to implement the policies in the ILS. The page can be found here.

Circulating materials

The RSA Support Site has a wealth of resources to help staff at member libraries with circulating materials to their borrowers. The Circulation Handbook, which contains links to all these resources, can be found here:

https://support.librariesofrsa.org/handbook/circulation/.

There are specific sections of the Circulation Handbook for the major functions of circulating materials:

Checking out:
> https://support.librariesofrsa.org/handbook/circulation/#Check_Out

Discharging items:
> https://support.librariesofrsa.org/handbook/circulation/#Discharge_Items_Check_In.

Item Renewal:
> https://support.librariesofrsa.org/handbook/circulation/#Item_Renewal

An overview of Circulation Functions:
> https://support.librariesofrsa.org/handbook/circulation/#Circulation_Overview

Circulation Parameters:
> https://support.librariesofrsa.org/handbook/circulation/#Circulation_Parameters

A good place to start is our video: Basic Circulation Workshop. This video is approximately 40 minutes long and provides a good overview of the basics of circulation in WorkFlows.

Creating a brief record for a non-RSA interlibrary loan item

Follow the instructions in the Creating and Deleting a Temporary Record for a Non-RSA Interlibrary Loan Item Procedure if you have an interlibrary loan item from outside RSA (e.g., OCLC WorldShare or Find More Illinois) that you want to catalog in WorkFlows to track the checkout. Creating brief records for interlibrary loan items should be completed using your library's CIRC or ICA account. It should be noted that the message "Leave as Brief" should be entered into the 592 field when these records are created, as the 592 field is what RSA's cataloging team uses to identify brief records that need to be upgraded to OCLC records. DO NOT FOLLOW THESE STEPS to quickly add records for items in your permanent collection.

Sharing and Holds

There is a page dedicated to helping library staff with Holds. This page can be found here: https://support.librariesofrsa.org/project/holds/.

Sharing and Holds between RSA Libraries are governed by the Sharing and Holds Policy.

There is also a primer document, the Holds Training Resources Cheat Sheet, providing links to the most helpful cheat sheets, guides, and videos which address Holds. We recommend that both seasoned and inexperienced staff spend time familiarizing themselves with the resources listed in this document. We also have a Basic Holds Workshop video which can be viewed here.

Reports

A good starting point for exploring the reporting functions that are available can be found here: https://support.librariesofrsa.org/project/all-reports-pages/.

The use of reports is governed by the Printed Documents Including Patron PII Policy and the accompanying Library and Staff Agreements. If any member of staff at your library wants to access BCA reports containing Personally Identifiable Information RSA must have a BCA PII Library Agreement signed by the Library's Director and BCA PII Staff Agreement signed by each staff member who needs access to those kinds of reports. In addition, a library must inform RSA if a staff member who has access to these reports leaves the library.

More detailed information on reports and links to many existing reports can be found on these pages:

BLUEcloud Analytics:
https://support.librariesofrsa.org/project/bluecloud-analytics/

Monthly Statistic Reports:
https://support.librariesofrsa.org/project/monthly-reports/

System Generated Reports:
https://support.librariesofrsa.org/project/system-gen-reports/

RSA staff have also created a collection of interactive dashboards which can be used to analyze collection, holds, checkouts and renewals, and transit data. These dashboards can be found here. These dashboards require a BCA login and password.

User registration and maintenance

Documentation on User Registration and Maintenance can be found at:

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

How to manage registration and maintenance of User cards is governed by four RSA policies. The Patron Registration policy explains how new patrons must be entered into the RSA database. The User Cards policy lays out rules for the following individuals: staff, teachers and students, residents, and non-residents and includes references to a section of the Illinois Administrative Code. The Patron Notes policy describes how patron notes must be entered into the RSA database and the Retention Schedule for Expired Patron Cards discusses retention schedules for unencumbered (with no bills outstanding) expired patron cards, expired patron cards with less than $25.00 in bills, and expired patron cards with $25.00 or more in bills.

There is a primer document, the User Registration Training Resources Cheat Sheet, which lists the most useful documentation relating to User Maintenance and Registration.

School Handbook

RSA staff have developed a School Handbook which contains all of the documentation expressly intended for staff at schools. The School Handbook can be found here. Staff at RSA Member School Libraries are encouraged to contact RSA if they need further documentation or support.

What's Next?

RSA Circulation Workshops

Check the L2 calendar for current offerings of Circulation Workshops.

RSA training:

> Basic WorkFlows Circulation Workshop – The Basic Circulation Workshop covers the circulation module in Symphony WorkFlows for new library employees or seasoned employees who would like a refresher course. This workshop does not include the Holds wizards.
>
> Basic WorkFlows Holds Workshop – The Holds Workshop covers the wizards related to Holds in Symphony WorkFlows for new library employees or seasoned employees who would like a refresher course. This workshop is intended for staff from full and basic online members of the Resource Sharing Alliance, NFP.
>
> RSA Virtual Office Hours – Member Services is your opportunity to ask them. Drop by the Zoom meeting and one of RSA's Member Services Staff will be online to chat with you about circulation topics. Ask a question, get feedback on a procedure, brainstorm a solution...whatever is on your mind. Stay for the hour or leave once you have your answer. It is up to you!

RSA Operations Department Site Visits

An Operations Department Site Visit is the perfect opportunity for libraries and RSA staff to connect, discuss helpful topics, and answer any questions the library may have about notices, circulation and hold rules, inventory, pick lists, billing, discard users, reports, or anything else operations related.

Operations Department Site Visits may be made in-person at the library or via Zoom, whichever works best for the library. Request a Site Visit here:

https://form.jotform.com/RSAnfp/RSAsite-visit-request.

Cataloging Quick Reference for Front Line Staff

Accurate, correct cataloging is crucial because it serves as the foundation for finding items in WorkFlows and RSAcat.

RSA libraries are required to adhere to the [RSA Bibliographic Database Standards](#), as outlined in the [Bibliographic Database Policy](#).

If you have questions about cataloging, please do not hesitate to contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083. The RSA cataloging department is happy to assist.

WorkFlows cataloging access

To catalog in WorkFlows, RSA requires an Individual Cataloger Account (ICA) configured for the specific library staff member based on their training, experience, and cataloging responsibilities. RSA issues ICAs to library staff after they complete basic WorkFlows cataloging training provided by RSA or internal cataloging training provided by fellow staff at their library. ICAs are also issued to library staff during RSA cataloging site visits.

To request an Individual Cataloger Account (ICA), please submit the [Add or Remove a Staff Account form](#). RSA will create the ICA and follow up with you to share the user ID and pin.

Some library staff continue to use the technical services (TECH) account to catalog in WorkFlows and have not yet been issued ICAs. The user ID for the TECH account is your WorkFlows library code found [here](#), directly followed by TECH. RSA plans to phase out all TECH accounts in favor of ICAs.

All ICAs are configured to include access to at least the basic level, which involves cataloging items in WorkFlows using existing bibliographic records, editing existing items, creating brief bibliographic records for items that lack existing matching records, and deleting items.

ICAs may also include access to the following cataloging levels depending on the experience, training, and needs of the specific staff members:
- The batch editing level, which involves using the Item Group Editor wizard to batch edit item information (e.g., home location, item type) on a widespread scale in WorkFlows.
- The OCLC cataloging level, which involves searching OCLC WorldCat via Connexion Client or Record Manager to find bibliographic records for items without existing matching records in WorkFlows, then loading those records into WorkFlows with the library's call number/item information attached so they are visible in the RSAcat.

Noted below each task is the WorkFlows access level necessary to perform that task. Please note that some tasks can be performed using circulation (CIRC), TECH, or an Individual Cataloger Account. For more information about cataloging levels, please refer to the Core Competencies for Cataloging Staff at RSA Member Libraries.

Match and attach to catalog your item in WorkFlows

Follow the instructions in the Add a Call Number / Brand New Item Cheat Sheet if you need to catalog an item in WorkFlows and there is an existing bibliographic record that matches it. You will attach your item to that record.

An Individual Cataloger Account configured to the basic level, or a TECH account is required to perform this task.

Create an "on the fly" (OTF) brief record

Follow the instructions in the Adding Brief Title Helper Guide to catalog an item "on the fly" if you are trying to check it out to a patron, but WorkFlows gives you an "item not found in the catalog" message.

An Individual Cataloger Account configured to the basic level, a TECH account, or a CIRC account is required to perform this task.

Check out a weeded item to your discard user

Follow the instructions in the Discard User Procedure to check out an item you will no longer keep in the collection to your discard user. RSA automatically removes items checked out to your discard user during the first week of each month.

An Individual Cataloger Account configured to the basic level, a TECH account, or a CIRC account is required to perform this task.

Report an item on the wrong record to RSA for correction

Follow the instructions in the Reporting Cataloging Issues to RSA Procedure if you receive an item in delivery to fill a hold, but you notice the item is cataloged on the wrong record (e.g., Blu-ray instead of DVD, regular print instead of large print).

There is no need for an Individual Cataloger Account, TECH, or CIRC account, to perform this task.

Scan items to edit their WorkFlows cataloging codes

Follow the instructions in the Global Item Modification (GIM) Wizard Cheat Sheet, scanning an item's barcode into the wizard to change its home location, item type, item categories, or

price. GIM is especially helpful for editing no longer "new items" from a "new item" type or new home location to the standard item type or home location when your library no longer considers those items new.

An Individual Cataloger Account configured to the basic level, a TECH account, or a CIRC account with an override pin for GIM is required to perform this task. Please contact the RSA Help Desk if your library needs an override pin to access GIM from the CIRC account.

What's next?

Cataloging Handbook
The Cataloging Handbook on the RSA Support Site contains lots of helpful information about cataloging and is a great place to start:

Do you need help cataloging your item?
Check out this page on the RSA Support Site to learn your next steps:
      https://support.librariesofrsa.org/project/need-help-cataloging-your-item/

RSA Cataloging Workshops
Check the L2 calendar for current offerings of Cataloging Workshops.

RSA training:

- Basic WorkFlows Cataloging Workshop – Taught monthly, this workshop covers core WorkFlows cataloging functionality (i.e., add, edit, delete) and is helpful for new catalogers or existing catalogers in need of a refresher.
- Bibload Workshop – Taught every other month, this workshop focuses on how to use OCLC Connexion Client to make bibliographic records usable for RSA. Your library must be an OCLC member to participate in this workshop.
- Item Group Editor Training – Taught in-person at the library, this training discusses how to use the Item Group Editor wizard to search for a group of items in the collection and then make changes to all of those items in a single batch.

RSA Cataloging Site Visits
A cataloging site visit is the perfect opportunity for libraries and RSA staff to connect, discuss helpful cataloging topics, and answer any questions the library may have about brief records, cataloging parameters, or anything else cataloging related. Please note that site visits differ from cataloging training. Request a cataloging site visit here:
https://form.jotform.com/RSAnfp/RSAsite-visit-request.

Suggested tasks to be performed on a regular basis

These suggested tasks are not intended to replace the policies or procedures you have in your own libraries. They are instead meant as a list of useful ideas to help you supplement your procedure and to ensure the smooth running of your library.

Daily / As Needed tasks

- Consider an "Opening" and "Closing" checklist for your staff that is specific to your library. That way, no matter which staff member opens or closes, all the appropriate tasks will be completed.
- Balance your cash box/money drawer.
- Empty bookdrop and discharge/check in items.
    - o Use discharging bookdrop to backdate returns.
- Check RSA IONOS.
- Clean Holds Shelf Report.
- Pick list – pull holds requests at least once per day that the library is open.
    - o Discharge or trap items and place them on hold shelf or fill out transit slip.
- Check 5am, 12pm, and 4pm holds lists sent by email, or the 5am, 10am, 12pm, 2pm, and 4pm on the Onshelf Items Wizard.
- Delivery days – discharge all items from blue bin.
- Check Overdue and Billing Notices in WorkFlows.
    - o Look for overdue items on shelf.
    - o Discharge if found.
- Depending on individual library procedures:
    - o Print bill notices that are to be mailed (for items not found on shelf).
    - o Users with emails entered in WorkFlows will receive email notices.
- Complete and submit Reciprocal Deletion forms as needed.
- Delete previous patrons as reciprocal deletion forms are received.
- Add notes to patron accounts for returned mail as it comes in.

Weekly tasks

- Log into your RSA IONOS account. Find emails that have been "bounced back" from the automatic report emails. Look up these emails/patrons in WorkFlows and add a note requesting an updated email.

Monthly tasks

- Gather statistics that you need to report on the IPLAR, so that it is easier at the end of the year (Wi-Fi usage, circulation stats, CE for staff, non-library meeting room use,

database statistics, programming statistics, curbside service, reference questions, one-on-one tech assistance).

- Pull a list of all your library's missing items. Look for it every month.
- Search your library's Lost Transit User on WorkFlows. Have staff search for each item checked out for longer than 2 months. If not found, mark it missing.
- Review new patron cards that were created last month. Correct any mistakes.
- Pending transits – Process the report received the first of the month called "Long Transit Pre-cleanup Report - items in transit 45 days or more." Note that items only appear in this report when they first go to LOSTTRANS status and will stay in that status until they are discharged or discarded. See the [Processing 'Found' LOSTTRANS Items Cheat Sheet.](#) If the item is not found on your shelf, contact the transit library listed in the report. Make sure to check the hold shelf at both libraries, as expired holds will go to in transit status.

Every six months

- On this month's missing items list, withdraw from the collection the ones that a) are not currently checked out to anyone and b) have been missing for more than 18 months.
- Through BCA, pull reports that list all users with contact information, profile, ID number, expiration date, birth date, and email address. Sort through lists, find problems and errors, and fix them.
- Clean out your break room refrigerator.

Annual tasks

- Perform staff reviews.
- Perform annual or rolling Inventory of entire library collection.
- Through BCA, pull entire shelf list. Sort, find errors, and fix them.
- Look up in https://icash.illinoistreasurer.gov/ to see if your library is owed any money.
- Delete expired user cards according to the [RSA Retention Schedule for Expired Patron Cards Policy](#) and the Local Records Unit records retention schedule for your library. Member libraries can request batch deletes of users by submitting a ticket at [help@rsanfp.org.](mailto:help@rsanfp.org)
- Weed your collections according to established procedures at your library. RSA recommends using a Discard User. Consult the [Discard Procedure](#) for instructions on using a Discard User. Discard Users have been created for all RSA member libraries. If you do not know what your Discard User ID is, contact [help@rsanfp.org.](mailto:help@rsanfp.org)
- Certification / IPLAR / ILLINET / Non-Resident update.

- Enter closed dates in WorkFlows. Read through the [Entering Closed Dates into WorkFlows Cheat Sheet](#) for instructions. They should also be entered in L2 (https://librarylearning.org/).
- Apply for Public Library Per Capita and Equalization Aid Grants. Check the deadline on the State Library website:
    https://www.ilsos.gov/departments/library/grants/plpc_equalization.html.
- Update trustee info on L2 and website (as necessary).
- Update bulletin board with required government documents.

Skills Checklist

The following lists are only RSA's recommendations. The applicability of these items may vary based on your library policies, procedures, and your position there.

Basic Recommendations

1. Know how to login to WorkFlows.
2. Know how to access common tasks wizard.
    a. Checkout – be able to check an item out to a patron.
    b. Discharge – be able to return an item.
    c. Item Search and Display – be able to look up an item in the system.
3. Know how to access Users wizard.
    a. Display User – be able to search for patron's account with and without User ID.
    b. User Registration – how to sign a patron up for a library card.
    c. Modify User – be able to modify a person's library card.
4. Know how to access Holds Wizard.
    a. Place Hold – be able to place a hold.
    b. Trap Hold – be able to trap a hold.
    c. Onshelf Items – be able to look up what items are on hold.
5. Know how to contact RSA Help Desk – help@rsanfp.org.
6. Know how to contact RAILS RSA Help Desk for delivery support: railsdelivery@railslibraries.org.
7. Recognize temporary (on-the-fly) records, and understand their uses, such as on-order records for acquisitions and temporary records created to circulate items that are not linked in the catalog.
8. Print and process Overdue and Billing Notices.

Intermediate Recommendations

1. Know how to sign up for an L2 account.
    a. Be familiar with the Directory of libraries.
    b. Be familiar with Events for Continuing Education and committee meetings.
2. Know how to subscribe to the RSA email lists.
3. Know how to conduct a thorough search in Item Search and Display using the index and featured search options.
4. Be familiar with https://support.librariesofrsa.org/ and what information can be found on that site.
5. Be familiar with the documentation on the RSA Support Site pertinent to your area of responsibility.
6. Be able to create temporary (on-the-fly) records.

7. Identify monthly reports that are emailed out and what follow-up is needed. Follow-up may include any user profiles that need to be changed, missing in transit items, and any lost or missing items that need to be located or discarded.
8. Being able to go through basic training for BCA and running reports as needs.
9. Be able to find statistics for Illinois State Library reports like IPLAR and ILLINET.

Expert Recommendations

1. Be able to access the circulation map of your library's items.
2. Be able to download and install WorkFlows software from the RSA Support Site.
3. Know how to request parameter changes for your library, such as the Circulation Map, the Hold map, Default prices, User profiles, Changes to notices including Lost and Billing notices.
4. Be able to modify WorkFlows client configuration settings using WorkFlows Preference menu (barcode scanner, receipt printer).
5. Understand the impact of reciprocity (user library and item library).
6. Understand the impact of changes to circulation policies on other RSA member libraries.
7. Be able to customize reports in BLUEcloud Analytics and understand Save and Save As or Personal View.
8. Understand how circulation policies in WorkFlows govern system operations.
9. Understand how to use and manage reports posted to the RSA Support Site.
10. Use the emailed BCA Monthly Statistics to complete annual reporting and board reports as needed.
11. Find records not in WorkFlows in OCLC Connexion.
12. Use Item Group Editor.

Other useful resources

These are resources provided by organizations other than RSA.

L2 a.k.a. Library Learning (https://librarylearning.org/)

This is the statewide library directory and event calendar. We strongly recommend that every library staff member creates an account on L2. RSA and other organizations post their events there. L2 is also where libraries complete their mandatory annual certification, and where public libraries are required to post their non-resident policy and fees on an annual basis.

Illinois State Library (https://www.ilsos.gov/departments/library/libraries/home.html)

The State Library's webpage. Here you can find information about Library Law, Trustee information, grants, and information about the annual certification and surveys that Illinois Libraries need to complete.

Illinois Library Association (ILA) (https://www.ila.org/)

The Illinois Library Association's website. ILA hosts an annual conference and Reaching Forward Illinois, a conference for library support staff. They also have a summer reading program, iREAD, which provides a theme and resource guides for a summer reading program. Some libraries elect to participate in the iREAD themes, but many others go their own way and develop their own Summer Reading theme and plan.

The Association of Illinois School Library Educators (AISLE) (https://aisled.org/)

AISLE states that its mission is to promote life-long learning by the students of Illinois, AISLE will provide leadership and support for the development, promotion, and improvement of the school library media profession and programs in Illinois.

Association for Rural and Small Libraries (ARSL) (https://www.arsl.org/)

ARSL states that it proudly supports and represents rural & small library staff. ARSL builds strong communities through advocacy, professional development, and elevates the impact of rural and small libraries.

Explore More Illinois (https://exploremoreillinois.org/)

Explore More Illinois is a free service provided by RAILS that provides instant online access to free and discounted tickets to museums, science centers, sporting events, zoos, park districts, theatres, and other fun and local cultural venues with a valid library card. Choose your library from the list for your website: https://exploremore.quipugroup.net/.

Index of documents linked from the Operations Manual

This list of the documents linked from within the text of the Operations Manual is included to provide a convenient way of finding them. They appear in this list in the order they are first referred to in the text. Dates in parentheses are the last time the document was updated.

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Managing your RSA IONOS Email account Guide: (June 6, 2025):

https://support.librariesofrsa.org/wp-content/uploads/2025/06/Managing-Your-RSA-IONOS-Email-Account-Guide-2025-06-06.pdf

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RAILS and RSA – What are the differences (March 19, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/04/RAILS-and-RSA-differences-2024-03-19.pdf

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Documentation Index (April 21, 2025):

https://support.librariesofrsa.org/project/documentation-index/

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Running Statistics Reports for Digital Collections in Overdrive/ADML (Alliance Digital Media Library) Guide (June 3, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/06/Running-Statistics-Reports-for-Digital-Collections-in-Overdrive-ADML-Guide-2024-06-03.pdf

Retrieving Statistics for Digital Collections in eRead Illinois/Boundless Guide (June 3, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/06/Running-Statistics-Reports-for-Digital-Collections-in-eRead-Illinois-Guide-2024-06-03.pdf

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Printed Documents Including Patron PII Policy (September 1, 2021)

https://support.librariesofrsa.org/wp-content/uploads/2022/03/Printed_PII_2021.pdf

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Fine Blocks Policy (May 9, 2024):

https://support.librariesofrsa.org/project/billing/#Fine_Block_Limits_Policy

Billing Training Resources Cheat Sheet (November 15, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/11/Billing-Training-Resources-Cheat-Sheet-2024-11-15.pdf

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Creating and Deleting a Temporary Record for a Non-RSA Interlibrary Loan Item Procedure (May 10, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2025/03/Creating-Deleting-Temporary-Brief-Records-for-ILL-items-Procedure-2025-03-14.pdf

Sharing and Holds Policy (June 6, 2025)

https://support.librariesofrsa.org/wp-content/uploads/2025/06/Sharing-and-Holds-Policy-2025-06-05.pdf

Printed Documents including Patron PII Policy (September 1, 2021):

https://support.librariesofrsa.org/wp-content/uploads/2022/03/Printed_PII_2021.pdf

Sharing and Holds Training Resources Cheat Sheet (April 18, 2025):

https://support.librariesofrsa.org/wp-content/uploads/2025/04/Sharing-and-Holds-Training-Resources-Cheat-Sheet-2025-04-18.pdf

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BCA PII Library Agreement (March 21, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/03/BCA-PII-Library-Agreement-2024-03-21.pdf

BCA PII Staff Agreement (March 21, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/03/BCA-PII-Staff-User-Agreement-2024-03-21.pdf

Patron Registration Policy (June 4, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/06/Patron-Registration-Policy-2024-06-04.pdf

Patron Cards Policy (August 1, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/08/Patron-Cards-Policy-2024-08-01.pdf

Patron Notes Policy (January 9, 2025):

https://support.librariesofrsa.org/wp-content/uploads/2025/03/Patron-Notes-Policy-2025-01-09.pdf

Retention Schedule for Expired Patron Cards Policy (August 9, 2023):

https://support.librariesofrsa.org/wp-content/uploads/2023/08/Retention-Schedule-for-Expired-Patron-Cards-Policy-2023-08-09.pdf

User Registration Training Resources Cheat Sheet (November 15, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/11/User-Registration-Training-Resources-Cheat-Sheet-2024-11-15.pdf

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Core Competencies for Cataloging Staff at RSA Member Libraries (June 29, 2022):

https://support.librariesofrsa.org/wp-content/uploads/2022/12/RSA_Cat_Competencies_2022-06-29.pdf

Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows Procedure (October 10, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/10/Cataloging-a-Call-Number-Brand-New-Title-Procedure-2024-10-10.pdf

Creating a Brief Record (May 22, 2025):

https://support.librariesofrsa.org/wp-content/uploads/2025/05/Creating-a-Brief-Record-Guide-2025-05-22.pdf

WorkFlows Discard User Procedure (September 16,2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/09/Discard-User-Procedure-2024-09-16.pdf

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Reporting Cataloging Issues to RSA Procedure (May 23, 2025):

https://support.librariesofrsa.org/wp-content/uploads/2025/05/Reporting-Cataloging-Issues-Procedure-2025-05-23.pdf

Global Item Modification Wizard Cheat Sheet (June 9, 2022):

https://support.librariesofrsa.org/wp-content/uploads/2022/12/GIM_Cheat_Sheet_06.09.22.pdf

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Processing LOST-TRANS Lost in transit Items Cheat Sheet (March 21, 2025):

https://support.librariesofrsa.org/wp-content/uploads/2025/03/Processing-LOST-TRANS-Lost-in-transit-items-Cheat-Sheet-2025-03-21.pdf

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Entering Closed Dates into WorkFlows Cheat Sheet (August 19, 2024):

https://support.librariesofrsa.org/wp-content/uploads/2024/08/Entering-Closed-Dates-in-WorkFlows-Cheat-Sheet-2024-08-19.pdf

Operations Manual Working Group Members

This Manual was initially developed over a six-month period with the input of the volunteers from RSA member libraries who made up the Operations Manual Working Group.

Hillary Dillon, Circulation Supervisor, Galesburg Public Library

Nick Hulva, Circulation Manager, Fondulac Public Library District

Laura Keyes, Director, Dunlap Public Library District

Ronnie Parrone, CTS Manager, Washington District Library

Lori Priebe, Director, Danvers Township Library

Barb Tarbuck, Director, H.A. Peine District Library

Victoria Volckmann, Assistant Director, Pekin Public Library

Greg Weydert, Director, Creve Coeur Public Library District