

## RSA Documentation for Member Libraries

| Policies                                                | Standards | Procedures | Guides | Cheat Sheets                                                 | Other (Forms, Videos, Dashboards, Miscellaneous)                 | Parameters | Last updated/<br>reviewed |
|---------------------------------------------------------|-----------|------------|--------|--------------------------------------------------------------|------------------------------------------------------------------|------------|---------------------------|
| <b>Administration Department Documents</b>              |           |            |        |                                                              |                                                                  |            |                           |
| <a href="#">About RSA</a>                               |           |            |        |                                                              |                                                                  |            |                           |
|                                                         |           |            |        | <a href="#">RSA Contact List</a>                             |                                                                  |            | 2025-09-26                |
|                                                         |           |            |        |                                                              | <a href="#">A Brief History of the Resource Sharing Alliance</a> |            | 2022-11-29                |
|                                                         |           |            |        |                                                              | <a href="#">RSA FY24 Annual Report</a>                           |            | 2024-09-02                |
|                                                         |           |            |        |                                                              | <a href="#">What are the Benefits of Being in RSA?</a>           |            | 2025-03-18                |
|                                                         |           |            |        |                                                              |                                                                  |            |                           |
| <b>Bug Us Materials</b>                                 |           |            |        |                                                              |                                                                  |            |                           |
|                                                         |           |            |        |                                                              | <a href="#">Please Bug Us</a>                                    |            | 2024-07-01                |
|                                                         |           |            |        |                                                              | <a href="#">Please Bug Us - Cataloging</a>                       |            | 2024-10-01                |
|                                                         |           |            |        |                                                              | <a href="#">Please Bug Us - Operations</a>                       |            | 2025-01-01                |
|                                                         |           |            |        |                                                              | <a href="#">Please Bug Us - Reports</a>                          |            | 2025-04-01                |
|                                                         |           |            |        |                                                              |                                                                  |            |                           |
| <b>Governance Documents</b>                             |           |            |        |                                                              |                                                                  |            |                           |
| <a href="#">RSA Bylaws</a>                              |           |            |        |                                                              |                                                                  |            | 2024-07-01                |
|                                                         |           |            |        | <a href="#">RSA Membership Regions and Members by Region</a> |                                                                  |            | 2025-07-01                |
|                                                         |           |            |        |                                                              | <a href="#">RSA Day Committee Charge</a>                         |            | 2025-08-07                |
| <a href="#">RSA Intergovernmental Agreement</a>         |           |            |        |                                                              |                                                                  |            | 2024-07-01                |
|                                                         |           |            |        |                                                              | <a href="#">RSA Intergovernmental Agreement - Exhibit A</a>      |            | 2024-06-30                |
| <a href="#">Board Electronic Attendance</a>             |           |            |        |                                                              |                                                                  |            | 2024-07-17                |
| <a href="#">Ensuring Compliance by Member Libraries</a> |           |            |        |                                                              |                                                                  |            | 2025-03-06                |
| <a href="#">Public Comments at Meetings</a>             |           |            |        |                                                              |                                                                  |            | 2024-07-17                |

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| Policies                                                             | Standards | Procedures | Guides                                                                                                | Cheat Sheets                                      | Other (Forms, Videos, Dashboards, Miscellaneous) | Parameters | Last updated/<br>reviewed |
|----------------------------------------------------------------------|-----------|------------|-------------------------------------------------------------------------------------------------------|---------------------------------------------------|--------------------------------------------------|------------|---------------------------|
| <a href="#">RSA Expectations &amp; Responsibilities</a>              |           |            |                                                                                                       |                                                   |                                                  |            | 2025-06-05                |
| <a href="#">RSA Freedom of Information</a>                           |           |            |                                                                                                       |                                                   |                                                  |            | 2025-08-07                |
|                                                                      |           |            | <a href="#">Defining Policies, Standards, Procedures, Guides and Cheat Sheets</a>                     |                                                   |                                                  |            | 2025-01-30                |
|                                                                      |           |            | <a href="#">Implications for an RSA Member Library</a><br><a href="#">Withdrawing OCLC Membership</a> |                                                   |                                                  |            | 2025-09-15                |
|                                                                      |           |            | <a href="#">RSA Policy Overview</a>                                                                   |                                                   |                                                  |            | 2025-09-10                |
|                                                                      |           |            | <a href="#">RSA System Functionality Detailed</a>                                                     |                                                   |                                                  |            | 2024-07-01                |
|                                                                      |           |            |                                                                                                       | <a href="#">RSA System Functionality Overview</a> |                                                  |            | 2024-07-01                |
|                                                                      |           |            |                                                                                                       |                                                   |                                                  |            |                           |
| Legal Compliance                                                     |           |            |                                                                                                       |                                                   |                                                  |            |                           |
| <a href="#">RSAcat Mobile Catalog</a><br><a href="#">App Privacy</a> |           |            |                                                                                                       |                                                   |                                                  |            | 2025-06-05                |
|                                                                      |           |            |                                                                                                       |                                                   | <a href="#">RSA W-9</a>                          |            | 2025-07-24                |
|                                                                      |           |            |                                                                                                       |                                                   |                                                  |            |                           |
| RSA Member Libraries                                                 |           |            |                                                                                                       |                                                   |                                                  |            |                           |
|                                                                      |           |            |                                                                                                       |                                                   | <a href="#">RSA Library Delivery Codes</a>       |            | 2025-07-17                |
|                                                                      |           |            |                                                                                                       |                                                   |                                                  |            |                           |
| Directors and Admin Handbook                                         |           |            |                                                                                                       |                                                   |                                                  |            |                           |
|                                                                      |           |            | <a href="#">RAILS / RSA What are the Differences?</a>                                                 |                                                   |                                                  |            | 2024-03-19                |
|                                                                      |           |            |                                                                                                       | <a href="#">Terms Used in Policies</a>            |                                                  |            | 2024-03-08                |
|                                                                      |           |            |                                                                                                       |                                                   | <a href="#">RSA New Director PowerPoint</a>      |            | 2025-06-10                |
|                                                                      |           |            |                                                                                                       |                                                   |                                                  |            |                           |

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|-------------------------------|-----------|------------|---------------------------------------|-----------------------------|--------------------------------------------------------------------------------------|------------|---------------------------|
| Get in Touch                  |           |            |                                       |                             |                                                                                      |            |                           |
| Email Forums                  |           |            |                                       |                             |                                                                                      |            |                           |
|                               |           |            | Managing your RSA IONOS Email Account |                             |                                                                                      |            | 2025-06-06                |
|                               |           |            | Updating your RSA Gmail Account       |                             |                                                                                      |            | 2025-02-25                |
|                               |           |            |                                       | RSA Email Forum Memberships |                                                                                      |            | 2025-03-26                |
|                               |           |            |                                       |                             | RSA Email Forums Signup & Selection (form)                                           |            | 2025-03-26                |
| Add or Remove a Staff Account |           |            |                                       |                             |                                                                                      |            |                           |
|                               |           |            |                                       |                             | Add or Remove a Staff Account (form)                                                 |            | 2025-06-02                |
| 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 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                |

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| Policies                          | Standards | Procedures                                                              | Guides                                                                        | Cheat Sheets | Other (Forms, Videos, Dashboards, Miscellaneous)                                     | Parameters | Last updated/<br>reviewed |
|-----------------------------------|-----------|-------------------------------------------------------------------------|-------------------------------------------------------------------------------|--------------|--------------------------------------------------------------------------------------|------------|---------------------------|
|                                   |           |                                                                         |                                                                               |              | <a href="#">Report Request: New Report Subscription (form)</a>                       |            | 2023-05-12                |
|                                   |           |                                                                         |                                                                               |              | <a href="#">Report Request: One-time Report (form)</a>                               |            | 2022-01-17                |
|                                   |           |                                                                         |                                                                               |              | <a href="#">Report Request: Resend a Scheduled Report (form)</a>                     |            | 2022-01-17                |
|                                   |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
| Independence Project              |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
|                                   |           |                                                                         | <a href="#">Key Dates in RSA’s Independence Project*</a>                      |              |                                                                                      |            | 2023-08-04                |
|                                   |           |                                                                         | <a href="#">What the RSA Independence Project (RIP) means to your Library</a> |              |                                                                                      |            | 2023-09-26                |
|                                   |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
| Operations Manual                 |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
|                                   |           |                                                                         | <a href="#">RSA Operations Manual</a>                                         |              |                                                                                      |            | 2025-09-10                |
|                                   |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
| Operations Department Documents   |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
|                                   |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
| Barcodes and Equipment            |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
|                                   |           |                                                                         | <a href="#">Mod 10 Calculation</a>                                            |              |                                                                                      |            | 2024-02-14                |
|                                   |           |                                                                         | <a href="#">Ordering and Re-Using Barcodes</a>                                |              |                                                                                      |            | 2024-01-19                |
|                                   |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
| Billing                           |           |                                                                         |                                                                               |              |                                                                                      |            |                           |
| <a href="#">Fine Block Limits</a> |           |                                                                         |                                                                               |              |                                                                                      |            | 2024-05-09                |
|                                   |           | <a href="#">Adding a Bill and Bill Note Before Removing a Lost Item</a> |                                                                               |              |                                                                                      |            | 2025-09-25                |
|                                   |           |                                                                         |                                                                               |              | <a href="#">Adding a Bill and Bill Note Before Removing a Lost Item (video 1:25)</a> |            | 2024-04-09                |
|                                   |           | <a href="#">Bill Notes</a>                                              |                                                                               |              |                                                                                      |            | 2025-09-25                |

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| Policies                         | Standards | Procedures                     | Guides                                                                   | Cheat Sheets                                                   | Other (Forms, Videos, Dashboards, Miscellaneous)                            | Parameters                                          | Last updated/<br>reviewed |
|----------------------------------|-----------|--------------------------------|--------------------------------------------------------------------------|----------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------|---------------------------|
|                                  |           | <a href="#">Billing a User</a> |                                                                          |                                                                |                                                                             |                                                     | 2025-09-25                |
|                                  |           |                                |                                                                          |                                                                | <a href="#">Billing a User (video 1:56)</a>                                 |                                                     | 2025-06-12                |
|                                  |           |                                | <a href="#">Paying a Bill in WorkFlows and Online</a>                    |                                                                |                                                                             |                                                     | 2025-09-25                |
|                                  |           |                                |                                                                          |                                                                | <a href="#">Paying a Bill in WorkFlows or Online (video 7:07)</a>           |                                                     | 2025-06-16                |
|                                  |           |                                |                                                                          | <a href="#">Billing Training Resources</a>                     |                                                                             |                                                     | 2025-09-29                |
| <b>Billing Parameters</b>        |           |                                |                                                                          |                                                                |                                                                             |                                                     |                           |
|                                  |           |                                |                                                                          |                                                                |                                                                             | <a href="#">Bill Reasons*</a>                       | 2025-10-01                |
|                                  |           |                                |                                                                          |                                                                |                                                                             | <a href="#">Default Prices and Processing Fees*</a> | 2025-10-01                |
|                                  |           |                                |                                                                          |                                                                |                                                                             | <a href="#">Payment Types</a>                       | 2023-12-12                |
| <b>BLUEcloud Analytics (BCA)</b> |           |                                |                                                                          |                                                                |                                                                             |                                                     |                           |
|                                  |           |                                | <a href="#">BC Analytics – Exploring Data with Excel</a>                 |                                                                |                                                                             |                                                     | 2016-09-14                |
|                                  |           |                                | <a href="#">BLUEcloud Analytics User Reference</a>                       |                                                                |                                                                             |                                                     | 2025-01-15                |
|                                  |           |                                |                                                                          | <a href="#">BLUEcloud Analytics - Creating a Personal View</a> |                                                                             |                                                     | 2024-08-05                |
|                                  |           |                                |                                                                          |                                                                | <a href="#">BLUEcloud Analytics - Creating a Personal View (video 5:23)</a> |                                                     | 2021-04-22                |
|                                  |           |                                | <a href="#">Instructions for Subscribing to Reports via Email in BCA</a> |                                                                |                                                                             |                                                     | 2016-07-25                |
|                                  |           |                                |                                                                          | <a href="#">BLUEcloud Analytics - Logging In</a>               |                                                                             |                                                     | 2024-08-16                |
|                                  |           |                                |                                                                          |                                                                | <a href="#">BLUEcloud Analytics - Logging In (video 3:25)</a>               |                                                     | 2021-04-22                |
|                                  |           |                                |                                                                          | <a href="#">BLUEcloud Analytics - Running a Report</a>         |                                                                             |                                                     | 2024-08-05                |

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|----------|-----------|------------|--------|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------|------------|---------------------------|
|          |           |            |        |                                                                                        | <a href="#">BLUEcloud Analytics - Running a Report (video 4:28)</a>   |            | 2021-04-22                |
|          |           |            |        | <a href="#">BLUEcloud Analytics (BCA) – Save and Save As vs Create Personal View</a>   |                                                                       |            | 2025-05-29                |
|          |           |            |        | <a href="#">BLUEcloud Analytics (BCA) – WorkFlows Terminology</a>                      |                                                                       |            | 2025-05-29                |
|          |           |            |        | <a href="#">Most Popular Reports for Circ Managers and Where to Locate them in BCA</a> |                                                                       |            | 2023-08-25                |
|          |           |            |        |                                                                                        | <a href="#">Checkouts and Renewals Over Time (BCA Dashboard)</a>      |            | 2024-12-13                |
|          |           |            |        | <a href="#">Using the New Holds Placed &amp; Filled Visualization</a>                  |                                                                       |            | 2025-05-22                |
|          |           |            |        |                                                                                        | <a href="#">Holds Placed and Filled (BCA Dashboard)</a>               |            | 2024-08-16                |
|          |           |            |        | <a href="#">Interactive Collection / Shelflist Browser</a>                             |                                                                       |            | 2024-08-06                |
|          |           |            |        |                                                                                        | <a href="#">Interactive Collection Browser (BCA Dashboard)</a>        |            | 2025-04-14                |
|          |           |            |        |                                                                                        | <a href="#">Most Popular Titles and Authors (BCA Dashboard)</a>       |            | 2025-01-24                |
|          |           |            |        |                                                                                        | <a href="#">Reciprocal Borrowers (BCA Dashboard)</a>                  |            | 2025-01-24                |
|          |           |            |        |                                                                                        | <a href="#">Transit Counts To and From My Library (BCA Dashboard)</a> |            | 2025-01-15                |
|          |           |            |        |                                                                                        |                                                                       |            |                           |

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|---------------------------------------------------------------|-----------|-------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------|--------------------------------------------------------------------|------------|---------------------------|------------|
| <a href="#">Circulation Handbook</a>                          |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
| <a href="#">Circulation Topic Overview</a>                    |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
| <a href="#">Add Brief Title Helper</a>                        |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
|                                                               |           | <a href="#">Setting Up the Add Brief Title Helper</a> |                                                            |                                                          |                                                                    |            | 2024-07-29                |            |
|                                                               |           |                                                       | <a href="#">Using the Add Brief Title Helper</a>           |                                                          |                                                                    |            |                           | 2024-07-29 |
| <a href="#">BLUEcloud Circulation</a>                         |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
|                                                               |           |                                                       | <a href="#">Basic Circulation in BLUEcloud Circulation</a> |                                                          |                                                                    |            |                           | 2025-09-16 |
|                                                               |           |                                                       | <a href="#">Placing Holds in BLUEcloud Circulation</a>     |                                                          |                                                                    |            |                           | 2025-09-16 |
|                                                               |           |                                                       | <a href="#">User Registration in BLUEcloud Circulation</a> |                                                          |                                                                    |            |                           | 2025-09-16 |
|                                                               |           |                                                       |                                                            | <a href="#">Getting Started in BLUEcloud Circulation</a> |                                                                    |            |                           | 2025-08-14 |
| <a href="#">Checkout</a>                                      |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
|                                                               |           |                                                       |                                                            | <a href="#">Display an Alert for Previous Loan</a>       |                                                                    |            |                           | 2024-03-06 |
|                                                               |           |                                                       |                                                            |                                                          | <a href="#">Checking out an Item (video 3:20)</a>                  |            |                           | 2021-05-04 |
| <a href="#">Circulation Helpers in WorkFlows</a>              |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
|                                                               |           |                                                       | <a href="#">Circulation Helpers</a>                        |                                                          |                                                                    |            |                           | 2017-11-01 |
| <a href="#">Circulation Quick Reference Guide (WorkFlows)</a> |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
|                                                               |           |                                                       | <a href="#">WorkFlows Circulation Quick Reference</a>      |                                                          |                                                                    |            |                           | 2022-05-01 |
| <a href="#">Circulation Training</a>                          |           |                                                       |                                                            |                                                          |                                                                    |            |                           |            |
|                                                               |           |                                                       | <a href="#">WorkFlows Basic Circulation Workshop Guide</a> |                                                          |                                                                    |            |                           | 2024-11-18 |
|                                                               |           |                                                       |                                                            |                                                          | <a href="#">WorkFlows Basic Circulation Workshop (video 42:15)</a> |            |                           | 2023-01-11 |
|                                                               |           |                                                       |                                                            | <a href="#">Circulation Training Resources</a>           |                                                                    |            |                           | 2024-11-18 |

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|------------------------------------------|-----------|------------|------------------------------------------------------------------------|-------------------------------------|--------------------------------------------------------------------------------|------------|---------------------------|
| <a href="#">Discharge Items</a>          |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Back Dating Returns Using "Discharging Bookdrop"</a>       |                                     |                                                                                |            | 2024-01-24                |
|                                          |           |            | <a href="#">Common Pop-up Boxes</a>                                    |                                     |                                                                                |            | 2024-11-13                |
|                                          |           |            |                                                                        | <a href="#">Discharging Items</a>   |                                                                                |            | 2024-09-03                |
|                                          |           |            |                                                                        |                                     | <a href="#">Basic Workflows - Returning Materials (3 Wizards) (video 8:04)</a> |            | 2021-08-06                |
|                                          |           |            |                                                                        | <a href="#">Reshelving Location</a> |                                                                                |            | 2024-12-16                |
| <a href="#">Email Receipt Buttons</a>    |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Email Receipt Buttons</a>                                  |                                     |                                                                                |            | 2017-12-01                |
| <a href="#">Fine Fee Recommendations</a> |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Recommendations and Considerations for Going Fine Free</a> |                                     |                                                                                |            | 2025-09-22                |
| <a href="#">Mark Item Used Wizard</a>    |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Mark Item Used</a>                                         |                                     |                                                                                |            | 2024-11-11                |
| <a href="#">Search</a>                   |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Item Search and Display</a>                                |                                     |                                                                                |            | 2025-06-13                |
|                                          |           |            |                                                                        |                                     | <a href="#">Basic Item Search and Display (video 8:04)</a>                     |            | 2021-08-06                |
| <a href="#">Serials Control Module</a>   |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Using the Serial Control Module in WorkFlows</a>           |                                     |                                                                                |            | 2024-08-05                |
| <a href="#">Special Due Date Helpers</a> |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            | <a href="#">Special Due Date Helpers</a>                               |                                     |                                                                                |            | 2024-08-16                |
|                                          |           |            |                                                                        |                                     | <a href="#">Special Due Date Helpers (video 3:25)</a>                          |            | 2021-04-05                |
| <a href="#">Circulation Parameters</a>   |           |            |                                                                        |                                     |                                                                                |            |                           |
|                                          |           |            |                                                                        |                                     | <a href="#">Circulation Rule Helper Checklist - PDF version</a>                |            | 2025-09-24                |
|                                          |           |            |                                                                        |                                     | <a href="#">Circ and Hold Rule Helper Checklist - Excel version</a>            |            | 2025-09-24                |

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|----------------------------------------------|-----------|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|--------------------------------------------------------------------------|--------------------------------------------------|------------------------------------|---------------------------|
|                                              |           |                                                                                                   |                                                                                  |                                                                          |                                                  | <a href="#">Expanded Circ Map*</a> | 2025-10-01                |
|                                              |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
| Die Cut Shapes                               |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
|                                              |           |                                                                                                   |                                                                                  | <a href="#">Die Cut Shapes Collection</a>                                |                                                  |                                    | 2024-03-21                |
|                                              |           |                                                                                                   |                                                                                  | <a href="#">Die Cut Shapes Collection List</a>                           |                                                  |                                    | 2024-06-17                |
|                                              |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
| Ebooks, Apps, and Marketing                  |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
|                                              |           |                                                                                                   |                                                                                  |                                                                          | <a href="#">RSA ShoutBomb Brochure PDF</a>       |                                    | 2022-03-01                |
|                                              |           |                                                                                                   |                                                                                  |                                                                          | <a href="#">RSA ShoutBomb Brochure Word</a>      |                                    | 2022-03-01                |
| CloudSource OA                               |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
|                                              |           |                                                                                                   | <a href="#">Accessing Online Articles (aka CloudSourceOA) in RSACat</a>          |                                                                          |                                                  |                                    | 2022-07-29                |
|                                              |           |                                                                                                   | <a href="#">Advanced Searching in Online Articles (CloudSourceOA) Search Tab</a> |                                                                          |                                                  |                                    | 2022-08-31                |
|                                              |           |                                                                                                   |                                                                                  | <a href="#">CloudSourceOA FAQ for Library Staff</a>                      |                                                  |                                    | 2022-06-30                |
|                                              |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
| Interlibrary Loan and Other Resource Sharing |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |
|                                              |           | <a href="#">Creating and Deleting Temporary Brief Records for Non-RSA Interlibrary Loan Items</a> |                                                                                  |                                                                          |                                                  |                                    | 2025-03-14                |
|                                              |           | <a href="#">RAILS Delivery Codes and Labeling</a>                                                 |                                                                                  |                                                                          |                                                  |                                    | 2024-07-03                |
|                                              |           |                                                                                                   |                                                                                  | <a href="#">D1500 Numbers How to Use Them and How to Search for Them</a> |                                                  |                                    | 2024-01-23                |
|                                              |           |                                                                                                   |                                                                                  |                                                                          |                                                  |                                    |                           |

## RSA Documentation for Member Libraries

| Policies                                                       | Standards | Procedures                                                 | Guides                                                                                                   | Cheat Sheets                              | Other (Forms, Videos, Dashboards, Miscellaneous) | Parameters | Last updated/<br>reviewed |
|----------------------------------------------------------------|-----------|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|-------------------------------------------|--------------------------------------------------|------------|---------------------------|
| <b>Inventory Instructions and Item Statistics in WorkFlows</b> |           |                                                            |                                                                                                          |                                           |                                                  |            |                           |
|                                                                |           |                                                            | <a href="#">WorkFlows Inventory</a>                                                                      |                                           |                                                  |            | 2025-06-23                |
|                                                                |           |                                                            |                                                                                                          | <a href="#">WorkFlows Item Statistics</a> |                                                  |            | 2025-08-08                |
| <b>ILLINET and IPLAR Report Data</b>                           |           |                                                            |                                                                                                          |                                           |                                                  |            |                           |
|                                                                |           |                                                            | <a href="#">Answering Illinois Public Library Annual Report (IPLAR) questions using data from RSA</a>    |                                           |                                                  |            | 2025-05-16                |
|                                                                |           |                                                            | <a href="#">ILLINET Interlibrary Loan Survey – Where to find the data to complete the FY 2025 Survey</a> |                                           |                                                  |            | 2025-09-10                |
|                                                                |           |                                                            | <a href="#">Running Statistics Reports for Digital Collections in eRead Illinois</a>                     |                                           |                                                  |            | 2024-06-03                |
|                                                                |           |                                                            | <a href="#">Running Statistics Reports for Digital Collections in Overdrive/ADML</a>                     |                                           |                                                  |            | 2024-06-03                |
| <b>Library Codes, Item and Patron Barcode Prefixes</b>         |           |                                                            |                                                                                                          |                                           |                                                  |            |                           |
|                                                                |           |                                                            |                                                                                                          |                                           | <a href="#">Library Codes</a>                    |            | 2023-09-22                |
|                                                                |           |                                                            |                                                                                                          |                                           | <a href="#">RSA Item Barcode Prefixes</a>        |            | 2025-07-07                |
|                                                                |           |                                                            |                                                                                                          |                                           | <a href="#">RSA User Barcode Prefixes</a>        |            | 2025-07-07                |
| <b>Lost, Missing, Damaged and LOSTTRANS Items</b>              |           |                                                            |                                                                                                          |                                           |                                                  |            |                           |
| <b>Damaged Materials</b>                                       |           |                                                            |                                                                                                          |                                           |                                                  |            | 2025-04-03                |
|                                                                |           | <a href="#">Damaged Materials</a>                          |                                                                                                          |                                           |                                                  |            | 2025-04-09                |
| <b>Lost Materials</b>                                          |           |                                                            |                                                                                                          |                                           |                                                  |            | 2025-06-05                |
|                                                                |           | <a href="#">Lost Materials from Other Member Libraries</a> |                                                                                                          |                                           |                                                  |            | 2025-05-16                |
|                                                                |           |                                                            | <a href="#">Mark Item Lost Wizard</a>                                                                    |                                           |                                                  |            | 2025-04-07                |

## RSA Documentation for Member Libraries

| Policies                                                | Standards                         | Procedures | Guides                                                              | Cheat Sheets                                                       | Other (Forms, Videos, Dashboards, Miscellaneous)     | Parameters | Last updated/<br>reviewed |
|---------------------------------------------------------|-----------------------------------|------------|---------------------------------------------------------------------|--------------------------------------------------------------------|------------------------------------------------------|------------|---------------------------|
|                                                         |                                   |            | <a href="#">Mark Item Missing Wizard</a>                            |                                                                    |                                                      |            | 2023-10-25                |
|                                                         |                                   |            |                                                                     | <a href="#">Processing LOST-TRANS<br/>Lost In Transit Items</a>    |                                                      |            | 2025-03-21                |
|                                                         |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
| MobileStaff                                             |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
|                                                         |                                   |            | <a href="#">MobileStaff</a>                                         |                                                                    |                                                      |            | 2025-06-11                |
|                                                         |                                   |            | <a href="#">MobileStaff Inventory and<br/>Weeding (Deselecting)</a> |                                                                    |                                                      |            | 2025-06-20                |
|                                                         |                                   |            |                                                                     | <a href="#">Kiosk Mode in MobileStaff</a>                          |                                                      |            | 2024-09-23                |
|                                                         |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
| Notices in WorkFlows                                    |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
|                                                         | <a href="#">WorkFlows Notices</a> |            |                                                                     |                                                                    |                                                      |            | 2021-10-27                |
|                                                         |                                   |            | <a href="#">WorkFlows Notices</a>                                   |                                                                    |                                                      |            | 2022-04-18                |
|                                                         |                                   |            | <a href="#">Printing Notices in<br/>WorkFlows using<br/>WordPad</a> |                                                                    |                                                      |            | 2024-06-17                |
|                                                         |                                   |            |                                                                     | <a href="#">Printing WorkFlows<br/>Notices in Word</a>             |                                                      |            | 2023-12-06                |
|                                                         |                                   |            |                                                                     | <a href="#">Updating the Path for<br/>Viewing Printing Notices</a> |                                                      |            | 2025-01-10                |
|                                                         |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
| Personally Identifiable Information (PII)               |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
| <a href="#">Personally Identifiable<br/>Information</a> |                                   |            |                                                                     |                                                                    |                                                      |            | 2025-09-04                |
|                                                         |                                   |            |                                                                     |                                                                    | <a href="#">PII Protection Library<br/>Agreement</a> |            | 2025-09-04                |
|                                                         |                                   |            |                                                                     |                                                                    | <a href="#">PII Protection Staff<br/>Agreement</a>   |            | 2025-09-04                |
|                                                         |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
| Reports Topic Overview                                  |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
| All Reports                                             |                                   |            |                                                                     |                                                                    |                                                      |            |                           |
|                                                         |                                   |            |                                                                     | <a href="#">New Format to End of<br/>Month Reports</a>             |                                                      |            | 2022-11-03                |
|                                                         |                                   |            |                                                                     | <a href="#">New Monthly Reports</a>                                |                                                      |            | 2022-08-04                |

## RSA Documentation for Member Libraries

| Policies                          | Standards | Procedures | Guides | Cheat Sheets | Other (Forms, Videos, Dashboards, Miscellaneous)                                            | Parameters | Last updated/<br>reviewed |
|-----------------------------------|-----------|------------|--------|--------------|---------------------------------------------------------------------------------------------|------------|---------------------------|
| <b>RSACat Search and Links</b>    |           |            |        |              |                                                                                             |            |                           |
|                                   |           |            |        |              | <a href="#">Changing PIN in RSACat</a>                                                      |            | 2024-12-27                |
|                                   |           |            |        |              | <a href="#">How the RSACat New Book Carousels work</a>                                      |            | 2024-04-11                |
|                                   |           |            |        |              | <a href="#">Printing Charge History From RSACat</a>                                         |            | 2024-02-15                |
|                                   |           |            |        |              | <a href="#">Basic RSACat search video (3:11)</a>                                            |            | 2021-08-21                |
|                                   |           |            |        |              | <a href="#">How to Scope RSACat Facets to Display Library Specific Results (video 4:13)</a> |            | 2020-04-23                |
|                                   |           |            |        |              | <a href="#">How to use the RSACat mobile app (video 10:00)</a>                              |            | 2020-06-08                |
|                                   |           |            |        |              | <a href="#">Intro to RSACat (brochure)</a>                                                  |            | 2024-11-22                |
|                                   |           |            |        |              | <a href="#">My Account and My Lists in RSACat (bookmark)</a>                                |            | 2024-11-21                |
|                                   |           |            |        |              | <a href="#">Searching RSACat (tabletop)</a>                                                 |            | 2024-11-22                |
|                                   |           |            |        |              | <a href="#">Turning on Circulation History via RSACat (video 1:01)</a>                      |            | 2020-06-06                |
| <b>Sharing and Holds</b>          |           |            |        |              |                                                                                             |            |                           |
| <a href="#">Sharing and Holds</a> |           |            |        |              |                                                                                             |            | 2025-08-07                |
|                                   |           |            |        |              | <a href="#">Filling Requests from a Non-RSA Library</a>                                     |            | 2025-09-25                |
|                                   |           |            |        |              | <a href="#">Placing holds through the SHARE-IL Catalog</a>                                  |            | 2025-09-25                |
|                                   |           |            |        |              | <a href="#">WorkFlows Basic Holds Workshop</a>                                              |            | 2025-09-23                |
|                                   |           |            |        |              | <a href="#">Basic Holds Workshop (video 58:40)</a>                                          |            | 2021-07-22                |
|                                   |           |            |        |              | <a href="#">How Holds Work</a>                                                              |            | 2025-04-11                |
|                                   |           |            |        |              | <a href="#">Placing Holds</a>                                                               |            | 2025-04-11                |

## RSA Documentation for Member Libraries

| Policies                     | Standards | Procedures                                      | Guides                                                             | Cheat Sheets                                                                | Other (Forms, Videos, Dashboards, Miscellaneous)                                | Parameters               | Last updated/<br>reviewed |
|------------------------------|-----------|-------------------------------------------------|--------------------------------------------------------------------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------|--------------------------|---------------------------|
|                              |           |                                                 |                                                                    |                                                                             | <a href="#">Placing Holds (video 6:53)</a>                                      |                          | 2021-04-13                |
|                              |           |                                                 | <a href="#">Placing Book Club, Classroom or Research Holds</a>     |                                                                             |                                                                                 |                          | 2024-12-02                |
|                              |           |                                                 |                                                                    |                                                                             | <a href="#">Placing Book Club and Classroom Holds in WorkFlows (video 6:30)</a> |                          | 2020-04-16                |
|                              |           |                                                 |                                                                    |                                                                             | <a href="#">Place Research Holds (video 6:15)</a>                               |                          | 2020-04-16                |
|                              |           |                                                 | <a href="#">Processing Holds</a>                                   |                                                                             |                                                                                 |                          | 2025-04-11                |
|                              |           |                                                 |                                                                    | <a href="#">NEWHOLDS Current Location</a>                                   |                                                                                 |                          | 2025-04-21                |
|                              |           |                                                 |                                                                    | <a href="#">Processing a Hold that Shows Available but Hasn't Transited</a> |                                                                                 |                          | 2025-03-21                |
|                              |           |                                                 |                                                                    | <a href="#">Using a NO-TRANSIT Account</a>                                  |                                                                                 |                          | 2025-01-13                |
|                              |           |                                                 |                                                                    |                                                                             | <a href="#">WorkFlows Onshelf Items Wizard (video 3:48)</a>                     |                          | 2020-06-12                |
|                              |           |                                                 | <a href="#">Why didn't my patron's hold get filled by my item?</a> |                                                                             |                                                                                 |                          | 2024-12-16                |
|                              |           |                                                 |                                                                    | <a href="#">Renewing Items</a>                                              |                                                                                 |                          | 2024-09-03                |
|                              |           |                                                 |                                                                    |                                                                             | <a href="#">Renewing Materials (video 4:36)</a>                                 |                          | 2021-08-06                |
| <b>Holds Parameters</b>      |           |                                                 |                                                                    |                                                                             |                                                                                 |                          |                           |
|                              |           |                                                 |                                                                    |                                                                             | <a href="#">Hold Rule Helper Checklist - PDF version</a>                        |                          | 2025-09-24                |
|                              |           |                                                 |                                                                    |                                                                             |                                                                                 | <a href="#">Hold Map</a> | 2025-10-01                |
| <b>Users</b>                 |           |                                                 |                                                                    |                                                                             |                                                                                 |                          |                           |
| <a href="#">Patron Cards</a> |           |                                                 |                                                                    |                                                                             |                                                                                 |                          | 2024-08-01                |
|                              |           | <a href="#">Children of Multiple Households</a> |                                                                    |                                                                             |                                                                                 |                          | 2024-02-09                |
|                              |           |                                                 | <a href="#">User Profiles</a>                                      |                                                                             |                                                                                 |                          | 2025-09-12                |

## RSA Documentation for Member Libraries

| Policies                            | Standards                                                                     | Procedures | Guides                                                       | Cheat Sheets                                               | Other (Forms, Videos, Dashboards, Miscellaneous)                     | Parameters | Last updated/<br>reviewed |
|-------------------------------------|-------------------------------------------------------------------------------|------------|--------------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------|------------|---------------------------|
|                                     |                                                                               |            |                                                              | <a href="#">Cards for Kids</a>                             |                                                                      |            | 2025-07-11                |
|                                     |                                                                               |            |                                                              | <a href="#">Modify User/Preferred Name Bug</a>             |                                                                      |            | 2021-08-03                |
|                                     |                                                                               |            |                                                              | <a href="#">Non-Resident Library Services for Veterans</a> |                                                                      |            | 2025-07-11                |
|                                     |                                                                               |            |                                                              | <a href="#">Removing a Claims Returned Notification</a>    |                                                                      |            | 2025-09-25                |
|                                     |                                                                               |            |                                                              | <a href="#">Replacing a Lost Library Card</a>              |                                                                      |            | 2024-08-16                |
|                                     |                                                                               |            |                                                              |                                                            | <a href="#">Replacing a Lost Library Card (video 0:56)</a>           |            | 2024-03-25                |
|                                     |                                                                               |            | <a href="#">SEE-STAFF User Status</a>                        |                                                            |                                                                      |            | 2023-03-15                |
|                                     |                                                                               |            |                                                              | <a href="#">Display User Wizard</a>                        |                                                                      |            | 2024-09-03                |
|                                     |                                                                               |            |                                                              |                                                            | <a href="#">Display User Wizard (video 2:40)</a>                     |            | 2021-10-27                |
|                                     |                                                                               |            |                                                              | <a href="#">Finding the Previous User of an Item</a>       |                                                                      |            | 2024-05-01                |
| <a href="#">Patron Notes</a>        |                                                                               |            |                                                              |                                                            |                                                                      |            | 2025-01-09                |
|                                     |                                                                               |            | <a href="#">Patron Notes</a>                                 |                                                            |                                                                      |            | 2025-09-26                |
| <a href="#">Patron Registration</a> |                                                                               |            |                                                              |                                                            |                                                                      |            | 2024-06-04                |
|                                     | <a href="#">User Registration for Public, Academic, and Special Libraries</a> |            |                                                              |                                                            |                                                                      |            | 2025-10-01                |
|                                     |                                                                               |            | <a href="#">User Registration for Academic Libraries</a>     |                                                            |                                                                      |            | 2018-03-01                |
|                                     |                                                                               |            | <a href="#">User Registration for Public Libraries</a>       |                                                            |                                                                      |            | 2025-10-01                |
|                                     |                                                                               |            |                                                              |                                                            | <a href="#">Super Basic User Search (video 8:04)</a>                 |            | 2021-08-17                |
|                                     |                                                                               |            |                                                              |                                                            | <a href="#">User Registration for Public Libraries (video 11:03)</a> |            | 2020-06-05                |
|                                     |                                                                               |            | <a href="#">WorkFlows Basic Patron Registration Workshop</a> |                                                            |                                                                      |            | 2025-06-03                |
|                                     |                                                                               |            |                                                              | <a href="#">User Registration Training Resources</a>       |                                                                      |            | 2024-11-15                |

## RSA Documentation for Member Libraries

| Policies                                                                                       | Standards | Procedures | Guides                                                                | Cheat Sheets                                           | Other (Forms, Videos, Dashboards, Miscellaneous)        | Parameters                               | Last updated/<br>reviewed |
|------------------------------------------------------------------------------------------------|-----------|------------|-----------------------------------------------------------------------|--------------------------------------------------------|---------------------------------------------------------|------------------------------------------|---------------------------|
|                                                                                                |           |            |                                                                       |                                                        | <a href="#">Basic Patron Registration (video 46:10)</a> |                                          | 2024-03-26                |
|                                                                                                |           |            | <a href="#">Checkout History</a>                                      |                                                        |                                                         |                                          | 2022-06-01                |
|                                                                                                |           |            | <a href="#">Clone/Copy User Helper</a>                                |                                                        |                                                         |                                          | 2024-09-03                |
|                                                                                                |           |            |                                                                       |                                                        | <a href="#">Clone/Copy User Helper (video 2:01)</a>     |                                          | 2020-06-12                |
| <a href="#">Retention Schedule for Expired Patron Cards</a>                                    |           |            |                                                                       |                                                        |                                                         |                                          | 2023-08-09                |
|                                                                                                |           |            |                                                                       |                                                        | <a href="#">Purge Patron (form)</a>                     |                                          | 2024-06-26                |
| <a href="#">Duplicate User Deletion</a>                                                        |           |            |                                                                       |                                                        |                                                         |                                          |                           |
|                                                                                                |           |            | <a href="#">Duplicate User Deletion Form</a>                          |                                                        |                                                         |                                          | 2025-09-22                |
|                                                                                                |           |            |                                                                       |                                                        | <a href="#">Duplicate User Deletion Form (form)</a>     |                                          | 2025-09-22                |
| <a href="#">User Parameters</a>                                                                |           |            |                                                                       |                                                        |                                                         |                                          |                           |
|                                                                                                |           |            |                                                                       |                                                        |                                                         | <a href="#">User Profile Differences</a> | 2025-06-04                |
|                                                                                                |           |            |                                                                       |                                                        |                                                         | <a href="#">User Profiles*</a>           | 2025-05-01                |
|                                                                                                |           |            |                                                                       |                                                        |                                                         |                                          |                           |
| <a href="#">Setup and Config Topic Overview</a>                                                |           |            |                                                                       |                                                        |                                                         |                                          |                           |
| <a href="#">WorkFlows Setup and Configuration, Receipts, Backup and Restore, Release Notes</a> |           |            |                                                                       |                                                        |                                                         |                                          |                           |
| <a href="#">WorkFlows Setup and Configuration</a>                                              |           |            |                                                                       |                                                        |                                                         |                                          |                           |
|                                                                                                |           |            | <a href="#">Commonly Set preferences in WorkFlows for Circulation</a> |                                                        |                                                         |                                          | 2023-06-02                |
|                                                                                                |           |            | <a href="#">Installing a Thermal Receipt Printer</a>                  |                                                        |                                                         |                                          | 2024-11-27                |
|                                                                                                |           |            |                                                                       | <a href="#">WorkFlows Receipt Setup Locations</a>      |                                                         |                                          | 2024-11-27                |
|                                                                                                |           |            | <a href="#">Using WorkFlows Offline Mode</a>                          |                                                        |                                                         |                                          | 2023-10-24                |
|                                                                                                |           |            | <a href="#">WorkFlows Supervisor Set-Up</a>                           |                                                        |                                                         |                                          | 2024-11-27                |
|                                                                                                |           |            |                                                                       | <a href="#">Checking your WorkFlows version number</a> |                                                         |                                          | 2025-09-18                |

## RSA Documentation for Member Libraries

| Policies                                                    | Standards | Procedures                                                                | Guides                                                                      | Cheat Sheets                                                                         | Other (Forms, Videos, Dashboards, Miscellaneous)                               | Parameters | Last updated/<br>reviewed |
|-------------------------------------------------------------|-----------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|------------|---------------------------|
|                                                             |           |                                                                           |                                                                             | <a href="#">Correcting the Pathway for Viewing and Printing Reports in WorkFlows</a> |                                                                                |            | 2024-10-18                |
|                                                             |           |                                                                           |                                                                             | <a href="#">Entering Closed Dates in WorkFlows</a>                                   |                                                                                |            | 2024-08-19                |
|                                                             |           |                                                                           |                                                                             | <a href="#">Setting the WorkFlows Max Response Size</a>                              |                                                                                |            | 2025-09-18                |
|                                                             |           |                                                                           |                                                                             | <a href="#">Turning on Tabbed Windows in WorkFlows</a>                               |                                                                                |            | 2024-10-24                |
|                                                             |           |                                                                           |                                                                             | <a href="#">WorkFlows Classic Mode</a>                                               |                                                                                |            | 2024-09-10                |
|                                                             |           |                                                                           |                                                                             |                                                                                      | <a href="#">WorkFlows Classic Mode (and how to get out of it) (video 3:17)</a> |            | 2020-04-16                |
| <a href="#">Backup and Restore WorkFlows Configurations</a> |           |                                                                           |                                                                             |                                                                                      |                                                                                |            |                           |
|                                                             |           |                                                                           | <a href="#">Backing Up the WorkFlows Configuration Folder on Windows 10</a> |                                                                                      |                                                                                |            | 2024-12-02                |
|                                                             |           |                                                                           | <a href="#">Backing Up the WorkFlows Configuration Folder on Windows 11</a> |                                                                                      |                                                                                |            | 2024-10-16                |
|                                                             |           |                                                                           | <a href="#">Replace the Workflows Configuration Folder on Windows 11</a>    |                                                                                      |                                                                                |            | 2024-10-16                |
|                                                             |           |                                                                           | <a href="#">Replacing the Workflows Configuration Folder on Windows 10</a>  |                                                                                      |                                                                                |            | 2024-12-02                |
|                                                             |           |                                                                           |                                                                             |                                                                                      |                                                                                |            |                           |
| <a href="#">WorkFlows Tech Support and Download Files</a>   |           |                                                                           |                                                                             |                                                                                      |                                                                                |            |                           |
|                                                             |           | <a href="#">Upgrading the WorkFlows Staff Client for Symphony 4.1.0.0</a> |                                                                             |                                                                                      |                                                                                |            | 2024-03-19                |
|                                                             |           |                                                                           | <a href="#">Workflows Upgrade Release Notes for Version 4.1</a>             |                                                                                      |                                                                                |            | 2024-03-12                |
|                                                             |           |                                                                           |                                                                             |                                                                                      |                                                                                |            |                           |

## RSA Documentation for Member Libraries

| Policies                                    | Standards                                                       | Procedures                                                                                | Guides                                                 | Cheat Sheets                                    | Other (Forms, Videos, Dashboards, Miscellaneous)                                  | Parameters | Last updated/<br>reviewed |
|---------------------------------------------|-----------------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------|-----------------------------------------------------------------------------------|------------|---------------------------|
| School Handbook                             |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
|                                             | <a href="#">User Registration Standard for School Libraries</a> |                                                                                           |                                                        |                                                 |                                                                                   |            | 2024-09-09                |
|                                             |                                                                 |                                                                                           | <a href="#">User Registration for School Libraries</a> |                                                 |                                                                                   |            | 2024-09-09                |
|                                             |                                                                 |                                                                                           |                                                        |                                                 | <a href="#">User Registration for School Libraries (video 10:41)</a>              |            | 2020-07-28                |
|                                             |                                                                 | <a href="#">Discarding a Lost Item from a Graduated Student</a>                           |                                                        |                                                 |                                                                                   |            | 2024-09-11                |
|                                             |                                                                 |                                                                                           | <a href="#">Welcome to 2025/2026 School Libraries</a>  |                                                 |                                                                                   |            | 2025-07-29                |
|                                             |                                                                 |                                                                                           |                                                        |                                                 | <a href="#">WorkFlows Circulation Overview for School Libraries (video 46:15)</a> |            | 2020-08-31                |
|                                             |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
| Bibliographic Services Department Documents |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
|                                             |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
| Cataloging Handbook                         |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
| Cataloging Topic Overview                   |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
| Batch editing Items                         |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
|                                             |                                                                 | <a href="#">Item Group Editor</a>                                                         |                                                        |                                                 |                                                                                   |            | 2025-09-24                |
|                                             |                                                                 | <a href="#">Using the Item Group Editor to Search for Items Assigned Cataloging Codes</a> |                                                        |                                                 |                                                                                   |            | 2014-02-25                |
|                                             |                                                                 |                                                                                           |                                                        | <a href="#">Global Item Modification Wizard</a> |                                                                                   |            | 2022-06-09                |
| Best Practices                              |                                                                 |                                                                                           |                                                        |                                                 |                                                                                   |            |                           |
|                                             |                                                                 | <a href="#">Cooperative (Co-op) Collection</a>                                            |                                                        |                                                 |                                                                                   |            | 2025-09-22                |
|                                             |                                                                 | <a href="#">Using a Shelf List versus the WorkFlows Inventory Item Wizard</a>             |                                                        |                                                 |                                                                                   |            | 2018-03-06                |
|                                             |                                                                 |                                                                                           | <a href="#">Audio Enabled Books</a>                    |                                                 |                                                                                   |            | 2023-09-05                |

## RSA Documentation for Member Libraries

| Policies             | Standards | Procedures                                                                     | Guides                                                                          | Cheat Sheets                                                       | Other (Forms, Videos, Dashboards, Miscellaneous)                                             | Parameters | Last updated/<br>reviewed |
|----------------------|-----------|--------------------------------------------------------------------------------|---------------------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------|------------|---------------------------|
|                      |           |                                                                                | <a href="#">Cataloging Best Practices for RSA Member Libraries</a>              |                                                                    |                                                                                              |            | 2018-05-16                |
|                      |           |                                                                                | <a href="#">Cataloging Magazines in WorkFlows</a>                               |                                                                    |                                                                                              |            | 2025-09-24                |
|                      |           |                                                                                | <a href="#">GMDs versus Carrier Types on Bibliographic Records in WorkFlows</a> |                                                                    |                                                                                              |            | 2017-02-09                |
|                      |           |                                                                                | <a href="#">Pagination Considerations in Cataloging</a>                         |                                                                    |                                                                                              |            | 2020-05-07                |
|                      |           |                                                                                | <a href="#">What Is the Title Page Verso? A Parts of the Book Guide</a>         |                                                                    |                                                                                              |            | 2022-05-18                |
|                      |           |                                                                                |                                                                                 | <a href="#">Library Bound Items Best Practices</a>                 |                                                                                              |            | 2025-07-07                |
|                      |           |                                                                                |                                                                                 | <a href="#">Prefer Library of Congress Records When Cataloging</a> |                                                                                              |            | 2023-06-27                |
| <b>Brief Records</b> |           |                                                                                |                                                                                 |                                                                    |                                                                                              |            |                           |
|                      |           | <a href="#">Cataloging Cake Pans</a>                                           |                                                                                 |                                                                    |                                                                                              |            | 2025-06-23                |
|                      |           | <a href="#">Catalog Die Shapes and Sets</a>                                    |                                                                                 |                                                                    |                                                                                              |            | 2015-08-14                |
|                      |           | <a href="#">Cataloging On Order Items</a>                                      |                                                                                 |                                                                    |                                                                                              |            | 2022-10-11                |
|                      |           | <a href="#">When RSA is Ready to Upgrade Your Brief item to an OCLC Record</a> |                                                                                 |                                                                    |                                                                                              |            | 2024-10-10                |
|                      |           |                                                                                |                                                                                 |                                                                    | <a href="#">When RSA Is Ready to Upgrade Your Brief Item to an OCLC Record (video 12:15)</a> |            | 2023-03-21                |
|                      |           |                                                                                | <a href="#">Creating a Brief Record</a>                                         |                                                                    |                                                                                              |            | 2025-09-25                |
|                      |           |                                                                                |                                                                                 |                                                                    | <a href="#">How to Create a Brief Record with a UPC (video 06:41)</a>                        |            | 2022-06-30                |
|                      |           |                                                                                |                                                                                 |                                                                    | <a href="#">How to Create a Brief Record with an ISBN (video 07:43)</a>                      |            | 2022-06-30                |

## RSA Documentation for Member Libraries

| Policies                                                                       | Standards                                | Procedures | Guides                                                                             | Cheat Sheets                                           | Other (Forms, Videos, Dashboards, Miscellaneous)                                         | Parameters | Last updated/<br>reviewed |
|--------------------------------------------------------------------------------|------------------------------------------|------------|------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|------------|---------------------------|
|                                                                                |                                          |            |                                                                                    |                                                        | <a href="#">How to Create a Brief Record with an ISSN (video 06:40)</a>                  |            | 2022-06-30                |
|                                                                                |                                          |            |                                                                                    |                                                        | <a href="#">How to Create a Brief Record without an ISBN, ISSN, or UPC (video 06:57)</a> |            | 2022-06-30                |
|                                                                                |                                          |            | <a href="#">Utilizing RSA’s Seed Library Broad Category Enhanced Brief Records</a> |                                                        |                                                                                          |            | 2025-06-12                |
|                                                                                |                                          |            |                                                                                    | <a href="#">Cataloging Reserves &amp; Rentals</a>      |                                                                                          |            | 2024-06-28                |
| Cataloging Codes                                                               |                                          |            |                                                                                    |                                                        |                                                                                          |            |                           |
|                                                                                |                                          |            | <a href="#">Considerations for WorkFlows Item Category 1</a>                       |                                                        |                                                                                          |            | 2014-03-10                |
|                                                                                |                                          |            | <a href="#">Getting Started with WorkFlows Item Categories 4 &amp; 5</a>           |                                                        |                                                                                          |            | 2014-04-24                |
|                                                                                |                                          |            | <a href="#">WorkFlows Item Categories 3, 4, and 5 FAQs</a>                         |                                                        |                                                                                          |            | 2013-09-10                |
|                                                                                |                                          |            |                                                                                    | <a href="#">Asterisked Display of Cataloging Codes</a> |                                                                                          |            | 2013-07-31                |
| Cataloging Policies                                                            |                                          |            |                                                                                    |                                                        |                                                                                          |            |                           |
| <a href="#">AV Item Types Elimination</a>                                      |                                          |            |                                                                                    |                                                        |                                                                                          |            | 2014-12-04                |
| <a href="#">Bibliographic Database</a>                                         |                                          |            |                                                                                    |                                                        |                                                                                          |            | 2025-06-05                |
|                                                                                | <a href="#">Bibliographic Database</a>   |            |                                                                                    |                                                        |                                                                                          |            | 1999-05-01                |
| <a href="#">Core Competencies for Cataloging Staff at RSA Member Libraries</a> |                                          |            |                                                                                    |                                                        |                                                                                          |            | 2022-06-29                |
| <a href="#">Homosaurus Cataloging</a>                                          |                                          |            |                                                                                    |                                                        |                                                                                          |            | 2024-08-01                |
| <a href="#">New Materials Item Types</a>                                       |                                          |            |                                                                                    |                                                        |                                                                                          |            | 2022-05-10                |
|                                                                                | <a href="#">New Materials Item Types</a> |            |                                                                                    |                                                        |                                                                                          |            | 2022-08-22                |
| <a href="#">Prohibited Items</a>                                               |                                          |            |                                                                                    |                                                        |                                                                                          |            | 2025-09-04                |

## RSA Documentation for Member Libraries

| Policies                    | Standards | Procedures                                                                                        | Guides                                    | Cheat Sheets                                                             | Other (Forms, Videos, Dashboards, Miscellaneous)                        | Parameters | Last updated/<br>reviewed |
|-----------------------------|-----------|---------------------------------------------------------------------------------------------------|-------------------------------------------|--------------------------------------------------------------------------|-------------------------------------------------------------------------|------------|---------------------------|
|                             |           | <a href="#">Prohibited Items</a>                                                                  |                                           |                                                                          |                                                                         |            | 2025-09-08                |
|                             |           |                                                                                                   | <a href="#">Identifying Pirated Items</a> |                                                                          |                                                                         |            | 2025-09-08                |
| <b>Database Maintenance</b> |           |                                                                                                   |                                           |                                                                          |                                                                         |            |                           |
|                             |           |                                                                                                   |                                           | <a href="#">Database Maintenance Reports</a>                             |                                                                         |            | 2024-03-22                |
|                             |           |                                                                                                   |                                           |                                                                          | <a href="#">Tidy Cataloging Tips (video 05:34)</a>                      |            | 2020-04-23                |
| <b>Entering Items</b>       |           |                                                                                                   |                                           |                                                                          |                                                                         |            |                           |
|                             |           | <a href="#">Bibload</a>                                                                           |                                           |                                                                          |                                                                         |            | 2025-09-24                |
|                             |           |                                                                                                   |                                           |                                                                          | <a href="#">OCLC Cataloging Level Loading Bib Records (video 12:09)</a> |            | 2016-03-14                |
|                             |           | <a href="#">Change the Owning Library for an Item Cataloged in WorkFlows</a>                      |                                           |                                                                          |                                                                         |            | 2020-04-21                |
|                             |           | <a href="#">Creating Call Numbers for Multi-Piece Items</a>                                       |                                           |                                                                          |                                                                         |            | 2018-11-06                |
|                             |           | <a href="#">Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows</a> |                                           |                                                                          |                                                                         |            | 2024-10-10                |
|                             |           | <a href="#">Cataloging an Item (Duplicate Copy) On a Bibliographic Record in WorkFlows</a>        |                                           |                                                                          |                                                                         |            | 2024-10-10                |
| <b>Matching</b>             |           |                                                                                                   |                                           |                                                                          |                                                                         |            |                           |
|                             |           |                                                                                                   |                                           | <a href="#">Do Not Use a Record When</a>                                 |                                                                         |            | 2023-03-01                |
|                             |           |                                                                                                   |                                           | <a href="#">Matching a Record to Your Magazine</a>                       |                                                                         |            | 2023-11-21                |
|                             |           |                                                                                                   |                                           | <a href="#">Matching an OCLC Record to Your Book</a>                     |                                                                         |            | 2025-05-22                |
|                             |           |                                                                                                   |                                           | <a href="#">Matching an OCLC Record to Your Video or Sound Recording</a> |                                                                         |            | 2024-12-02                |
|                             |           |                                                                                                   |                                           |                                                                          | <a href="#">Bibliographic Record Tidbits (video 08:40)</a>              |            | 2020-04-23                |

## RSA Documentation for Member Libraries

| Policies                           | Standards | Procedures                                                                                | Guides                                                                                    | Cheat Sheets                                          | Other (Forms, Videos, Dashboards, Miscellaneous)            | Parameters | Last updated/<br>reviewed |
|------------------------------------|-----------|-------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|-------------------------------------------------------|-------------------------------------------------------------|------------|---------------------------|
|                                    |           |                                                                                           |                                                                                           |                                                       | <a href="#">Search, Match, and Attach (video 05:31)</a>     |            | 2023-08-17                |
| Overviews                          |           |                                                                                           |                                                                                           |                                                       |                                                             |            |                           |
|                                    |           |                                                                                           | <a href="#">Overview of the New Cataloging Process for Items without matching records</a> |                                                       |                                                             |            | 2023-03-24                |
|                                    |           |                                                                                           |                                                                                           | <a href="#">Cataloging At-A-Glance</a>                |                                                             |            | 2025-04-04                |
| Removing Items                     |           |                                                                                           |                                                                                           |                                                       |                                                             |            |                           |
|                                    |           | <a href="#">Deleting Items from WorkFlows</a>                                             |                                                                                           |                                                       |                                                             |            | 2025-03-10                |
|                                    |           | <a href="#">WorkFlows Discard User</a>                                                    |                                                                                           |                                                       |                                                             |            | 2024-09-16                |
|                                    |           |                                                                                           |                                                                                           |                                                       | <a href="#">Discard User, an Overview (video 11:06)</a>     |            | 2020-08-06                |
| Reporting Cataloging Issues to RSA |           |                                                                                           |                                                                                           |                                                       |                                                             |            |                           |
|                                    |           | <a href="#">Reporting Cataloging Issues to RSA</a>                                        |                                                                                           |                                                       |                                                             |            | 2025-05-23                |
| Searching for Items                |           |                                                                                           |                                                                                           |                                                       |                                                             |            |                           |
|                                    |           |                                                                                           | <a href="#">Search Strategy for the WorkFlows Call Number and Item Maintenance Wizard</a> |                                                       |                                                             |            | 2025-09-29                |
|                                    |           |                                                                                           |                                                                                           |                                                       | <a href="#">Forgotten Search Strategies 1 (video 06:55)</a> |            | 2020-04-23                |
|                                    |           |                                                                                           |                                                                                           |                                                       | <a href="#">Forgotten Search Strategies 2 (video 06:00)</a> |            | 2020-04-23                |
|                                    |           |                                                                                           | <a href="#">WorkFlows format search enhancement</a>                                       |                                                       |                                                             |            | 2020-12-14                |
|                                    |           |                                                                                           | <a href="#">WorkFlows Search Tips</a>                                                     |                                                       |                                                             |            | 2023-11-28                |
|                                    |           |                                                                                           |                                                                                           | <a href="#">RSACat Library of Things Search Limit</a> |                                                             |            | 2020-02-13                |
| Settings                           |           |                                                                                           |                                                                                           |                                                       |                                                             |            |                           |
|                                    |           | <a href="#">Change the Default Library in the Call Number and Item Maintenance Wizard</a> |                                                                                           |                                                       |                                                             |            | 2020-04-21                |

## RSA Documentation for Member Libraries

| Policies                                               | Standards     | Procedures                                                             | Guides                                      | Cheat Sheets | Other (Forms, Videos, Dashboards, Miscellaneous)                    | Parameters                                        | Last updated/<br>reviewed |                |
|--------------------------------------------------------|---------------|------------------------------------------------------------------------|---------------------------------------------|--------------|---------------------------------------------------------------------|---------------------------------------------------|---------------------------|----------------|
|                                                        |               |                                                                        | <a href="#">WorkFlows Cataloging Set-Up</a> |              |                                                                     |                                                   | 2024-07-03                |                |
| Transferring Items                                     |               |                                                                        |                                             |              |                                                                     |                                                   |                           |                |
|                                                        |               | <a href="#">Transfer Wizard</a>                                        |                                             |              |                                                                     | 2024-10-10                                        |                           |                |
|                                                        |               |                                                                        |                                             |              | <a href="#">Basic Cataloging Level Transfer Wizard (video 6:28)</a> | 2016-03-14                                        |                           |                |
| Updating the Path for Viewing/Printing Bibload Reports |               |                                                                        |                                             |              |                                                                     |                                                   |                           |                |
|                                                        |               | <a href="#">Updating the Path for Viewing/Printing Bibload Reports</a> |                                             |              |                                                                     | 2025-02-06                                        |                           |                |
| Cataloging Parameters                                  |               |                                                                        |                                             |              |                                                                     |                                                   |                           |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Home Location List*</a>               | 2023-11-08                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Category 1 list*</a>             | 2017-12-11                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Category 2 list*</a>             | 2014-03-04                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Category 3 list*</a>             | 2025-09-19                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Category 4 list*</a>             | 2025-09-18                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Category 5 list*</a>             | 2025-09-18                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Category 6 list*</a>             | 2025-03-17                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Item Types*</a>                       | 2023-11-08                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Mandatory Codes for RSA Libraries</a> | 2025-08-28                |                |
|                                                        |               |                                                                        |                                             |              |                                                                     | <a href="#">Serials Holdings Codes*</a>           | 2024-11-01                |                |
| Asterisk denotes document hosted on old support site   |               |                                                                        |                                             |              |                                                                     |                                                   |                           |                |
| Color Code key                                         | Dropdown Item | Handbook                                                               |                                             |              | Topic                                                               |                                                   | Primary Page              | Secondary Page |