

RSA Documentation for Member Libraries

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

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RSA Expectations & Responsibilities							2025-06-05
RSA Freedom of Information							2025-08-07
			Defining Policies, Standards, Procedures, Guides and Cheat Sheets				2025-01-30
			Implications for an RSA Member Library Withdrawing OCLC Membership				2025-09-15
			RSA Policy Overview				2025-11-07
			RSA System Functionality Detailed				2024-07-01
				RSA System Functionality Overview			2024-07-01
Legal Compliance							
RSAcatalog Mobile Catalog App Privacy							2025-06-05
					RSA W-9		2025-07-24
RSA Member Libraries							
					RSA Library Delivery Codes		2025-11-03
Directors and Admin Handbook							
			RAILS / RSA What are the Differences?				2024-03-19
				Terms Used in Policies			2024-03-08
					RSA New Director PowerPoint		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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					Report Request: New Report Subscription (form)		2023-05-12
					Report Request: One-time Report (form)		2022-01-17
					Report Request: Resend a Scheduled Report (form)		2022-01-17
Independence Project							
			Key Dates in RSA’s Independence Project*				2023-08-04
			What the RSA Independence Project (RIP) means to your Library				2023-09-26
Operations Manual							
			RSA Operations Manual				2025-09-10
Operations Department Documents							
Barcodes and Equipment							
			Mod 10 Calculation				2024-02-14
			Ordering and Re-Using Barcodes				2024-01-19
Billing							
Fine Block Limits							2024-05-09
		Adding a Bill and Bill Note Before Removing a Lost Item					2025-09-25
					Adding a Bill and Bill Note Before Removing a Lost Item (video 1:25)		2024-04-09
		Bill Notes					2025-09-25

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		Billing a User					2025-09-25
					Billing a User (video 1:56)		2025-06-12
			Paying a Bill in WorkFlows and Online				2025-09-25
					Paying a Bill in WorkFlows or Online (video 7:07)		2025-06-16
				Billing Training Resources			2025-09-29
Billing Parameters							
						Bill Reasons*	2025-11-03
						Default Prices and Processing Fees*	2025-11-03
						Payment Types	2023-12-12
BLUEcloud Analytics (BCA)							
			BC Analytics – Exploring Data with Excel				2016-09-14
			BLUEcloud Analytics User Reference				2025-01-15
				BLUEcloud Analytics - Creating a Personal View			2024-08-05
					BLUEcloud Analytics - Creating a Personal View (video 5:23)		2021-04-22
			Instructions for Subscribing to Reports via Email in BCA				2016-07-25
				BLUEcloud Analytics - Logging In			2024-08-16
					BLUEcloud Analytics - Logging In (video 3:25)		2021-04-22
				BLUEcloud Analytics - Running a Report			2024-08-05

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

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Circulation Handbook							
Circulation Topic Overview							
Add Brief Title Helper							
		Setting Up the Add Brief Title Helper					2024-07-29
			Using the Add Brief Title Helper				2024-07-29
BLUEcloud Circulation							
			Basic Circulation in BLUEcloud Circulation				2025-09-16
			Placing Holds in BLUEcloud Circulation				2025-09-16
			Processing Holds in BLUEcloud Circulation				2025-11-03
			User Registration in BLUEcloud Circulation				2025-09-16
				Getting Started in BLUEcloud Circulation			2025-08-14
Checkout							
				Display an Alert for Previous Loan			2024-03-06
					Checking out an Item (video 3:20)		2021-05-04
Circulation Quick Reference Guide (WorkFlows)							
				WorkFlows Circulation Quick Reference			2025-10-15
Circulation Training							
			WorkFlows Basic Circulation Workshop Guide				2024-11-18
					WorkFlows Basic Circulation Workshop (video 42:15)		2023-01-11
				Circulation Training Resources			2024-11-18

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Discharge Items							
			Back Dating Returns Using "Discharging Bookdrop"				2024-01-24
			Common Pop-up Boxes				2024-11-13
				Discharging Items			2024-09-03
					Basic Workflows - Returning Materials (3 Wizards) (video 8:04)		2021-08-06
				Reshelving Location			2024-12-16
Fine Fee Recommendations							
			Recommendations and Considerations for Going Fine Free				2025-09-22
Mark Item Used Wizard							
			Mark Item Used				2024-11-11
Search							
			Item Search and Display				2025-06-13
					Basic Item Search and Display (video 8:04)		2021-08-06
Serials Control Module							
			Using the Serial Control Module in WorkFlows				2024-08-05
Special Due Date Helpers							
			Special Due Date Helpers				2024-08-16
					Special Due Date Helpers (video 3:25)		2021-04-05
Circulation Parameters							
					Circulation Rule Helper Checklist - PDF version		2025-10-17
					Circ and Hold Rule Helper Checklist - Excel version		2025-10-17
						Expanded Circ Map*	2025-11-03

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Die Cut Shapes							
				Die Cut Shapes Collection			2024-03-21
				Die Cut Shapes Collection List			2024-06-17
Ebooks, Apps, and Marketing							
					RSA ShoutBomb Brochure PDF		2022-03-01
					RSA ShoutBomb Brochure Word		2022-03-01
CloudSource OA							
			Accessing Online Articles (aka CloudSourceOA) in RSACat				2022-07-29
			Advanced Searching in Online Articles (CloudSourceOA) Search Tab				2022-08-31
				CloudSourceOA FAQ for Library Staff			2022-06-30
Interlibrary Loan and Other Resource Sharing							
		Creating and Deleting Temporary Brief Records for Non-RSA Interlibrary Loan Items					2025-03-14
		RAILS Delivery Codes and Labeling					2024-07-03
				D1500 Numbers How to Use Them and How to Search for Them			2024-01-23
Inventory Instructions and Item Statistics in WorkFlows							
			WorkFlows Inventory				2025-06-23
				WorkFlows Item Statistics			2025-08-08

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ILLINET and IPLAR Report Data							
			Answering Illinois Public Library Annual Report (IPLAR) questions using data from RSA				2025-05-16
			ILLINET Interlibrary Loan Survey – Where to find the data to complete the FY 2025 Survey				2025-09-10
			Running Statistics Reports for Digital Collections in eRead Illinois				2024-06-03
			Running Statistics Reports for Digital Collections in Overdrive/ADML				2024-06-03
Library Codes, Item and Patron Barcode Prefixes							
						Library Codes	2023-09-22
						RSA Item Barcode Prefixes	2025-07-07
						RSA User Barcode Prefixes	2025-07-07
Lost, Missing, Damaged and LOSTTRANS Items							
Damaged Materials							2025-04-03
		Damaged Materials					2025-04-09
Lost Materials							2025-06-05
		Lost Materials from Other Member Libraries					2025-05-16
			Mark Item Lost Wizard				2025-04-07
			Mark Item Missing Wizard				2023-10-25
				Processing LOST-TRANS Lost In Transit Items			2025-03-21

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MobileStaff							
			MobileStaff				2025-06-11
			MobileStaff Inventory and Weeding (Deselecting)				2025-06-20
				Kiosk Mode in MobileStaff			2024-09-23
Notices in WorkFlows							
	WorkFlows Notices						2021-10-27
			WorkFlows Notices				2022-04-18
			Printing Notices in WorkFlows using WordPad				2024-06-17
				Printing WorkFlows Notices in Word			2023-12-06
				Updating the Path for Viewing Printing Notices			2025-01-10
Personally Identifiable Information (PII)							
	Personally Identifiable Information						2025-09-04
					PII Protection Library Agreement		2025-09-04
					PII Protection Staff Agreement		2025-09-04
Reports Topic Overview							
All Reports							
				New Format to End of Month Reports			2022-11-03
				New Monthly Reports			2022-08-04
RSAcac Search and Links							
		Changing a User Account Number in RSAcat Mobile					2025-11-07

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				Changing PIN in RSACat			2024-12-27
				How the RSACat New Book Carousels work			2024-04-11
				Printing Charge History From RSACat			2024-02-15
					Basic RSACat search video (3:11)		2021-08-21
					How to Scope RSACat Facets to Display Library Specific Results (video 4:13)		2020-04-23
					How to use the RSACat mobile app (video 10:00)		2020-06-08
					Intro to RSACat (brochure)		2024-11-22
					My Account and My Lists in RSACat (bookmark)		2024-11-21
					Searching RSACat (tabletop)		2024-11-22
					Turning on Circulation History via RSACat (video 1:01)		2020-06-06
Sharing and Holds							
				Sharing and Holds			2025-08-07
				Filling Requests from a Non-RSA Library			2025-09-25
				Placing holds through the SHARE-IL Catalog			2025-09-25
				WorkFlows Basic Holds Workshop			2025-09-23
					Basic Holds Workshop (video 58:40)		2021-07-22
				How Holds Work			2025-04-11
				Placing Holds			2025-04-11
					Placing Holds (video 6:53)		2021-04-13

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			Placing Book Club, Classroom or Research Holds				2024-12-02
					Placing Book Club and Classroom Holds in WorkFlows (video 6:30)		2020-04-16
					Place Research Holds (video 6:15)		2020-04-16
			Processing Holds				2025-04-11
				NEWHOLDS Current Location			2025-04-21
				Processing a Hold that Shows Available but Hasn't Transited			2025-03-21
				Using a NO-TRANSIT Account			2025-01-13
					WorkFlows Onshelf Items Wizard (video 3:48)		2020-06-12
			Why didn't my patron's hold get filled by my item?				2024-12-16
				Renewing Items			2024-09-03
					Renewing Materials (video 4:36)		2021-08-06
Holds Parameters							
					Hold Rule Helper Checklist - PDF version		2025-10-17
						Hold Map	2025-11-03
Users							
User Cards							
				Children of Multiple Households			2025-11-10
			User Profiles				2025-11-07
				Cards for Kids			2025-07-11

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				Non-Resident Library Services for Veterans			2025-07-11
	User Registration for Public, Academic, and Special Libraries						2025-11-10
			User Registration for Academic Libraries				2025-11-03
			User Registration for Public Libraries				2025-10-13
					User Registration for Public Libraries (video 11:03)		2020-06-05
				Clone/Copy User Helper			2025-10-06
					Clone/Copy User Helper (video 2:01)		2020-06-12
			Using the Modify User Wizard				2025-10-13
					Replacing a Lost Library Card (video 0:56)		2024-03-25
					Super Basic User Search (video 8:04)		2021-08-17
			Basic WorkFlows Patron Registration Workshop				2025-10-13
					Basic Patron Registration (video 46:10)		2024-03-26
			Checkout History				2022-06-01
				Finding the Previous User of an Item			2024-05-01
			User Statuses				2025-11-03
				Removing a Claims Returned Notification			2025-09-25
				Display User Wizard			2024-09-03
					Display User Wizard (video 2:40)		2021-10-27
			Patron Notes				2025-11-07

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Retention Schedule for Expired Patron Cards							2023-08-09
					Purge Patron (form)		2024-06-26
Duplicate User Deletion							
			Duplicate User Deletion Form				2025-09-22
					Duplicate User Deletion Form (form)		2025-09-22
User Parameters							
						User Profile Differences	2025-06-04
						User Profiles*	2025-11-03
Setup and Config Topic Overview							
WorkFlows Setup and Configuration, Receipts, Backup and Restore, Release Notes							
WorkFlows Setup and Configuration							
			Commonly Set preferences in WorkFlows for Circulation				2023-06-02
			Installing a Thermal Receipt Printer				2024-11-27
				WorkFlows Receipt Setup Locations			2024-11-27
			Using WorkFlows Offline Mode				2023-10-24
			WorkFlows Supervisor Set-Up				2024-11-27
				Checking your WorkFlows version number			2025-09-18
				Correcting the Pathway for Viewing and Printing Reports in WorkFlows			2024-10-18
				Entering Closed Dates in WorkFlows			2024-08-19
				Setting the WorkFlows Max Response Size			2025-09-18

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				Turning on Tabbed Windows in WorkFlows			2024-10-24
				WorkFlows Classic Mode			2024-09-10
					WorkFlows Classic Mode (and how to get out of it) (video 3:17)		2020-04-16
Backup and Restore WorkFlows Configurations							
			Backing Up the WorkFlows Configuration Folder on Windows 10				2024-12-02
			Backing Up the WorkFlows Configuration Folder on Windows 11				2024-10-16
			Replace the Workflows Configuration Folder on Windows 11				2024-10-16
			Replacing the Workflows Configuration Folder on Windows 10				2024-12-02
WorkFlows Tech Support and Download Files							
		Upgrading the WorkFlows Staff Client for Symphony 4.1.0.0					2024-03-19
			Workflows Upgrade Release Notes for Version 4.1				2024-03-12
School Handbook							
	User Registration Standard for School Libraries						2024-09-09
			User Registration for School Libraries				2024-09-09

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					User Registration for School Libraries (video 10:41)		2020-07-28
		Discarding a Lost Item from a Graduated Student					2024-09-11
			Welcome to 2025/2026 School Libraries				2025-07-29
					WorkFlows Circulation Overview for School Libraries (video 46:15)		2020-08-31
Bibliographic Services Department Documents							
Cataloging Handbook							
Cataloging Topic Overview							
Batch editing Items							
		Item Group Editor					2025-09-24
		Using the Item Group Editor to Search for Items Assigned Cataloging Codes					2014-02-25
				Global Item Modification Wizard			2022-06-09
Best Practices							
		Cooperative (Co-op) Collection					2025-09-22
		Using a Shelf List versus the WorkFlows Inventory Item Wizard					2018-03-06
			Audio Enabled Books				2023-09-05
			Cataloging Best Practices for RSA Member Libraries				2018-05-16
			Cataloging Magazines in WorkFlows				2025-09-24

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			GMDs versus Carrier Types on Bibliographic Records in WorkFlows				2017-02-09	
			Pagination Considerations in Cataloging				2020-05-07	
			What Is the Title Page Verso? A Parts of the Book Guide				2022-05-18	
				Library Bound Items Best Practices			2025-07-07	
				Prefer Library of Congress Records When Cataloging			2023-06-27	
Brief Records								
		Cataloging Cake Pans					2025-06-23	
		Catalog Die Shapes and Sets in WorkFlows					2015-08-14	
		Cataloging On Order Items					2022-10-11	
		When RSA is Ready to Upgrade Your Brief item to an OCLC Record					2024-10-10	
					When RSA Is Ready to Upgrade Your Brief Item to an OCLC Record (video 12:15)		2023-03-21	
			Creating a Brief Record					2025-09-25
					How to Create a Brief Record with a UPC (video 06:41)		2022-06-30	
					How to Create a Brief Record with an ISBN (video 07:43)		2022-06-30	
					How to Create a Brief Record with an ISSN (video 06:40)		2022-06-30	

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					How to Create a Brief Record without an ISBN, ISSN, or UPC (video 06:57)		2022-06-30
			Utilizing RSA's Seed Library Broad Category Enhanced Brief Records				2025-06-12
				Cataloging Reserves & Rentals			2024-06-28
Cataloging Codes							
			Considerations for WorkFlows Item Category 1				2014-03-10
			Getting Started with WorkFlows Item Categories 4 & 5				2014-04-24
			WorkFlows Item Categories 3, 4, and 5 FAQs				2013-09-10
				Asterisked Display of Cataloging Codes			2013-07-31
Cataloging Policies							
							Bibliographic Database
							2025-06-05
							Bibliographic Database
							1999-05-01
							Core Competencies for Cataloging Staff at RSA Member Libraries
							2022-06-29
							Homosaurus Cataloging
							2024-08-01
							New Materials Item Types
							2022-05-10
							New Materials Item Types
							2022-08-22
							Prohibited Items
							2025-09-04
							Prohibited Items
							2025-09-08
							Identifying Pirated Items
							2025-09-08
							Pirated Items Overview (video 09:04)
							2025-10-30

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Database Maintenance							
				Database Maintenance Reports			2024-03-22
					Tidy Cataloging Tips (video 05:34)		2020-04-23
Entering Items							
		Bibload					2025-09-24
					OCLC Cataloging Level Loading Bib Records (video 12:09)		2016-03-14
		Change the Owning Library for an Item Cataloged in WorkFlows.					2020-04-21
		Creating Call Numbers for Multi-Piece Items					2018-11-06
		Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows					2024-10-10
		Cataloging an Item (Duplicate Copy) On a Bibliographic Record in WorkFlows					2024-10-10
Matching							
				Do Not Use a Record When			2023-03-01
				Matching a Record to Your Magazine			2023-11-21
				Matching an OCLC Record to Your Book			2025-05-22
				Matching an OCLC Record to Your Video or Sound Recording			2024-12-02
					Bibliographic Record Tidbits (video 08:40)		2020-04-23
					Search, Match, and Attach (video 05:31)		2023-08-17
Overviews							

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			Overview of the New Cataloging Process for Items without matching records				2023-03-24
				Cataloging At-A-Glance			2025-04-04
Removing Items							
		Deleting Items from WorkFlows				2025-03-10	
		WorkFlows Discard User				2024-09-16	
					Discard User, an Overview (video 11:06)		2020-08-06
Reporting Cataloging Issues to RSA							
		Reporting Cataloging Issues to RSA				2025-05-23	
Searching for Items							
			Search Strategy for the WorkFlows Call Number and Item Maintenance Wizard				2025-09-29
					Forgotten Search Strategies 1 (video 06:55)		2020-04-23
					Forgotten Search Strategies 2 (video 06:00)		2020-04-23
			WorkFlows format search enhancement				2020-12-14
			WorkFlows Search Tips				2023-11-28
				RSAcatalog Library of Things Search Limit			2020-02-13
Settings							
		Change the Default Library in the Call Number and Item Maintenance Wizard				2020-04-21	
			WorkFlows Cataloging Set-Up				2024-07-03

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Transferring Items								
		Transfer Wizard				2024-10-10		
					Basic Cataloging Level Transfer Wizard (video 6:28)	2016-03-14		
Updating the Path for Viewing/Printing Bibload Reports								
		Updating the Path for Viewing/Printing Bibload Reports				2025-02-06		
Cataloging Parameters								
						Home Location List*	2023-11-08	
						Item Category 1 list*	2017-12-11	
						Item Category 2 list*	2014-03-04	
						Item Category 3 list*	2025-09-19	
						Item Category 4 list*	2025-10-20	
						Item Category 5 list*	2025-11-07	
						Item Category 6 list*	2025-03-17	
						Item Types*	2023-11-08	
						Mandatory Codes for RSA Libraries	2025-08-28	
						Serials Holdings Codes*	2024-11-01	
Asterisk denotes document hosted on old support site								
Color Code key	Dropdown Item	Handbook			Topic		Primary Page	Secondary Page