Cataloging at-a-Glance Cheat Sheet 2026

Last updated: March 6, 2026

Questions about cataloging?
Please contact the RSA Help Desk at help@librariesofrsa.org or 1-866-940-4083.

RSA Cataloging Site Visits:
A cataloging site visit is the perfect opportunity for library and RSA staff to connect, discuss helpful cataloging topics, and answer any cataloging-related questions. Site visits may be conducted in-person or virtually, whichever works best for your library.

Request a cataloging site visit: https://form.jotform.com/RSAnfp/RSAsite-visit-request

Requesting a cataloging site visit does not replace RSA staff visiting your library for a routine, in-person site visit once every 18 months. Routine visits are conducted by both the RSA Bibliographic and Library Services departments.

WorkFlows Cataloger Accounts:
Submit the Add or Remove a Staff Account form to keep RSA informed as new cataloging staff begin to work at your library, and as existing cataloging staff depart or retire.

WorkFlows "How To" Refreshers:
- How to set up the WorkFlows Cataloging module:
  https://support.librariesofrsa.org/project/WorkFlows-cataloging-set-up-guide/
- How to match an OCLC record to a book:
  https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-book/
- How to match an OCLC record to a video or sound recording:
  https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-video-or-sound-recording/
- How to catalog a call number (brand new title):
  https://support.librariesofrsa.org/project/add-a-call-number-brand-new-item/
- How to create a brief record if there is no matching record already in WorkFlows or OCLC (if your library uses OCLC):
  https://support.librariesofrsa.org/project/create-a-brief-record/
- How to discard an item:
- https://support.librariesofrsa.org/project/WorkFlows-discard-user/
- How to use the Global Item Modification wizard to change multiple items at once:
  https://support.librariesofrsa.org/project/global-item-modification-wizard/

Additional Cataloging Services:

If you have local history, genealogy, or special collections in need of cataloging, contact:

Dr. Pamela Thomas, Cataloging Maintenance Center

(618) 467-8649

cmc@illinoisheartland.org

https://www.illinoisheartland.org/services/cmc

If you have non-English language items in need of cataloging, contact:

Nincy George, RAILS Cataloging Services

(630) 734-5128

nincy.george@railslibraries.org

https://railslibraries.org/catalogs/cataloging-services

Basic WorkFlows Cataloging Workshops:

Objectives:

- Receive an individually named account to catalog at the basic level in the WorkFlows database (if the registrant is not already using an individual account).
- Through hands-on practice, learn how to use WorkFlows to catalog items in a variety of formats.
- Create brief records for items that lack matching bibliographic records already in WorkFlows.
- Discover how to perform global item edits and use the discard account.
- Find out how RSA, RAILS, and the Cataloging Maintenance Center provide original cataloging assistance.
- Review reports that identify cataloging issues in need of correction to ensure a quality database and optimal discoverability for users.

Tuesday, March 24   9:00 am – 1:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-03-24/rsa-online-basic-WorkFlows-cataloging-workshop

Thursday, April 30   12:00 pm – 5:00 pm   Prairie Creek Public Library
Registration: https://librarylearning.org/event/2026-04-30/rsa-person-basic-WorkFlows-cataloging-workshop

Friday, May 22   9:00 am – 1:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-05-22/rsa-online-basic-WorkFlows-cataloging-workshop

Friday, June 19   12:00 pm – 4:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-06-19/rsa-online-basic-WorkFlows-cataloging-workshop

Tuesday, July 14   9:00 am – 1:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-07-14/rsa-online-basic-WorkFlows-cataloging-workshop

Thursday, August 27   12:00 pm – 4:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-08-27/rsa-online-basic-WorkFlows-cataloging-workshop

Wednesday, September 23   9:00 am – 1:00 pm   Carlock Public Library
Registration: https://librarylearning.org/event/2026-09-23/rsa-person-basic-WorkFlows-cataloging-workshop

Wednesday, October 14   12:00 pm – 4:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-10-14/rsa-online-basic-WorkFlows-cataloging-workshop

Thursday, November 19   9:00 am – 1:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-11-19/rsa-online-basic-WorkFlows-cataloging-workshop

Tuesday, December 29   12:00 pm – 4:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-12-29/rsa-online-basic-WorkFlows-cataloging-workshop

RSA Bibload Workshops:
This workshop will focus on how to use OCLC Connexion Client to make bibliographic records usable for RSA, including how to add library-specific call number/item information to the records, export them from the Client in the correct format, and load them into WorkFlows so they are visible in RSAcat.

Wednesday, May 13   9:30 am – 12:00 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-05-13/rsa-online-bibload-workshop

Friday, August 14   9:30 am – 12:00 pm   RAILS East Peoria
Registration: https://librarylearning.org/event/2026-08-14/rsa-person-bibload-workshop

Tuesday, November 10   1:00 pm – 3:30 pm   Online in Microsoft Teams
Registration: https://librarylearning.org/event/2026-11-10/rsa-online-bibload-workshop

WorkFlows Item Group Editor Training:
The Item Group Editor allows you to search for a group of items in your collection and then make changes to all of those items in a single batch. Examples of values that can be

changed using the Item Group Editor include (but are not limited to) home location, price, item type, and item cats 1-5.

Examples of batch changes in the Item Group Editor:
- Does your library have quite a few books or DVDs assigned a "new" home location code (e.g., NEW-BOOK, NEW-DVD) that are no longer new and need to be assigned the home location your library uses for its non-new materials?
- Has your library assigned the item category 1 code UNDEFINED to many of its materials, and UNDEFINED needs to be changed to FICTION, NONFICTION, or EQUIPMENT?
- Has your library assigned the item category 2 code UNDEFINED, which needs to be edited to the appropriate reading level (adult, young adult, or juvenile)?

Item Group Editor training is conducted in-person at your library, taking up to 3 hours to complete. Please reach out to help@librariesofrsa.org if you are interested in scheduling this training for your library. Item Group Editor training requests are accepted on a first-come, first-served basis.

RSA Cataloging Chats:
Cataloging and other interested staff are invited to attend an RSA Cataloging Chat to learn what's new with the Cataloging Maintenance Center, RAILS Cataloging Services, and the RSA Cataloging Department.

Friday, May 29   10:30 am – 12:30 pm
This Cataloging Chat will be hosted in-person at the Chenoa Public Library District and online in Microsoft Teams. To attend in-person at Chenoa, register on L2. To attend online, register on Teams.

The September Cataloging Chat will be offered as a recording with no live attendance option. Watch the Cataloging forum for an announcement once the recording is ready on the RSA YouTube.