



Resource Sharing Alliance
715 Sabrina Drive
East Peoria, IL 61611
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**DIRECTORS ADVISORY COMMITTEE (DAC)
MINUTES - DRAFT**

Wednesday, March 11, 2026 | 1:00 PM
Peoria Public Library, North Branch
3001 W. Grand Pkwy, Peoria, IL 61615

1. Welcome and Call to Order [Chair]

1.1 Roll call of DAC members at meeting location [Note Taker]

Genna Buhr - present
Bobbi Mock - present
Amy Harris - present
Kristen Tortat - present
Randall Yelverton - present
Rachel Ballenger - present
Noelle Thompson - present

2. Recognition of guests, public comments, and announcements [Chair]

2.1 In person

Kendal Orrison, Antony Deter, Erica Laughlin, Laura Spires
David Eckert – Kewanee Public Library
Jenny Jackson – Marquette Heights Library
Alyssa Williams – Morton PL
Courtney Young – Avon PL

2.2 Online in Teams

Alyce Jackson – CPLD
Lexie Walsh – Washington District Library
Kristin Holzhauer – Pontiac PL
Mike Baumann – Toulon PLD
Barb Tarbuck – H.A. Peine DL
Lori Priebe – Danvers Township Library
Katie Hahn – Brimfield PLD
Amy Gee – Carthage PLD
Lori Urban – Heyworth PLD
Julie Houston – Ayer PL
Dawn Smith – Illinois Prairie DPL
Jenny Sevier – Peoria PL
Rebecca Seaborn – Farmington PL

3. Agenda adoption (action requested) [Chair]

Motion to Adopt Agenda

Motion by Rachel Ballenger, seconded by Jenny Jackson

Voice vote called: **Motion carried by unanimous vote**

4. Approve DAC meeting minutes from 10 December (action requested) [Chair]

Motion to Approve DAC Minutes from 10 December

Motion by Bobbi Mock, seconded by Noelle Thompson

Voice vote called: **Motion carried by unanimous vote**

5. Reports

5.1 Chair's Report & New Taskings from the Board of Directors [Chair]

- Board has met twice since the last DAC meeting. Not a lot to report.

5.2 RSA Report [ED]

- Nearly finished with independent project. All that is left is new monitors . The Invoice for those was received yesterday. Two data sims need to be removed from RAILS account. RSA has until June 2026 to get those done.
- The amount of work to run an organization and build a new organization basically amounted to a system migration over the last six months. Most of that was done with little or no staff because they needed to focus on daily operations.
- Several new people have been added to RSA. Laura, Mason, and Zac started in January and Maria started Monday.
- At email was sent out re: an upgrade Sunday evening to Symphony 4.2. The changes basically touch every part of the system.
- After the upgrade, we will work with BLUEcloud Circulation to put together and test report groups. We can set it up so all staff members can access shared reports, or just a few can access shared reports. As a result, there will be one less security hole that exists in the system.

- The timeline for individual accounts will begin with the test server next week. We will probably start with Fondulac then try to move to the libraries with BLUEcloud Circulation.

- There are three levels of access. Access will be based upon training. The individual accounts will be library specific; the system has to know where the employee is when they log in. This is being done because we have to get rid of shared circ accounts for security purposes. RSA cannot advise libraries on their internal policies for these accounts.

- The second big change: no-transit item type. Kendal has done a lot of testing on this in recent days. We would create an item type no transit/attach records to that item.

- Design decisions made in the system changes the pickup library. This type of issue should be documented for no transitable item.

- The amount of work SIRSI put into this/the amount of work touches every part of the system. We need to be aware of the implications of the roll out. This will take a lot of thought to figure out the best way to do this. We have to add new item types. We need to play around with this and test in RSAcat.

- This also affects billing as a result. This could be useful if this is set up correctly. We are going to take our time on this upgrade. If a library is running an old version of symphony, the updates may not be visible.

- Firewall changes: new firewall has been set up in the office. Thank you to Randall for allowing his staff to help test it. If done correctly and if you update the IP address like we are asking you to, you should not notice when we move between firewalls. The email covering this went out today.

6. Unfinished Business

6.1 Implementation / Beta Testing Individual Circulation accounts update (discussion) [Deter]

- We have 15 libraries set up with BCC where people in the libraries are using it a little bit. 100 people are set up to use it. There is also a forum to gather feedback. All is being sent up to SIRSI.

- If you are at a library using BCC, please consider attending the breakout sessions on RSA Day. We have two people coming from SIRSI to speak at RSA Day.

- Library contacted us yesterday for an outreach event next week. We were able to get them set up in BCC and get them up to speed. We have the capacity to spin up a library to use the product relatively quickly. If it is a library as big as Peoria Public Library, it would take longer to get things set up because of the scale; but we can turn it around quickly for most of our libraries.

6.2 Standardization: 2027 there will be either a system migration OR in-place migration Symphony to Symphony. Opportunity for standardization. Importance of role of DAC (discussion) [Deter].

6.2.1 Standardization candidate: draft system codes/library names – draft included

- Symphony has been up and running for 20 years. We need to develop new system codes that are clearer and can be future-proofed. The biggest problem currently is people misreading the code and making errors.
- The codes have to be 10 digits. With a new system, we are still limited to 10 digit codes. If we made it clear from the system profile that it is a school, it should be obvious. The idea is to demonstrate in the code if the library is a school, public, or academic. Vowels are taken out of the library code name beginning with vowels from the end of the library name first.
- If the library adds a branch, we already will know what it would be called. Peoria Heights became Pheights. My rule is to drop vowels beginning at the back end of the word. Academics are designated as A_. Schools are designated as S_.
- If we move to a non SIRSI product, we may not have to stick with a ten digit code. If a library changes its name, we would have to pay SIRSI to make that change. We cannot guess if those changes will occur.
- PEORIAALL is an example of how we tie the branches together in workflows. Every library with branches has an ALL group. This is how holds work for your libraries. PEORIA MAIN is a member of PEORIA ALL.

6.2.2 Standardization candidate: item types in system. Do we need 190 item types? Would generic ones help? Book1 – Book-5, Book-NC-1, BOOK-NH-1, draft structure included.

- If we do stay with SIRSI, do we want to keep this many item types? One way of looking at this is to not use the item types to fix every issue but to just have standards on how we use them. The idea would be to have a set of generic item types that would be built up through the circ map.
- If we migrate Symphony to Symphony, we want to reduce the number of item types.

6.3 Ongoing mandatory in person member visits update (discussion [ED/Deter]

- As a result of the mandatory visits, we are getting all kinds of work to do. It is proving very helpful so far. In February, RSA staff visited 28 libraries. We are due to be finished visiting school libraries by the end of the school year.

7. New Business

7.1 Documentation Updates – Bibliographic Database Standard (discussion) [Laughlin]

- Standards are 27 years old and have been revised and updated. They needed to be updated to reflect current cataloging best practices.

- We are trying to get a better handle on how magazines display. Page 9 references the magazine guidelines. We want to make sure we have a good roadmap for the system migration.

- Erica will take all feedback and do necessary updates as they come up. We will keep this updated and fresh. Please have your cataloging staff review it.

7.2 Towards a new Strategic Plan (discussion) [Deter]

- The strategic plan for RSA specific goals which was derailed in 2020 due to the pandemic.

- Two of the legs of the plan were implemented and the other parts were imposed to push RSA into independence.

- We need a new strategic plan. The only thing that did not get implemented was the library to library mentoring.

7.3 RSA Directors Day – review of survey results (discussion) [Deter]

- The survey yielded 63 responses (48% responded) Interest is high for this and preference is for an in-person event. Reports roundtable was ranked highly as a program offering. The event may be held at Galesburg.

- A working group will be established to work out the details. The event is tentatively set for the second half of September.

- No survey respondents are interested in presenting at an event.

7.4 Setting DAC meeting dates and locations for 2026/2027 (action requested) [Chair]

- Future DAC meetings will be held the second Wednesday in July, October, December, and March at the following locations:

GALESBURG - July

ALPHA PARK (they have a meeting owl) - October

KEWANEE (they have an meeting owl) - December

WASHINGTON - March

8. Committee Development (discussion) [Chair]

8.1 Committee Member comments and talking about projects in your library.

- AMY: Back from medical leave and is on her third access services librarian in 3 months.

- JENNY: submit your application for volunteering for the following open board positions: at large, public over 10k, and western region.

8.2 Guest comments and talking about projects in your library

- No comments

9. Additional Public Comments [Chair]

- Kristin at Pontiac PL needed clarification re: retention of patrons with fines. She may bring it before the Board.

- Alyssa at Morton PL had a patron requesting multiple books. Holds were placed on items owned by school libraries. Maybe when we migrate, school libraries maybe should opt out of holds. Antony said this speaks to the importance of the visits. Schools are the targeted visits this time. They are getting reminders about holds and feedback on cataloging issues. Ongoing support is needed. RSA gives them the option of stopping holds until staff are trained, but there is high turnover and no one calls RSA to update contact information.

- Erica will also be working on a de-duping projects in the near future.

10. Chair's Time, Agenda building for 8 July 2026 meeting

[Chair]

- No comment

11. Adjournment [Chair]

Motion to Adjourn

Motion by Randall Yelverton, seconded by Jenny Jackson,

*Voice vote called: **Motion carried by unanimous vote***

Meeting adjourned at 3:32 pm

Minutes compiled by: Laura Spires, RSA Business and Marketing Coordinator

Minutes Approved by:



Administrative Department Report for 7 July 2026

Membership Updates: Ongoing Topics & One-Offs

Notable Membership Activity

Hamilton Public Library – Received RAILS Automation Grant in May 2025

- Cataloged 3,293 items so far (2500 since February).

Camp Point Public Library - Received RAILS Automation Grant in May 2025

- Cataloged 3,928 items so far (1300 since February).

A-C Central withdrew their elementary school on June 30, 2026.

Bushnell-Prairie City CUSD #170 withdrew on June 30, 2026. They were the last library never to have automated their circulations.

Illini Bluffs Unit District #327 withdrew on June 30, 2026.

Fulton County CUSD #3 did not confirm that they will be withdrawing and remain members.

Spoon River Valley CUSD #4 has added a second branch for their elementary school. They received RAILS Automation Grant to cover the expense of adding the library to WorkFlows. The new branch is ready to go and will start circulating and filling holds when the new school year begins.

RIP Clean Up(dates) – Project Complete!

The RSA Independence Project (RIP) is complete. This will be the last update.

We have *Finished since the March meeting:

- New monitors, headsets, and webcams purchased and rolled out.
- Two mobile data SIMs for off-site and after-hours internet support via iPads purchased.
- Removed the old firewall and all equipment in the Springfield hosting center.

Patron Facing System Updates, Projects, Issues: Ongoing Topics & One-Offs

A running list of major projects patrons are affected by directly or may notice while using the system.

Adding Online Payments to RSACat

In 2015 we started adding the online payments integration to RSACat profiles for full online members. At the time we had 24 public libraries who wished for this integration. No libraries requested it after that. When we subsequently rolled out the RSACat Mobile app a couple of years later, we were able to add online payments for all patrons via that app. Patrons love it and well over 50% of the online payments are made via the RSACat Mobile app.

Maria has started adding the online payment option to all public RSACat profiles that don't have it. She immediately hit a snag and is working with SirsiDynix to correct it. She was able to do a few and is still reaching to members to check your contact details for the website. You'll hear from her prior to, and again when your RSACat profile goes live.

Hoopla - RSACat Integrations

Maria will also restart work with member libraries who have a Hoopla subscription, but do not have Hoopla visible in RSACat. The price will be around \$100 a year. Contact [Maria](#) if you are interested.

Important Ongoing Issues & Staff Workplan Updates

Updates to the RSA Staff Workplan and various other important Issues. Note, to keep the length of this report in check, we'll only report on updates and changes.

The entire Workplan was part of the 7 May 2027 Board package and is available on request.

Important Ongoing Issues or Short-Term Projects:

- In depth library automation system review – watching a sister consortia's RFP proposals for Several system vendors.
- June 2 – 4 for 3 vendor presentation imparted useful information for our consideration

Staff Workplan – Patron Visible Items:

- RSACat (Enterprise/Portfolio server) on the web upgrade.
 - Our Enterprise/Portfolio server which runs RSACat on the web, was updated to the latest version overnight May 31st.
 - Then we reverted back to the old version a week later due to unfortunate conflicts with the new Cloudflare security enhancements SirsiDynix recently made.
- RSACat online catalog – online payments for all public libraries (as discussed above)
- Hoopla RSACat Integrations – (as discussed above)

Staff Workplan – Other Items:

- In person visits – showing the RSA flag in all corners of RSA. This continues with half of the public libraries due to be visited between July 1st and December 31st
- Firewall swap to the new, online firewall.
 - COMPLETE.
 - In addition, all equipment formerly housed in the Springfield CMS hosting facility has been removed, had their hard drives wiped then shredded, and all leftover computer bits were recycled. This was equipment from our 2007 go-live and 2012 server refresh and had no resale value.
- No Transit Item Types – new feature of Symphony/WorkFlows 4.2.
 - A setup and usage plan will be presented for comment at this meeting
- Shared ownership of reports – new feature of Symphony/WorkFlows 4.2.
 - Development work done, on hold for more important projects
- Database cleanup project – working with SirsiDynix to automagically fix some stuff. Report from Erica included in the package.
 - We've signed consulting quotes to have 3 separates, but intertwined, projects done by SirsiDynix.

- Used consulting and project money budgeted in FY26
 - After these are finished, we'll continue to run brief record review and merger operations moving forward
 - This will be discussed at this meeting
- BLUEcloud Circulation – slowly coming to a library near you. 128 users have been configured at 24 member libraries
 - BC Circ was updated overnight May 28th. Should have fixed the patron search box to search both the user's name or ID without swapping settings.
- RSA Directors Day – Directors Only
 - Already 40 registrations as of July 2nd.
- Reports – Reworking End of Month reports and cooking up new Dashboards.
 - First batch of testing reports has gone out to the Reports Working Group. We're working to create short videos and are working on updated Support Site report index pages with short descriptions.
 - You can still volunteer to join the working group! Just let us know.
- BLUEcloud Cataloging – matching and attaching via your browser.
 - Still needs setup work by SirsiDynix before we can start staff testing
- Review, update, replace, remove – the lifecycle of documentation continues.
- Library Automation System Environmental Scan – let's see where the library world is in late 2026.
 - This will help us review the current state of the backend systems, reports systems, and the patron facing systems. Patron facing systems are the easiest to swap out.
- Standardization – After 20 years, this is no longer a bad word in RSA.
- New Executive Director and transition process – knowledge sharing already started.
 - June Board meeting planning discussion. Fall Board meetings major project.
- Additional RSA Staff in calendar 2027 – 2 new positions in planning, +1 for the ED position.
- Strategic Plan 2027 – Independence is ours, what's our plan for the future?
 - Will start work in September after the board approved a Strat Plan Proposal from Amanda Standerfer in June
- Under Construction – library automation system revamp / replacement

Reminder About Library Holds for Hamilton PL and Camp Point PL

Both these new members are paying full RSA membership fees during their cataloging periods. As full members, they are eligible to place system level holds. The RSACat Union List holds page has been updated to include these new members in the selection of hold pickup libraries. The RSA delivery codes cheat sheet and membership list have been updated to show these new, special user IDs.

Staff Updates Since the Previous Meeting

Staff Anniversaries

- Antony Deter – 3 years in June
- Lisa Schemensky – 9 years in July

Misc Staffing Notes

- We continue to train our four new staff members. Great progress for everyone.
- Kendal continues to schedule time blocks with Mason and Maria to train various items.

- Blocking out time appears to be the best solution to busy schedules.
- Kendal has presented two Symphony U courses to the entire RSA Staff. We've covered
 - Library Policies, which are quite a bit more involved than just a line saying P8_NORTH. Item policies, item types, item categories, etc. was the second course.
 - User policies next which are very complicated.

<i>Completed RSA Events March through June: Training & Visits</i>
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Training sessions or member visits can be either in-person, virtual, or in some cases, both. There were 60 sessions lasting 95 hours with 248 total attendees.

Location	Campaign Name	Campaign Type
Danvers TL	FY26 New Director Visit	Member Services
Mercer County SD #404	Cataloging Site Visit	Cataloging
Unity CUSD	Routine Visit Unity HS	Member Services
Winchester CUSD #1 - Elementary School	Cataloging Site Visit	Cataloging
Winchester CUSD #1 - High School	Cataloging Site Visit	Cataloging
Roanoke-Benson CUSD #60 High School	Cataloging Site Visit	Cataloging
Alpha Park PLD	FY26 New Manager Visit	Member Services
Galva CUSD 224 Elementary School	Cataloging Site Visit	Cataloging
Galva CUSD 224 High School	Cataloging Site Visit	Cataloging
Teams	FY26 BCCirc training	Member Services
Galva Public Library District	Cataloging Drop-In	Cataloging
Delavan CUSD	Routine Visit Delavan	Member Services
Teams	FY26 Holds Workshop	Member Services
Virginia CUSD #64	Cataloging Site Visit	Cataloging
Online	Chenoa PL BCC Training	Member Services
Beardstown CUSD Gard Elementary	Routine Visit BB2	Member Services
Blessing-Rieman College of Nursing	Cataloging Site Visit	Cataloging
Quincy Notre Dame HS	Cataloging Site Visit	Cataloging
Online (Teams)	Basic WorkFlows Cataloging Workshop	Cataloging
Carthage Public Library District	Cataloging Drop-In	Cataloging
Peoria Public Library - Main	Item Group Editor Training	Cataloging
Abingdon - Avon District 276 - HS	Cataloging Site Visit	Cataloging
Beardstown CUSD #15 - Junior/Senior High Media Center	Cataloging Site Visit	Cataloging
Havana Jr HS (also Havana HS)	FY26 Routine visit	Member Services
Mason Memorial LD	Supplemental Cat Visit	Cataloging

Spoon River College Outreach Center in Macomb IL	RSA Day 2026	Other
Illinois Valley Central UD #321 - Jr High and Elementary Center	Cataloging Site Visit	Cataloging
Teams	Basic Circ Workshop	Member Services
Mt. Hope-Funks Grove PL	Visit with MHFG	Member Services
Teams	FY26 Holds Workshop	Member Services
Teams	FY26 Holds Workshop	Member Services
Illinois Valley Central UD #321 - High School	Cataloging Site Visit	Cataloging
Illinois Valley Central UD #321 - South School	Cataloging Site Visit	Cataloging
Heyworth PLD	BCC Training Heyworth	Member Services
Abingdon-Avon HS	FY26 New Director Visit	Member Services
Kewanee HS	FY 26 Routine Visit	Member Services
Graham Hospital School of Nursing	Routine Visit Graham Hospital	Member Services
IVC UD #321 - Mossville Junior High and Elementary Center	Cataloging Site Visit	Cataloging
Odell PLD	Basic WorkFlows Cataloging Workshop	Cataloging
Central HS Camp Point	FY26 Routine Visit	Member Services
Fondulac District Library, Kolb Memorial Conference Room	RSA Day Committee Meeting	Governance
Marquette Hts. PL	FY26 BCCirc Training	Member Services
Teams	Basic Circulation Workshop	Member Services
Microsoft Teams	RSA Bibload Workshop	Cataloging
Teams	FY26 Holds Workshop	Member Services
Chillicothe PLD	Cataloging Site Visit	Cataloging
Microsoft Teams	Modify Title Training	Cataloging
Online (Teams)	Basic WorkFlows Cataloging Workshop	Cataloging
Henry-Senachwine CUSD #5 Grade School	Routine Visit Henry-Senachwine Grade School	Member Services
Camp Point Public Library	Camp Point Patron Entry Training	Member Services
Teams	Modify Title Training	Cataloging
Chenoa Public Library District	RSA Cataloging Chat (In-person)	Cataloging
Microsoft Teams	Modify Title Training	Cataloging

Graham Hospital School of Nursing	Supplemental Cat Visit	Cataloging
Teams	RSA Cataloging Chat (Online)	Cataloging
Microsoft Teams	Cataloging Training	Cataloging
Teams	Basic WF Workshop	Member Services
Teams	FY26 Holds Workshop	Member Services
Microsoft Teams	Basic WorkFlows Cataloging Workshop	Cataloging
Peoria North	FY26 BCCirc Training	Member Services

8-2-2 Overdue Bill Structure summary & draft

Bill Structures In Use	New Code	Circ Map lines Using them	Daily Fine	Max	Days it will take to get to the maximum
AC	AA	4	0.05	1.00	20
AH	AD	6	0.05	5.00	100
AL	AJ	1	0.05	25.00	500
BE	BB	9	0.10	2.50	25
BF	BC	5	0.10	3.00	30
BH	BD	20	0.10	5.00	50
BT	BE	4	0.10	6.00	60
BI	BG	7	0.10	10.00	100
BL	BJ	1	0.10	25.00	250
BB	BU	2	0.10	Unl	Unlimited
DH	CD	4	0.20	5.00	25
EH	DD	5	0.25	5.00	20
EI	DF	2	0.25	7.50	30
FE	EB	1	0.50	2.50	5
FH	ED	4	0.50	5.00	10
FU	EE	1	0.50	6.00	12
FB	EU	1	0.50	unl	Unlimited
GH	FD	11	1.00	5.00	5
GT	FE	2	1.00	6.00	6
GI	FG	5	1.00	10.00	10
GK	FI	1	1.00	20.00	20
GL	FJ	3	1.00	25.00	25
GQ	FJ	1	1.00	50.00	50
II	GG	1	2.00	10.00	5
IT	GH	1	2.00	12.00	6
IB	GU	1	2.00	unl	Unlimited
LH	HD	1	5.00	5.00	1
LK	HI	2	5.00	20.00	4
LL	HJ	4	5.00	25.00	5
LQ	HK	2	5.00	50.00	10
LU	HL	1	5.00	80.00	16
LR	HM	4	5.00	100.00	20
NO	NO	728	None	0.00	None
X1	XD	1	0/0.05	5.00	#VALUE!
X2	XG	1	0/0.05/0/1.00	10.00	#VALUE!

First Letter	Amount	Second Letter	Amount2
A	0.05	A	1.00
B	0.10	B	2.50
C	0.20	C	3.00
D	0.25	D	5.00
E	0.50	E	6.00
F	1.00	F	7.50
G	2.00	G	10.00
H	5.00	H	12.00
X	STAGGERED	I	20.00
		J	25.00
		K	50.00
		L	80.00
		M	100.00
		U	Unlimited

Currently 271 bill structures in WF
Only 35 are being used



No-Transit Item Types and Cataloging Methods Overview

Updated: 6 July 2026

No-Transit Items, A New Feature

Symphony 4.2 introduced a new No-Transit items feature that is set system wide, at the item type level. Now, each item type is set as either transitable or not transitable. For simplicity, we are creating additional item types to enable the No-Transit functionality. All of these begin with **NT-** to ensure they are easy to spot in WorkFlows by staff placing holds and help with consistent cataloging.

General Labeling Recommendation

The survey respondents suggest that all no-transit items should have a very visible label placed the item directly, or on the item's container, or as a last resort provided by library staff at time of check out. The label should clearly explain that this item must be returned to the checkout library only. This will help patrons remember what must be returned at the checkout library and may help other member libraries see items on drop-off that should not be returned to that location. This will be especially useful to libraries with multiple branches where the item is expected to be returned to the specific checkout branch.

No Automatic Patron Billing for Incorrect Dropoff Library

The majority of respondents and commentors, about 70%, preferred no automatic bill for returning items to the wrong library. If a member library wishes to bill for incorrect drop-offs, we can create a new bill type (something like NTRANS-RET) in the system and bills can be manually placed.

Item Types Survey Results

The no-transit survey inputs showed the most commonly mentioned items as follows.

Item Type	Mentions	Examples from Responses
Hotspots/Wi-Fi Devices	7+	EQUIP-NET, Wi-Fi Hotspot, Laptops/Hotspot combos
STEM/Learning Kits	6+	STEM Kits, STEAM Kits, Citizen Science kits, Osmo kits
Puzzles	5+	TOY item type, board puzzles
Board Games	5+	GAME item type, tabletop games
Rokus/Streaming	4+	EQUIP-STRM, Roku devices
Chromebooks/Laptops	4+	Chromebooks, laptops for checkout
Tonies/Audio Players	4+	Tonie boxes, Tonie figures, YOTO players
Memory/Dementia Kits	3+	Memory Kits, Dementia kits, Stay Sharp Kits
Projectors/AV Equipment	3+	Mini Projector, tripod, Outdoor Movie Kit
Fishing Poles/Outdoor	2+	Fishing poles, Disc Golf, yard games

Analysis of all survey inputs, plus items marked as local or no holds only, and a few non-circulating but overridable in the circ map, were used to build out categories of like items. We believe the following categories of items will cover all the current and expected future things that may need to be cataloged as no-transit items. There is significant overlap in some of these categories which will allow individual libraries to choose how best to catalog their collection. We are working to create several standardized item types that are generic enough to cover all situations, while still leaving specific cataloging decisions to the individual libraries.

No-Transit Standardized Categories and Item Types

1. **Laptops & Network Equipment:** Laptops, Chromebooks, Wi-Fi Hotspots, Laptop/Hotspot combo bundles, etc.
 - NT-COMP-1
 - NT-COMP-2
2. **AV & Media Electronics:** Projectors, Tripods, Rokus, GoPros, Blu-ray players, External disc drives, CD Walkmans, Microphones, Webcams, Ring lights, Headphones, Bluetooth adapters/transmitters, Audio cables, Outdoor Movie kits, etc.
 - NT-AV-EQ-1
 - NT-AV-EQ-2
3. **Educational, Sensory, & Theme Kits:** STEM/STEAM kits, Osmo, Early Literacy, Story Time boxes, Phonics kits, Memory/Dementia/Stay Sharp kits, Sensory kits, Citizen Science kits, CPR kits, etc.
 - NT-KIT-ED1
 - NT-KIT-ED2
4. **Games & Puzzles:** Board games, Puzzles, Nintendo Switch consoles, Joy-Cons, etc.
 - NT-GM-PZ-1
 - NT-GM-PZ-2
5. **JUV/Youth Electronics & Toys:** Tonieboxes & Tonie figures, Yoto Mini players, Playaway Launchpads, American Girl dolls, STEM toys, Remote control robots/cars, etc.
 - NT-J-TOY-1
 - NT-J-TOY-2

6. **Library of Things & Specialty Tools:** Cake pans, Metal detectors, Radon detectors, Appliance load testers, Medical devices (Blood pressure/oxygen monitors, crutches), Bike repair kits, Museum and zoo passes, etc.
 - NT-LIBOT-1
 - NT-LIBOT-2
7. **Outdoor Recreation & Sports:** Fishing poles, Disc golf sets, Yard games, Bird watching kits, Telescopes, Ghost hunting kits, etc.
 - NT-OUTSD-1
 - NT-OUTSD-2
8. **Reference, Special Collections, & Oversized:** Local history, Genealogy, Old/Delicate books, Fragile or high-cost items, Oversized/Coffee table books, Other bulky/heavy items that could cause transit issues, etc.
 - NT-REFSP-1
 - NT-REFSP-2

Cataloging Considerations for No-Transit Items

If your library wishes to use No-Transit Item Types, please email the [Help Desk](#) and we will work with you to set up the applicable BRIEF-NT title records, circ and hold rules for the new no-transit item type(s), and ensure the new item types are added to your WorkFlows menu. If you have existing items in the system you wish to convert to No-Transit items, contact RSA and we will work with your to update the title record to a BRIEF-NT format.

- Each no-transit item should be attached to a brief record using the BRIEF-NT record format. This format will allow these records to be excluded from RSA's ongoing brief record cleanup and the monthly process to batch update OCLC holdings.
- Each BRIEF-NT title record is specific to the individual pickup/dropoff library for that particular item. The specific pickup/dropoff branch **MUST** be included in the title of the BRIEF-NT record.
 - o Note: these items are the only items to break the RSA rule about cataloging on existing records if possible.
 - o For example, if Peoria has laptops for pickup/return only at North and laptops for pickup/return only at Main, they would need to create two BRIEF-NT records, one per pickup/return location.
 - LAPTOP : FOR CHECKOUT AND RETURN ONLY AT PEORIA MAIN BRANCH
 - LAPTOP : FOR CHECKOUT AND RETURN ONLY AT PEORIA NORTH BRANCH

- Only your library's (or a particular branch's if you have branches) no-transit items should be attached to your BRIEF-NT records for two reasons:
 - o Staff will more easily understand why the WorkFlows pickup library menu changes when holds are placed on these items.
 - o Patrons will understand why the item can only be picked up and returned at the owning library when they find one of these items in the RSACat. The title of the brief record will clearly indicate pickup and return at X library. RSACat should not allow the hold to be successfully placed until the patron selected the correct pickup location.
- Each no-transit item must be assigned a no-transit item type, for example NT-OUTSD-1 for outdoor recreation and sports items.
- Reach out to the Help Desk for RSA to help you if:
 - o The no-transit item is not yet cataloged in WorkFlows, and you would like it cataloged on a BRIEF-NT record with enhanced bibliographic description, beyond the title and the general note.
 - o The no-transit item is already cataloged in WorkFlows on an OCLC record.
 - o The no-transit item is already cataloged in WorkFlows on a brief record, and there are other libraries attached.
 - o The no-transit item is already cataloged in WorkFlows on a brief record that only your library is attached to.
- Any item currently entered in our system needs to have both the Title record modified and the attached items modified.

Example No-Transit Titles and Items In Symphony and RSACat

Two example title records are entered in the system now using the retired new Blu-ray codes.

- TELESCOPE : FOR CHECKOUT AND RETURN ONLY AT RESOURCE SHARING ALLIANCE
- CROQUET SET : FOR CHECKOUT AND RETURN ONLY AT RESOURCE SHARING ALLIANCE

Item Search and Display x

Item Search and Display

TELESCOPE : FOR CHECKOUT AND RETURN ONLY AT RESOURCE SHARING ALLIANCE

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

Shadow title: N

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc		Entrd	260624	Dat_Tp	n	Date1	
Date2		Ctry		Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction	0	Biog	
Lang	eng	Mod_Rec		Source	u		

Label	Tag	Ind.	Contents
Title	245	00	TELESCOPE : FOR CHECKOUT AND RETURN ONLY AT RESOURCE SHARING ALLIANCE.
General Note	500		This Gysker Astronomical Refracting Telescope for beginners checks out with a carrying bag, phone adapter, and wireless remote.
Cataloger Email	592		Leave as brief.
Held by	596		AG_ALS-PDC

These are the same two records as shown in RSACat. Also note the search term in the screenshot used to find all no-transit items in the system that follow the cataloging rules.

Welcome [User] | Log Out | My Account | My Lists | Library Information | Select Language | ?

Flanagan Public Library District RSACat
Libraries Delivered

All RSA Libraries (No eBook) All Fields For checkout and return only at Search Advanced Search

Search Results Flanagan PLD (no eBooks) Juvenile (no eBooks) eBooks & eAudio All RSA Libraries (no eBooks) Online Articles

Limit Search Results

Format ☐ Include ☐ Exclude (2)

Reading Level ☐ Include ☐ Exclude (2)

Added When ☐ Within the Past Week (2)

Fiction / Non-... ☐ Include ☐ Exclude (2)

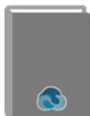
Language ☐ English (2)

Library ☐ Resource Sharing Alli... (2)

Genre ☐ Not Defined (2)

Sub-genre ☐ Not Defined (2)

2 Results Found Actions: Sort By:

1.  **TELESCOPE : FOR CHECKOUT AND RETURN ONLY AT RESOURCE SHARING ALLIANCE.**
Call Number: TELESCOPE
Format: Blu-ray
Holds: 0
System Copies: 1 - Available:
No copies available at Flanagan PLD, 1 copies available at other libraries
Place Hold Cite This Item Show Details

2.  **CROQUET SET : FOR CHECKOUT AND RETURN ONLY AT RESOURCE SHARING ALLIANCE.**
Call Number: CROQUET SET
Format: Blu-ray
Holds: 0
System Copies: 1 - Available:
No copies available at Flanagan PLD, 1 copies available at other libraries
Place Hold Cite This Item Show Details

2 Results Found Actions: Sort By:

Copyright 2026 Resource Sharing Alliance
Copyright 2023 Sirsi Corporation - Portfolio Version 5.2.1.2



2 July 2026

Rethinking WorkFlows Item Categories 4 & 5

Item Category 4 currently contains 733 codes in its WorkFlows menu, while Item Category 5 is even larger with 903 codes. Item Category 4 is intended to represent the item's primary genre or topic. Item Category 5 is considered to be the item's secondary genre or topic. New Item Category 4 and 5 codes are created in response to requests from RSA member libraries.

Below are thoughts about rethinking Item Category codes so the WorkFlows menus are not as unwieldy to use, and there is consistency in how some codes are assigned, improving discoverability.

- Any Item Category 4 or 5 code not currently assigned to any items will not be created during an in-place migration or a migration to a new database.
- The same code will not be created in more than one Item Category menu.
- Item Category 1 will continue to be used to indicate whether the item is fiction, nonfiction, or equipment.
- Item Category 2 will continue to be used to indicate the item's reading, viewing, or listening level.
- Item Category 3 will continue to be used to indicate the item's general format.
- Item Categories 4 and 5 will continue to include codes for various topics and genres, such as MYSTERY, ROMANCE, SCI-FIC, WESTERN, BIOGRAPHY.
- Item Category 6 will continue to have OCLCEXCLUD for items whose holdings should not be updated in OCLC WorldCat during RSA's monthly updates.
- Item Categories 7-10 are not currently used, but they could start to be during an in-place migration. Here are some ideas:
 - Item Category 7 – accelerated reading levels
 - Item Category 8 – award winners and nominees
 - Item Category 9 – holidays
 - Item Category 10 – TV, movie, and ESRB ratings

There are many more possibilities than what it listed here.

There are two downsides to utilizing Item Categories 7-10 more fully:

- Item Categories 7-10 are not currently configurable as facets for patrons to use to search the RSAcat.
- Item Categories 7-10 are not easily reportable in BLUEcloud Analytics.



29 June 2026

Brief Record Cleanup: What RSA is Doing & What Your Library Can Do to Help

With approximately 58,000 brief records currently in WorkFlows (or about 5.5% of the approximately 1,054,000 total bibliographic records), RSA seeks to improve the bibliographic quality of our database to improve discoverability not just in WorkFlows but also in the RSACat. Discoverability is an RSA core principle. Improved discoverability leads to a positive patron experience. Patrons can successfully find the items they want to check out or place on hold if they are cataloged using quality bibliographic description.

The backlog of nearly 58,000 brief records would take the RSA Bibliographic Services Department approximately 30 years to upgrade to OCLC records with full bibliographic description, and that timeline would only be true if no new brief records were created. Because manually upgrading each of these brief records is impossible, RSA is working with SirsiDynix this summer to develop and conduct four phases of brief record cleanup:

1. One-time project: SirsiDynix will add the equivalent 13-digit ISBN to OCLC records that currently only have the 10-digit ISBN. The 10-digit ISBN will be kept on the record. Nearly 242,000 OCLC records in WorkFlows need updated to include the 13-digit ISBN. Adding the 13-digit ISBN will increase the likelihood of brief records matching OCLC records during the subsequent phases of the brief record cleanup.
2. Routine monthly project: Batch convert 10-digit ISBNs to their 13-digit equivalents on brief records in WorkFlows, both in the title control number and 020 fields. The 10-digit ISBN will be removed in both fields. Editing the 10-digit ISBN to the 13-digit equivalent will increase the likelihood of that brief record matching an OCLC record. Using the 13-digit ISBN will also allow the brief record to be overlaid if a matching OCLC record is imported into WorkFlows at some point.
3. Routine monthly project: Merge duplicate brief records together in WorkFlows that match based on title, author, and standard number (i.e., ISBN, ISSN, or UPC).
4. Routine monthly project: Transfer brief items to OCLC records in WorkFlows where the titles, authors, and standard numbers match. The brief record will be deleted once its items are transferred to the matching OCLC record.

In phases three and four, brief items will not be considered for cleanup if they are assigned at least one of the following:

- Rental, co-op, interlibrary loan, lease, on-order, and non-transitable item types
- Discard, interlibrary loan, lost, missing, on-order, and rental home locations
- Discard, lost, and missing current locations
- Lease and rental item cat 4
- Co-op and lease item cat 5

Once phases two through four of the SirsiDynix brief record cleanup are running monthly, RSA will investigate using Snapicat, an open-source cataloging tool developed by the Boston Public Library to search OCLC WorldCat to find and download potential matching records using bibliographic information on a spreadsheet. Snapicat may be useful to search WorldCat for potential matches for brief records that have standard numbers but were unable to be processed by the SirsiDynix cleanup.

RSA will also explore partnering with the Cataloging Maintenance Center (CMC) to upgrade brief records to OCLC records with full bibliographic description. The CMC's assistance may be helpful for brief records that lack standard numbers and are therefore unable to have potential matches found for them during the SirsiDynix or Snapicat processing.

Here is what your library can do to help:

- The RSA Bibliographic Services Department is reaching out to libraries to ask them to check their shelves and consider removing two types of brief items:
 1. Those brief items that have never checked out in WorkFlows
 2. Those brief items that have not checked out in the past ten years since January 1, 2016

Watch for an email this summer if your library has any brief items that fit these criteria. If the items are not missing or lost, RSA can batch remove them from WorkFlows once you give us permission. If Zac does not hear back from you, your library's brief items will be left as is in WorkFlows.

Some brief items, such as equipment, reference, and special collections, are in-library use only and may not check out. Even if you plan to keep these items, checking your collection to ensure you still have them and discarding them if not would be a good idea.

- The RSA Bibliographic Services Department can create a list of the genealogy and local history items in your collection that may be eligible for free CMC cataloging service. Email help@librariesofrsa.org if you are interested in a report of your items that are potentially CMC eligible. On the [CMC home page](#) look for the "Sending an Item to the CMC" section for submission instructions.

Please direct any questions about RSA's brief record cleanup efforts or what you can do to help to help@librariesofrsa.org or 1-866-940-4083.