

How to Catalog Die Shapes and Sets in WorkFlows

Revised August 14, 2015

This cheat sheet is posted at <http://alsrsa.org/client/search/asset/3902>

Considerations before you begin cataloging:

You will assign the EQUIP-MISC item type when cataloging a die shape or set in WorkFlows. Before you begin using the EQUIP-MISC code, you must contact James at rsahelp@railslibraries.info or 1-866-940-4083. For the item type EQUIP-MISC, James will need to know:

- Its loan period
- If it can be renewed
- If fines will be charged, and if so, the maximum fine amount that can be charged
- How many die shapes or sets can be charged out at one time by the same patron
- If all holds, local holds only, or no holds can be placed on it

Are any of these WorkFlows menus customized to only include the codes your library assigns to its collection?

- Home location
- Item type
- Item category 1
- Item category 3
- Item category 4
- Item category 5

If any of these menus are customized, contact Amanda (rsahelp@railslibraries.info or 1-866-940-4083) to edit the menu to include the following codes for die shapes:

- Item type code: EQUIP-MISC
- Possible home location codes for die shapes and sets are listed below. Those home location codes that are non-holdable (cannot be placed on hold) are indicated below. Pick the home location code(s) that will work best for organizing your die shapes and sets. The complete list of home location codes is posted at <http://bit.ly/rWpSkK>.
 - CONF-ROOM
 - DESK-CIRC (non-holdable)
 - DESK-C-HLD
 - DESK-REF (non-holdable)
 - DISPLAY
 - EQUIP
 - NONFICTION
 - OFFICE (non-holdable)
 - SPECCOLL
 - WORK-RM (non-holdable)

Other codes that should appear in your WorkFlows menus before you begin cataloging the dies:

- Item category 1 code: EQUIPMENT
This item cat 1 code should already appear in your menu.
- Item category 2 code: EQUIPMENT
This item cat 2 code should already appear in your menu.
- Item category 3 code: EQUIPMENT
- Item category 4 code: DIESHAPE or DIESET
Which item cat 4 code you will use depends on if you are cataloging an individual die shape or a set of dies that will be assigned one barcode and circulate as a single unit.
- Item category 5 code: DIE-ACUCUT or DIE-ELLISN
If you do not see the brand of die you will catalog in the item cat 5 menu, please contact Erica at rsahelp@railslibraries.info or 1-866-940-4083 to submit the item cat 5 code you need.

To create the catalog record for the die shape or set:

1. Log into WorkFlows using your library's TECH login or your individually named WorkFlows login if you have been assigned one of these logins with brief record access.
2. Open the Cataloging module.
3. On the left, open the Call Number and Item Maintenance wizard.
4. In the title field, enter a short description of your die set or shape to see if an existing record that matches your die shape or set is already entered into WorkFlows. Ensure the library is set to "all" after you enter the title, before you search.
5. If WorkFlows retrieves a potential matching record for your die shape or set:
 - a. Check the record's bibliographic tab. Use the size mentioned on the record and/or the description at the URL link to verify that the existing record matches your die. Note that not all records contain size information or URLs.
 - b. If you are able to verify that the record matches your die, go to the Call Number/Item tab of the record.
 - c. Click Add Call Number and ensure your library's WorkFlows code appears in the "Add Volume" box.
 - d. Skip to step 9 of this document for instructions how to enter the call number/item information for your die.
6. If you are unable to find an existing matching record for your die, or if you are unable to verify that the existing record matches your die, click the arrow on the left side of the screen to expand the Titles group, if it is not already expanded.
7. Open the Add Title wizard on the Titles group.

8. On the Bibliographic screen:
 - a. Go to the line labeled "Title 245."
 - b. Under "Contents" for the 245 line, delete the auto-generated text ****REQUIRED FIELD****
 - c. Turn your Caps Lock key on. All words on this screen must be entered in upper case.
 - d. Under "Contents" for the 245 line, enter the brand of your die first, followed by "SHAPE" or "SET" (without quotes), depending on if you will catalog a set of dies or an individual die shape.

Examples:

ACCUCUT DIE SET
 ACCUCUT DIE SHAPE
 ELLISON DIE SET
 ELLISON DIE SHAPE

- e. After you enter SHAPE or SET in the title, type a colon, followed by one space, and then enter short description of the die set or shape.

Examples:

ACCUCUT DIE SET: 3-INCH ALPHABET LETTERS
 ELLISON DIE SHAPE: BOAT

- f. If a description of the die is available on the manufacturer's web site:
 - Go to the bibliographic tab of the record.
 - Place the cursor on the last line of the record.
 - Right click.
 - Select "Add field after."
 - In the field labeled "Undefined":
 1. Under "Tag" enter 856
 2. Under "Ind." enter 42
 3. Under "Contents" enter |u
 To create the pipe (|) delimiter, simultaneously press <Shift> and < \ > on your keyboard.
 4. Search for the description of the die on the manufacturer's web site.
 5. Copy the URL for the die description by simultaneously pressing <Ctrl> + <c> on your keyboard.
 6. Go back to the bibliographic tab of the brief record.
 7. Under "Contents", directly following the |u (no space), insert the copied URL by simultaneously pressing <Ctrl> + <v>.
 8. Directly following the URL (no space), insert:
 |zClick this link to access description of die

Example:

|u<http://www.ellisoneducation.com/product/13650-LG/ellison-surecut-die-horse-1-large>|zClick this link to access description of die

- g. Leave the other fields on the bibliographic screen blank.

9. On the Call Number/Item tab:

- a. Call Number: Type AD (for AccCut Die), ED (for Ellison Die), etc., followed by a short description or a number assigned to the die shape or set. Thirty-two characters, including spaces, may be entered into the call number box.

Example call numbers:

- AD 3-IN LETTER SET
 - AD 3-IN LETTER E
 - AD BOAT
 - AD #12
- b. Class scheme: DEWEY
 - c. Call library: your library's WorkFlows code
 - d. Item ID: Either type or scan in the barcode number assigned to the die set or shape.
 - e. Type: EQUIP-MISC
 - f. Item Library: your library's WorkFlows code
 - g. Home Location: Select a code from the drop-down menu. See the first page of these instructions for a list of possible home location codes.
 - h. Item category 1 code (*required*): EQUIPMENT
 - i. Item category 2 code (*required*): EQUIPMENT
 - j. Item category 3 code (*required*): EQUIPMENT
 - k. Item category 4 code (*strongly recommended*): DIESHAPE or DIESET
Which item cat 4 code you will use depends on if you are cataloging an individual die shape or a set of dies that will be assigned one barcode and circulate as a single unit.
 - l. Item category 5 code (*optional*): DIE-ACUCUT, DIE-ELLISN, or other brand that matches your die
 - m. Media desk: Leave this box blank.
 - n. Number of pieces: Edit this number if another item, such as a bag, will circulate with the die as one unit at check-out. Also edit this number if you are cataloging a die set with multiple pieces that will be assigned a single barcode, and all pieces will check out together as one unit.
 - When the die shape or set is returned, a pop-up box will alert circ staff that multiple pieces are being returned. Staff must enter the override password (i.e., RSA) to close the pop-up. If all of the pieces are not returned, staff should cancel the return and contact the patron.
 - ***Do not enter a number greater than 1 in the number of pieces box if your library will allow the dies to be checked out on a self-checkout machine!***
 - o. Price: Enter the replacement cost for the die shape or set. If you do not enter a price, the RSA default price of \$100 will be used if you need to charge a patron to replace the die.
 - p. Place a check mark in the Shadow Item box if you do not want the die to be visible to patrons in the RSAcat.
 - q. Extended Information: Enter additional information about the die shape or set. Use of the extended information notes is optional.
 - CIRCNOTE: This note will appear as a pop-up when the item is discharged. It does not require entry of the override password in order to close the pop-up.

- PUBLIC: This note is visible to patrons on the item details page in the RSAcat. Enter the manufacturer item number if available:
Example:
#13480-LG
- STAFF: This note only appears when the item is viewed in WorkFlows. Use for special instructions to library staff members.
Example:
Dies kept in Children's Workroom

10. Click the Save button on the bottom of the screen.

11. Click on the Control tab at the top.

12. Change the Record Format to EQUIP. Nothing else needs to be changed on this screen.

Questions about cataloging die shapes?

Send an email to rsahelp@railslibraries.info, directed to the attention of Rhonda or Erica. Call 1-866-940-4083 and ask to talk to Rhonda or Erica.