

## Considerations for WorkFlows Item Category 1

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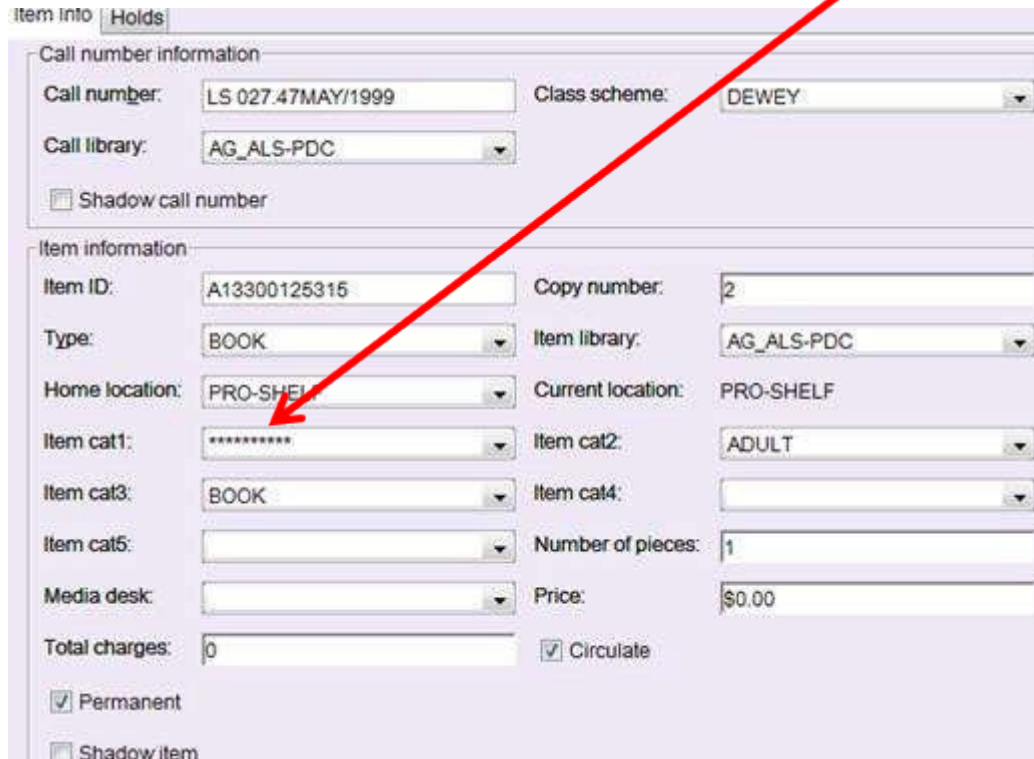
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### **Purpose of the revised item cat 1 menu:**

On March 7, 2014, RSA limited your item cat 1 menu to encourage you to begin using item cat 1 only to indicate if the item's content is fiction or nonfiction. If an item does not have content that can be read, listened to, or watched, please assign the EQUIPMENT item cat 1 code, which describes not just equipment, but other types of three-dimensional objects as well. All five item categories (fiction/nonfiction in item cat 1, reading level in item cat 2, general item format in item cat 3, genre in item cat 4, and sub-genre in item cat 5) will be search options in both the Traditional RSACat and the RSACat Discovery to improve searching for patrons and help them narrow search results.

### **Display of former item cat 1 codes in WorkFlows:**

If an item in your collection is assigned an item cat 1 code, such as HOLIDAY, that has been removed from your item cat 1 menu, the item will display asterisks ( \*\*\*\*\* ) as its item cat 1 in WorkFlows. The code removed from the item cat 1 menu is no longer available to display in WorkFlows, so asterisks display instead.



The screenshot shows the 'Item Info' tab in a WorkFlows interface. The 'Item information' section contains the following fields:

- Call number information: Call number (LS 027.47MAY/1999), Class scheme (DEWEY), Call library (AG\_ALS-PDC), Shadow call number (checkbox).
- Item information: Item ID (A13300125315), Copy number (2), Type (BOOK), Item library (AG\_ALS-PDC), Home location (PRO-SHELF), Current location (PRO-SHELF), Item cat1 (\*\*\*\*\*), Item cat2 (ADULT), Item cat3 (BOOK), Item cat4 ( ), Item cat5 ( ), Number of pieces (1), Media desk ( ), Price (\$0.00), Total charges (0), Circulate (checkbox checked), Permanent (checkbox checked), Shadow item (checkbox).

Although you are no longer able to see codes other than EQUIPMENT, FICTION, NONFICTION, UNDEFINED, and UNKNOWN in your item cat 1 menu, the items in your collection are still assigned the codes, such as HOLIDAY, that formerly appeared in your item cat 1 menu. RSA did not erase the item cat 1 codes from WorkFlows that were originally assigned to your collection.

### **Setting default properties for item cat 1:**

I recommend setting your default item cat 1 code to FICTION or NONFICTION in the properties of the Call Number and Item Maintenance and Add Title wizards in the WorkFlows cataloging module. For instructions how to set properties in these two wizards, please see pages 3-4 in the WorkFlows cataloging module set-up guide, posted at <http://alsi.sdp.sirsi.net/client/RSWebsite/search/asset/721>.

Be sure to completely shut WorkFlows after you set your default item cat 1 properties to either FICTION or NONFICTION. Click "Yes" when WorkFlows asks if you want to save changes to the properties. If you click "No," the default item cat 1 properties will not be saved the next time you log into WorkFlows.

### **Searching for items assigned item cat 1 codes no longer in your WorkFlows menu:**

Many of the codes formerly in the item cat 1 menu now appear in either the item cat 4 menu, which indicates the item's genre, or the former item cat 1 codes now appear in the item cat 5 menu, which indicates the item's sub-genre. Looking at item cat 1 codes your library assigned to its collection can help you identify items to edit to use the new item cat 4 or 5 codes. The former HOLIDAY item cat 1 code, for example, now appears in the item cat 4 menu. Below are links to the item cat 4 and 5 lists so you can see if item cat 1 codes you used now appear on these lists:

Item cat 4 list: <http://alsrsa.org/client/search/asset/3862>

Item cat 5 list: <http://alsrsa.org/client/search/asset/3863>

Assigning item cat 4 codes to items is strongly recommended, while assigning item cat 5 codes is optional.

To find items assigned cat 1 codes, such as HOLIDAY, that are no longer in your WorkFlows menu, please see the instructions posted at <http://www.alsrsa.org/client/RSWebsite/search/asset/4042>. These same instructions can also be found on pages 26-32 in the longer item group editor instructions with the February 26, 2014 revision date on the first page. This version of the item group editor instructions is posted at <http://alsi.sdp.sirsi.net/client/RSWebsite/search/asset/2701>. The document may take a minute or two to open due to its size.

If your library has completed item group editor training, your library (*not per staff member at your library*) may modify up to 5,000 items per day in the item group editor. It is important to carefully track your number of edits in the item group editor to ensure you do not cause indexing trouble in WorkFlows by exceeding the 5,000 item per day limit. If you have a day when you would like to modify more than 5,000 items in your collection, please let me know in advance. We can make sure you can do a larger number of edits that day in the item group editor.

### **Learning how to use the item group editor:**

If you are interested in learning how to use the item group editor to batch change items in your collection, item group editor workshops have been scheduled this spring on the dates below:

Tuesday, March 25<sup>th</sup> from 9:30 am to 1:00 pm at the RAILS East Peoria office – Register at <http://www.librarylearning.info/events?eventID=16173>

Friday, April 25<sup>th</sup> from 1:00 pm to 4:30 pm at the RAILS East Peoria office – Register at

<http://www.librarylearning.info/events?eventID=16175>

Wednesday, April 30<sup>th</sup> from 9:30 am to 1:00 pm at the Carthage Public Library District (500 Wabash Avenue in Carthage, Illinois) – Register at <http://www.librarylearning.info/events/?eventID=17236>

If you are unable to attend a workshop, please get in touch with me to schedule item group editor training at your library. I'm currently scheduling training for May and June.

Please note Union List RSA libraries do not have access to the item group editor in WorkFlows. If you work at a Union List library, please contact me to discuss options for editing item categories in your collection. You can send a message to [rsahelp@railslibraries.info](mailto:rsahelp@railslibraries.info), directed to Erica's attention, or call 1-866-940-4083 and ask to talk to Erica.

**Reports of items assigned former cat 1 codes:**

At the end of each month, Kendal posts many reports of how your collection is cataloged on the Monthly Statistics Reports page at

<http://alsi.sdp.sirsi.net/client/RSAwebsite/?rm=MONTHLY+STATIS0%7C%7C%7C1%7C%7C%7C0%7C%7C%7Ctrue>. To open a report from this page, please click on its blue hyperlinked title. Most reports should

open as a PDF with an index on the left side. You can click the name of your library in the index to jump to the section of the report for your library's collection. *If you print the report, be sure to select only the page numbers for your library's report to avoid printing the entire report for all libraries that is hundreds of pages long.*

You can also use Web Reporter or Director's Station to run reports of your items that are assigned item cat 1 codes that have been removed from your WorkFlows menu. The reports can help you identify items that need their item category codes edited. Please note that reports no larger than 10,000 items should be run in Web Reporter. Reports that exceed 10,000 items may crash Web Reporter.

If you have questions about how to run a report, or if you would like to request reports of your items assigned former item cat 1 codes, please get in touch with Wendy. She can also run a shelf list of your entire collection, sorted by call number, item cat 1, or another cataloging code, to help you identify batch changes for your items. You can send an email to [rsahelp@railslibraries.info](mailto:rsahelp@railslibraries.info), directed to Wendy's attention, or call 1-866-904-4083 and ask to talk to Wendy.