Getting Started with WorkFlows Item Categories 4 & 5

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Before beginning to use item cats 4 and 5:

Be sure to talk with colleagues at your library to decide which item cat 4 and 5 codes you will assign to your collection before you begin using the codes. Please see the next section for tips for selecting item cat 4 and 5 codes.

The item cat 4 list is posted at http://alsrsa.org/client/search/asset/3862. Item cat 4 indicates the item's genre and is strongly recommended for new items cataloged.

The item cat 5 list is posted at http://alsrsa.org/client/search/asset/3863. Item cat 5 indicates the item's sub-genre and is optional.

You may need additional item cat 4 and 5 codes to describe your collection. If you have suggestions for codes, please share them with Erica at the RSA Help Desk: rsahelp@railslibraries.info or 1-866-940-4083. If RSA approves your suggestion, the code will be added to the item cat 4 or 5 list posted at the links above and entered into WorkFlows so it will appear in the appropriate item cat menu.

After you and your colleagues decide which item cat 4 and 5 codes to use, prepare a list of the item cat 4 and 5 codes to help guide cataloging staff and ensure consistency in how the codes are assigned to your collection.

Tips for selecting item cats 4 and 5:

Below are several tips for selecting item cat 4 and 5 codes. Please use the codes you feel will work best for your collection. RSA staff cannot advise on "right" or "wrong" item category codes to use. If your library does not plan to use item categories 4 or 5, please assign UNDEFINED for each code.

- Do any of your call numbers begin with prefixes that indicate a genre, such as B for biographies, M for mysteries, W for Westerns, etc.?
- Do you shelve certain genres or subjects separately in your collection (romance, science fiction, easy readers, etc.)? Do you use home location codes to help your patrons find where those items are shelved?
- Did your library use item cat 1 codes that now appear in the item cat 4 menu, the item cat 5 menu, or both menus? For example, the former N_BIOG cat 1 code is now the BIOGRAPHY cat 4 code. Please contact Wendy at the RSA Help Desk (rsahelp@railslibraries.info) for a report of item cat 1 codes used by your library.
- Which genres or subjects does your library focus on in its collection development? What do your patrons like to read and are likely to search for in the RSAcat?
- Do you use spine labels on your items to help patrons identify different genres or subjects when they browse your collection (historical fiction, fantasy, mystery, etc.)?
- Does the bibliographic record have any 650 and 655 fields? These fields can provide clues about the item's subject (in the 650 fields) and genre (in the 655 fields).

Customizing item cat 4 and 5 menus in WorkFlows:
As of April 1, 2014, RSA began accepting requests to customize item category 4 or 5 menus. Customizing your library's item cat 4 and 5 menus is optional, but strongly recommended to ensure you are assigning the correct codes to your collection. If your library would like to customize its item cat 4 or 5 menus, please send a message with the codes to include in your menus to Amanda at the RSA Help Desk: rsahelp@railslibraries.info.

Setting default codes for item cats 4 and 5 in WorkFlows:
Once your library decides which item cat 4 and 5 codes it will assign to its collection, please be sure to set default properties for item categories 3, 4, and 5 in WorkFlows cataloging wizards. This way, when you catalog new items, default codes other than UNDEFINED will be assigned for item cats 3, 4, and 5. For instructions how to set properties in WorkFlows cataloging wizards, please see the cataloging module set-up guide at http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/721.

Entering item category 3, 4, and 5 codes into your 949 tags in OCLC Connexion:
RSA recommends editing your existing bibliographic constant data (949 tag templates) in OCLC Connexion, if your library uses Connexion to find bibliographic records in OCLC for those items that do not already having matching records in WorkFlows.

By editing your constant data templates in OCLC Connexion, codes for item categories 3, 4, and 5 will automatically populate in the WorkFlows item cat menus when you load an OCLC record with item cat codes correctly entered in the 949 tag. If you edit your constant data templates to include codes for item cats 3, 4, and 5, there will be no need for you to use the Call Number and Item Maintenance wizard to assign the item cat codes in WorkFlows after you load OCLC records.

If your library uses OCLC Connexion Client, the program installed on your computer with a desktop icon, instructions how to edit your 949 tag templates to include codes for item cats 3, 4, and 5 are posted at http://alsrsa.org/client/search/asset/3943.

If your library uses OCLC Connexion Browser, accessed online at http://connexion.oclc.org/corc.html, instructions how to edit your 949 tag templates to include item cats 3, 4, and 5 are posted at http://alsrsa.org/client/search/asset/3942.

Editing existing items in your collection to use item cats 4 and 5:
At this time RSA staff is not accepting requests to batch edit existing items in your collection to use item cats 4 and 5. Basic and Full Online RSA members are encouraged to complete WorkFlows item group editor training. Item group editor workshops offered at the RAILS East Peoria service center are posted on the L2 calendar at http://www.librarylearning.info/?LibSys=RSA. Please note no workshops are scheduled May through August.

Erica is available to visit libraries to provide item group editor training. Please contact her at erica.laughlin@railslibraries.info to schedule onsite item group editor training.

For libraries that have completed WorkFlows item group editor training, you may batch change up to 5,000 items per day in your collection. Please note this limit applies per library – not per staff member at your library who uses the item group editor. It is very important you carefully track the number of items

you edit in the item group editor. RSA staff cannot track edits for you. Exceeding the 5,000 item per day modification limit may cause indexing trouble overnight and WorkFlows issues the following day. If your library would like to schedule a day to modify more than 5,000 items in a single day, please first check with James at james.campbell@railslibraries.info or 1-866-940-4083 to ensure other projects will not interfere with your edits.

Searching by item cats 3, 4, and 5 in the Traditional RSAcat:

The new item cat 3, 4, and 5 codes will be implemented in the Traditional RSAcat during the WorkFlows upgrade on May 22, 2014. After that upgrade is complete, menus for item cats 3, 4, and 5 will appear on the advanced search page and at the bottom of each hit list results page in the Traditional RSAcat.

The new code menus that will appear after the upgrade are circled in red below. Item cat 4 is represented by the genre menu, and item cat 5 corresponds to the sub-genre menu. The format menu is now based strictly on the item type and its corresponding item cat 3 code. The general item format menu you currently see on the advanced search screen in the RSAcat will be removed during the system upgrade on May 22nd.

Display of item cats 3, 4, and 5 in the RSA Discovery Search Catalog:

The new item cat 3, 4, and 5 codes display as facets on the left-hand side of the results page after you perform a search in the RSA Discovery Catalog. Terms under each facet can be check marked in their corresponding boxes and then either included or excluded to further narrow the search results.

The new facets are circled in red below. Item cat 4 is represented by the genre facet, and item cat 5 corresponds to the sub-genre facet. The format facet is now based strictly on the item type and its corresponding item cat 3 code.