Guide for Cataloging On-Order Items

Revised October 11, 2022

This guide is available here: https://rb.gy/eqrikf

Questions?
Please contact the RSA Help Desk:
help@rsanfp.org
1-866-940-4083

Please use **on-order procedure A, starting on page 2** of this document, if your library assigns new item types for at least one of these scenarios:

- Scenario #1: An item is assigned a new item type when it is on-order, and the physical item has not yet arrived at the library to be cataloged.
                                         --OR--
- Scenario #2: An on-order item is assigned a new item type once the physical item arrives at the library, and it is fully cataloged.

New item types include:

Item Type Code:	Use For:
N-BK	Book New - No Holds or Local Holds
N-BK-H	Book New - System-wide Holds
N-BK-ON-CD	Book on CD New - and holds rule
N-BLRAY	Blu-ray HD Video Disk New - No Holds or Local Holds
N-BLRAY-H	Blu-ray HD Video Disk New - System-wide Holds
N-BLRAY-J	Juvenile Blu-ray HD Video Disk New - any holds rule
N-CD	Music CD New - any holds rule
N-DVD	DVD New - No Holds or Local Holds
N-DVD-H	DVD New - System-wide Holds
N-DVD-J	Juvenile DVD New - any holds rule
N-PLAYAWAY	Playaway New - any holds rule
N-VIDEOGM	Videogame New - any holds rule

If your library does not assign any of these new item types in either of the scenarios described above, please use **on-order procedure B, starting on page 10** of this document.

Procedure A:
Follow this procedure if your library
uses new item types for on-order items.

Before you begin

Decide if your library wants to allow patrons to place holds on the on-order items but prevent the on-order items from appearing on your pick list until the items have physically arrived at your library.

If you want to do this, use the User Registration wizard to create an on-order user for your library. Be sure you assign the user profile of LIB-USE. This profile has no expiration date and an unlimited checkout period with no fines. Patrons will be able to place holds on the on-order item, but WorkFlows will not place it on your pick list because the item is already checked out to your library's on-order user.

If LIB-USE does not appear in your library's profile menu, please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

Please do not assign the LIBRARYUSE profile to your on-order user even if this profile appears in your library's menu. LIBRARYUSE is configured to recirculate, which means the on-order item will be able to be checked out to both the on-order and discard users at the same time. The double checkout will prevent discard of the on-order item and cause confusion with holds.

To create a brief record for an on-order item

1. Log into WorkFlows using your individual cataloger account. If you have not yet been assigned an individual cataloger account, login using your library's TECH account.

2. Click on the Cataloging module at the top of the screen.

3. Use the Call Number and Item Maintenance wizard to search for an OCLC or brief record for your item.

   Important:
   - If you find a matching record, either OCLC or brief, already in WorkFlows, attach your on-order item to the record. Please do not create a new brief record.
   - If more than one brief record is created, only one of the records will be replaced (or "overlaid") when the OCLC record is imported into WorkFlows. If your brief record is not overlaid, your holds will not transfer to the OCLC record.

- If there is no matching OCLC or brief record for your item in WorkFlows, continue to step 4 below.
- If you are using an OCLC record in WorkFlows, continue to step 7 below.

4. From the Titles group on the left side of the screen, open the Add Title wizard.

5. On the Bibliographic tab, fill in the following information under "Contents":
   a. ISBN (020): Enter the 13-digit ISBN if the item has more than one ISBN. If the item only has a 10-digit ISBN, enter it. Do not use hyphens or spaces.
      Examples:

      | ISBN | 020 | 9780355398754 |
      | ISBN | 020 | 9791027601387 |
      | ISBN | 020 | 1338784854 |

   b. ISSN (022): Enter the 8-digit ISSN if the item has one. Use a hyphen between the fourth and fifth digits.
      Examples:

      | ISSN | 022 | 0032-4558 |
      | ISSN | 022 | 0272-961X |

   c. UPC (024): Enter the 12-digit UPC if the item has one. Do not use hyphens or spaces.
      Examples:

      | Standard identifier# | 024 | 826150208925 |
      | Standard identifier# | 024 | 191329208410 |

   d. Author (100): Enter the author's name in ALL CAPS in the LASTNAME, FIRSTNAME format.
      Examples:

      | Personal Author | 100 | 1 | DICKENS, CHARLES |
      | Personal Author | 100 | 1 | LE GUEN, SANDRA |

   e. Title (245): ***Required*** for all brief records. Backspace the auto-generated **Required Field** text. Type the title in ALL CAPS. Include initial articles (such as a, an, the), as well as first and second indicators, to ensure the record is fully searchable in the RSAcat.

      - Example for a title that begins with "The" and *has* an author:

        | Title | 245 | 14 | THE HELP |

      - Example for a title that begins with "The" and does *not* have an author:

Title 245   04   THE HELP

- Example for a title that begins with "A" and *has* an author:

  Title 245   12   A DANCE WITH DRAGONS

- Example for a title that begins with "A" and does *not* have an author:

  Title 245   02   A DANCE WITH DRAGONS

- Example for a title that begins with "An" and *has* an author:

  Title 245   13   AN APPLE A DAY

- Example for a title that begins with "An" and does *not* have an author:

  Title 245   03   AN APPLE A DAY

- Example for a title that does not begin with "A," "An," or "The" and *has* an author:

  Title 245   10   LEAVE NO SCONE UNTURNED

- Example for a title that does not begin with "A," "An," or "The" and does *not* have an author:

  Title 245   00   LEAVE NO SCONE UNTURNED

f. General Note (500): This field is optional. Use it to enter information about the on-order item that is helpful for the patron to know when they are considering placing a hold. Information may include (but is not limited to) large print, abridged versus unabridged, DVD versus Blu-ray, wide screen versus full screen, playing or listening time, or a movie rating. No need to enter the general note in ALL CAPS.

g. Cataloger Email (592): **_Required_** for all brief records. Backspace the auto-generated **Required Field** text. Type your preferred email address in this field. No need to enter the email address in ALL CAPS. If RSA has a question about your on-order record, we will know the best way to contact you based on what you enter in the 592 field.

h. Held by (596): Leave this field blank. Your library's WorkFlows code will automatically be entered into this field as the record is indexed.

6. On the Control tab, edit the title control number.
   a. If the item has an ISBN, enter a lower case i followed by the ISBN. Use the 13 digit ISBN if the item has more than one ISBN. If the item only has a 10-digit ISBN, enter a lower case i followed by that ISBN. Do not use hyphens or spaces.
      Examples:

      | Title control number: | i9780355398754 |
      | Title control number: | i9791027601387 |
      | Title control number: | i1338784854 |

   b. If the item has an ISSN, enter a lower case s followed by the ISSN, including its hyphen.
      Examples:

      | Title control number: | s0032-4558 |
      | Title control number: | s0272-961X |

   c. If the item has a UPC, enter an upper case U followed by the UPC. Do not use hyphens or spaces.
      Examples:

      | Title control number: | U826150208925 |
      | Title control number: | U191329208410 |

   d. If the item does not have an ISBN, ISSN, or UPC, leave the SirsiDynix auto-generated title control number that begins with an 'a' (e.g., a16578) as-is in the title control number field.
      Example:

      | Title control number: | a2251125 |

7. On the Call Number/Item tab, enter this information:
   a. Call number: type in ON ORDER
   b. Call library: your WorkFlows library code (should appear by default)
   c. Item ID: Type in a **placeholder item ID** using your library's preferred naming convention or the following convention recommended by RSA:
      i. Cataloger's first and last initials, followed by
      ii. First three letters of the title (excluding the initial articles a, an, the) and
      iii. The date cataloged in the MMDDYYYY format.
      Example:

Item ID: ELWOR08232022

Please do not use the actual item ID, beginning with A or 3344, when you enter the on-order item. Using the actual item ID when the on-order is cataloged may cause RSA to batch edit the item to a standard, non-new item type (e.g., BOOK) sooner than necessary, when the owning library still considers the item new.

When the actual on-order item arrives at the library, it will be cataloged separately, as a new item with an actual item ID. The on-order item will then be discarded. The date for the newly cataloged item will be used to determine when it ages past 13 months. At that point, the new item will be batch edited by RSA to a standard, non-new item type (e.g., BOOK) if the owning library has not already edited it.

d. Type: select ON-ORDER or the applicable new item type from the drop down list.
e. Item Library: your WorkFlows library code (should appear by default)
f. Home Location: select ON-ORDER or another suitable location from the drop down list
g. Item cat 1: Select FICTION or NONFICTION. Item cat 1 cannot be blank or UNDEFINED.
h. Item cat 2: Select the reading level for the item. Item cat 2 cannot be blank or UNDEFINED.
i. Item cat 3: Select BOOK even if the on-order item is a DVD, Blu-ray, audiobook or other non-book format. The BOOK item cat 3 corresponds to the ON-ORDER item type. Item cat 3 cannot be blank or UNDEFINED.
j. Item cat 4: UNDEFINED
k. Item cat 5: UNDEFINED
l. Number of pieces: 1
m. Price: $0.00
n. *Optional:* In the extended information, enter notes about the on-order item.
    i. Examples include the first and last initials of the library staff member's name who cataloged it or the book's anticipated general release date.
    ii. RSA recommends using STAFF for most notes, so they are invisible to patrons in the RSAcat but still visible to staff in WorkFlows.

8. Click the Save button at the bottom of the screen.

Important:
- Always use the close button at the bottom of the screen to shut the brief record.

- After a brief record is saved, and the brief record screen is closed, you are unable to edit the brief record's ISBN, ISSN, UPC, author, title, general note, cataloger email address, or title control number. Please report mistakes on brief records to help@rsanfp.org.

If your library has set up an on-order user to prevent on-order items with holds from appearing on your library's pick list

1. Go to the Circulation module.
2. Open the CheckOut wizard.
3. In the User ID box, scan or type in the barcode you assigned to your on-order user.
   <div align="center">--OR--</div>
   Go to the upper left corner of the Checkout wizard. Use the first helper button—the User Search—to search for your on-order user. Click the "Checkout To User" button.
4. Type in the on-order item's **placeholder item ID** into the Item ID box.
5. Click the "Check Out Item To User" button at the bottom of the screen.

The on-order item is now checked out to the on-order user. Patrons will be able to place holds on the item, but it will not appear on your pick list because WorkFlows thinks the item is already checked out—i.e., unavailable to fill the hold.

Once the on-order item arrives at the library and is ready to be fully cataloged as permanent to the collection

1. Go to the Cataloging module.
2. Use the Call Number and Item Maintenance wizard to search for your on-order item.
3. Once the record is retrieved with your on-order item attached to it, go to the Call Number/Item tab within the Call Number and Item Maintenance wizard.
4. Click the "Add Call Number" button at the bottom of the screen.
5. Catalog the item as brand new, permanent to your collection (i.e., not assigned on-order information). Assign an **actual item ID** beginning with A or 3344. Click save.
6. Go to the next section for what to do with your on-order item still attached to the record.

If your library checked out the on-order item to an on-order user

1. Go to the Circulation module.
2. Open the Discharge (Checkin) wizard.
3. In the User ID box, scan or type in the barcode you assigned to your library's discard user.
   --OR--
   Go to the upper left corner of the Checkout wizard. Use the first helper button—the User Search—to search for your discard user. Click the "Checkout To User" button.
4. In the Item ID field on the CheckOut screen, type in the **placeholder item ID** that you assigned to the on-order item. Click the "Check Out Item To User" button at the bottom of the screen.
5. You will see a pop-up box that says, "Item was not discharged, override to clear charge." Enter the override of RSA and click "Override & Checkout Item."
6. You may see another pop-up box that says, "Item has holds." Enter RSA as the override, then click "Override & Checkout Item." **Please do not click "Override Checkout Item & Cancel Hold" to avoid removing the hold from the record.**
7. You may see another pop-up box that says, "Item in transit – cannot charge." Enter RSA as the override, then click "Release Item."

The on-order item is now checked out to your library's discard user, shadowed in the RSAcat, and will be automatically removed by the WorkFlows discard process once all the holds on the record have been filled. The hold that was placed on the on-order item has not been cancelled but will be filled by another item attached to the same record.

If your library did not check out the on-order item to an on-order user

Check out the on-order item to your library's discard user by doing the following:
1. Go to the CheckOut wizard.
2. In the User ID box, scan or type in the barcode you assigned to your library's discard user.
   --OR--
   Go to the upper left corner of the Checkout wizard. Use the first helper button—the User Search—to search for your discard user. Click the "Checkout To User" button.
3. In the Item ID field on the CheckOut screen, type in the **placeholder item ID** you assigned to the on-order item.
4. Click the "Check Out Item To User" button at the bottom of the screen.
5. You may see a pop-up box that says, "Item has holds." Enter RSA as the override, then click "Override & Checkout Item." **Please do not click "Override Checkout Item & Cancel Hold" to avoid removing the hold from the record.**

6. You may see another pop-up box that says, "Item in transit – cannot charge."
    Enter RSA as the override, then click "Release Item."

The on-order item is now checked out to your library's discard user, shadowed in the
RSAcat, and will be automatically removed by the WorkFlows discard process once all
the holds on the record have been filled. The hold that was placed on the on-order item
has not been cancelled but will be filled by another item attached to the same record.

Procedure B:
Follow this procedure if your library
does not use new item types for on-order items.

Before you begin

Decide if your library wants to allow patrons to place holds on the on-order items but prevent the on-order items from appearing on your pick list until the items have physically arrived at your library.

If you want to do this, use the User Registration wizard to create an on-order user for your library. Be sure you assign the user profile of LIB-USE. This profile has no expiration date and an unlimited checkout period with no fines. Patrons will be able to place holds on the on-order item, but WorkFlows will not place it on your pick list because the item is already checked out to your library's on-order user.

If LIB-USE does not appear in your library's profile menu, please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

Please do not assign the LIBRARYUSE profile to your on-order user even if this profile appears in your library's menu. LIBRARYUSE is configured to recirculate, which means the on-order item will be able to be checked out to both the on-order and discard users at the same time. The double checkout will prevent discard of the on-order item and cause confusion with holds.

To create a brief record for an on-order item

1. Log into WorkFlows using your individual cataloger account. If you have not yet been assigned an individual cataloger account, login using your library's TECH account.

2. Click on the Cataloging module at the top of the screen.

3. Use the Call Number and Item Maintenance wizard to search for an OCLC or brief record for your item.

   Important:
   - If you find a matching record, either OCLC or brief, already in WorkFlows, attach your on-order item to the record. Please do not create a new brief record.
   - If more than one brief record is created, only one of the records will be replaced (or "overlaid") when the OCLC record is imported into WorkFlows. If your brief record is not overlaid, your holds will not transfer to the OCLC record.

- If there is no matching OCLC or brief record for your item in WorkFlows, continue to step 4 below.
- If you are using an OCLC record in WorkFlows, continue to step 7 below.

4. From the Titles group on the left side of the screen, open the Add Title wizard.

5. On the Bibliographic tab, fill in the following information under "Contents":

a. ISBN (020): Enter the 13-digit ISBN if the item has more than one ISBN. If the item only has a 10-digit ISBN, enter it. Do not use hyphens or spaces.

  Examples:

ISBN	020	9780355398754
ISBN	020	9791027601387
ISBN	020	1338784854

b. ISSN (022): Enter the 8-digit ISSN if the item has one. Use a hyphen between the fourth and fifth digits.

  Examples:

  | ISSN | 022 | 0032-4558 |
  | ISSN | 022 | 0272-961X |

c. UPC (024): Enter the 12-digit UPC if the item has one. Do not use hyphens or spaces.

  Examples:

  | Standard identifier# | 024 | 826150208925 |
  | Standard identifier# | 024 | 191329208410 |

d. Author (100): Enter the author's name in ALL CAPS in the LASTNAME, FIRSTNAME format.

  Examples:

  | Personal Author | 100 | 1 | DICKENS, CHARLES |
  | Personal Author | 100 | 1 | LE GUEN, SANDRA |

e. Title (245): **_Required_** for all brief records. Backspace the auto-generated **Required Field** text. Type the title in ALL CAPS. Include initial articles (such as a, an, the), as well as first and second indicators, to ensure the record is fully searchable in the RSAcat.

   - Example for a title that begins with "The" and _has_ an author:

     | Title | 245 | 14 | THE HELP |

   - Example for a title that begins with "The" and does _not_ have an author:

Title 245 04 THE HELP

- Example for a title that begins with "A" and *has* an author:

  Title 245 12 A DANCE WITH DRAGONS

- Example for a title that begins with "A" and does *not* have an author:

  Title 245 02 A DANCE WITH DRAGONS

- Example for a title that begins with "An" and *has* an author:

  Title 245 13 AN APPLE A DAY

- Example for a title that begins with "An" and does *not* have an author:

  Title 245 03 AN APPLE A DAY

- Example for a title that does not begin with "A," "An," or "The" and *has* an author:

  Title 245 10 LEAVE NO SCONE UNTURNED

- Example for a title that does not begin with "A," "An," or "The" and does *not* have an author:

  Title 245 00 LEAVE NO SCONE UNTURNED

f. General Note (500): This field is optional. Use it to enter information about the on-order item that is helpful for the patron to know when they are considering placing a hold. Information may include (but is not limited to) large print, abridged versus unabridged, DVD versus Blu-ray, wide screen versus full screen, playing or listening time, or a movie rating. No need to enter the general note in ALL CAPS.

g. Cataloger Email (592): ***Required*** for all brief records. Backspace the auto-generated **Required Field** text. Type your preferred email address in this field. No need to enter the email address in ALL CAPS. If RSA has a question about your on-order record, we will know the best way to contact you based on what you enter in the 592 field.

h. Held by (596): Leave this field blank. Your library's WorkFlows code will automatically be entered into this field as the record is indexed.

6. On the Control tab, edit the title control number.
    a. If the item has an ISBN, enter a lower case i followed by the ISBN. Use the 13 digit ISBN if the item has more than one ISBN. If the item only has a 10-digit ISBN, enter a lower case i followed by that ISBN. Do not use hyphens or spaces.
        Examples:

Title control number:	i9780355398754
Title control number:	i9791027601387
Title control number:	i1338784854

    b. If the item has an ISSN, enter a lower case s followed by the ISSN, including its hyphen.
        Examples:

Title control number:	s0032-4558
Title control number:	s0272-961X

    c. If the item has a UPC, enter an upper case U followed by the UPC. Do not use hyphens or spaces.
        Examples:

Title control number:	U826150208925
Title control number:	U191329208410

    d. If the item does not have an ISBN, ISSN, or UPC, leave the SirsiDynix auto-generated title control number that begins with an 'a' (e.g., a16578) as-is in the title control number field.
        Example:

Title control number:	a2251125

7. On the Call Number/Item tab, enter this information:
    a. Call number: type in ON ORDER
    b. Call library: your WorkFlows library code (should appear by default)
    c. Item ID: Scan or type in the item barcode beginning with A or 3344 (the latter for Quincy Public Library)
    d. Type: select ON-ORDER or the applicable item type from the drop down list.
    e. Item Library: your WorkFlows library code (should appear by default)
    f. Home Location: select ON-ORDER or another suitable location from the drop down list

g. Item cat 1: Select FICTION or NONFICTION. Item cat 1 cannot be blank or UNDEFINED.
h. Item cat 2: Select the reading level for the item. Item cat 2 cannot be blank or UNDEFINED.
i. Item cat 3: Select BOOK even if the on-order item is a DVD, Blu-ray, audiobook or other non-book format. The BOOK item cat 3 corresponds to the ON-ORDER item type. Item cat 3 cannot be blank or UNDEFINED.
j. Item cat 4: UNDEFINED
k. Item cat 5: UNDEFINED
l. Number of pieces: 1
m. Price: $0.00
n. *Optional:* In the extended information, enter notes about the on-order item.
    i. Examples include the first and last initials of the library staff member's name who cataloged it or the book's anticipated general release date.
    ii. RSA recommends using STAFF for most notes, so they are invisible to patrons in the RSAcat but still visible to staff in WorkFlows.

8. Click the Save button at the bottom of the screen.

    Important:
    • Always use the close button at the bottom of the screen to shut the brief record.
    • After a brief record is saved, and the brief record screen is closed, you are unable to edit the brief record's ISBN, ISSN, UPC, author, title, general note, cataloger email address, or title control number. Please report mistakes on brief records to help@rsanfp.org.

If your library has set up an on-order user to prevent on-order items with holds from appearing on your library's pick list

1. Go to the Circulation module.
2. Open the CheckOut wizard.
3. In the User ID box, scan or type in the barcode you assigned to your on-order user.
                              --OR--
    Go to the upper left corner of the Checkout wizard. Use the first helper button—the User Search—to search for your on-order user. Click the "Checkout To User" button.
4. Scan or type in the on-order item's barcode into the Item ID box.
5. Click the "Check Out Item To User" button at the bottom of the screen.

The on-order item is now checked out to the on-order user. Patrons will be able to place holds on the item, but it will not appear on your pick list because WorkFlows thinks the item is already checked out—i.e., unavailable to fill the hold.

Once the on-order item arrives at the library and is ready to be fully cataloged as permanent to the collection

1. Go to the Cataloging module.
2. Use the Call Number and Item Maintenance wizard to search for your on-order item.
3. Once the record is retrieved with your on-order item attached to it, go to the Call Number/Item tab within the Call Number and Item Maintenance wizard.
4. Edit the on-order item to reflect it is now permanent to your collection (i.e., not assigned on-order information). Leave the same item ID assigned to the item.
5. Click Save.
6. Discharge the item using the Discharge (Checkin) wizard in the Circulation module.

The item is no longer checked out to the on-order user. WorkFlows will begin filling the holds that patrons have placed while the item was checked out to the on-order user.