

WorkFlows Format Search Enhancement

Created December 14, 2020

To make format searching easier in WorkFlows, each RSA library now has access to all codes in the WorkFlows item category 3 drop-down menu.

Item category 3 indicates the item's general format and is helpful for searching in both WorkFlows and the RSAcat.

Here are the codes now accessible in your library's item category 3 menu:

AUDIOBOOK
BOOK
BRAILLE
EBOOK-ERES
EQUIPMENT
GOV-DOC
KIT
LARGEPRINT
MAP
MICROFORM
MOVIE
MUSIC
PAMPHLET
PERIODICAL
REALIA
SOFTWARE
TEXTBOOK
TOY
UNDEFINED
UNKNOWN
VIDEOGAME

Even though RSA advises against using UNDEFINED and UNKNOWN because they do little to indicate the item's format, those codes must stay in the menu because they are required in our WorkFlows configuration. The document "Mandatory Codes for RSA Libraries," available here: <https://alsi.sdp.sirsi.net/client/search/asset/3922>, has been revised to reflect all codes, including UNDEFINED and UNKNOWN, are now included in the item category 3 menu.

Why did RSA make the format search enhancement?

Now that RSA made this enhancement, you will be able to search for items of any format in WorkFlows, assigned any item category 3 code, whether or not your library has that format in its own collection.

The format search enhancement applies to these WorkFlows wizards:

- Call Number and Item Maintenance in the Cataloging module
- Item Search and Display both in the Cataloging and Circulation modules
- Add Item in the Cataloging module
- Edit Item in the Cataloging module

Before this enhancement, only those codes applicable to your library's collection were in the item category 3 menu. A customized item category 3 menu was helpful for catalogers because only those codes applicable to their collections were in the menu. The customized item category 3 menu reduced the likelihood of the cataloger selecting the incorrect code as they entered an item into WorkFlows. Even if a cataloger accidentally selects the incorrect code, an automated RSA process that runs daily will assign that item the correct item category 3 based on these [item type/item category 3 mappings](#).

The customized item category 3 menu, however, made searching by format difficult when using the WorkFlows "Search Options" helper in wizards like Call Number and Item Maintenance or Item Search and Display. If a library, for example, did not own audiobooks in its collection, but it wanted to search for a title in the audiobook format to place on hold for a patron, that library may have done a search with the word "audio" in the general field and the title entered in the title field, like this:

Call Number and Item Maintenance *
 Call Number and Item Maintenance

Author: AND Title: AND Search
 Series: AND Subject: AND Reset
 General: AND Periodical Title:
 Library:

Current:
 ADVANCED SEARCH KEYWORD Title LINCOLN LAWYER, AND General AUDIO, ALL: 5 records

Title	Author	Carrier Type	Pub. Year	Library Copies
The Lincoln lawyer		videodisc	2011	7
The Lincoln lawyer [videorec...]			2011	2
The Lincoln lawyer		videodisc	2011	48
The Lincoln lawyer [electroni...]	Connelly, Michael, 1956-		2007	2
The Lincoln lawyer	Connelly, Michael, 1956- aut...	audio disc	2005	6

Notice in the example above only two audiobook results are returned, published in 2005 and 2007.

If you search by that same title using the recent enhancement, combining the title with the AUDIOBOOK item category 3 in the "Search Options" helper, notice five audiobook results are returned. The 2005 and 2007 publications are still included in the results, but three additional audiobooks are also listed:

Call Number and Item Maintenance *
 Call Number and Item Maintenance

Author: AND Title: lincoln lawyer AND Search

Series: AND Subject: AND Reset

General: AND Periodical Title:

Library: ALL

Current:

ADVANCED SEARCH KEYWORD Title LINCOLN LAWYER, ALL: 5 records

Title	Author	Carrier Type	Pub. Year	Library Copies
The Lincoln lawyer [electroni...	Connelly, Michael, 1956-		2007	2
Lincoln tales tall and true [so...	Ellis, Brian, 1962-		2006	2
The Lincoln lawyer [sound r...	Connelly, Michael, 1956-		2005	10
The Lincoln lawyer [sound r...	Connelly, Michael, 1956-		2005	1
The Lincoln lawyer	Connelly, Michael, 1956- aut...	audio disc	2005	6

RSA recommends using the recent enhancement when searching by format to avoid incomplete results. Missing results will give you an inaccurate understanding of the item's availability and could affect the patron's ability to check out or place a hold on the item.

How do you take advantage of the format search enhancement?

1. Log into WorkFlows using your individual cataloger, TECH (if your library still uses it), or CIRC account.
2. Open a wizard to search for an item, whether Call Number and Item Maintenance, Item Search and Display, Add Item, or Edit Item.
3. In the upper left corner of the wizard, click the "Search Options" helper button that resembles a pair of black binoculars with a red pick axe:

Call Number and Item Maintenance *
 Call Number and Item Maintenance

Author: AND Title: AND Search

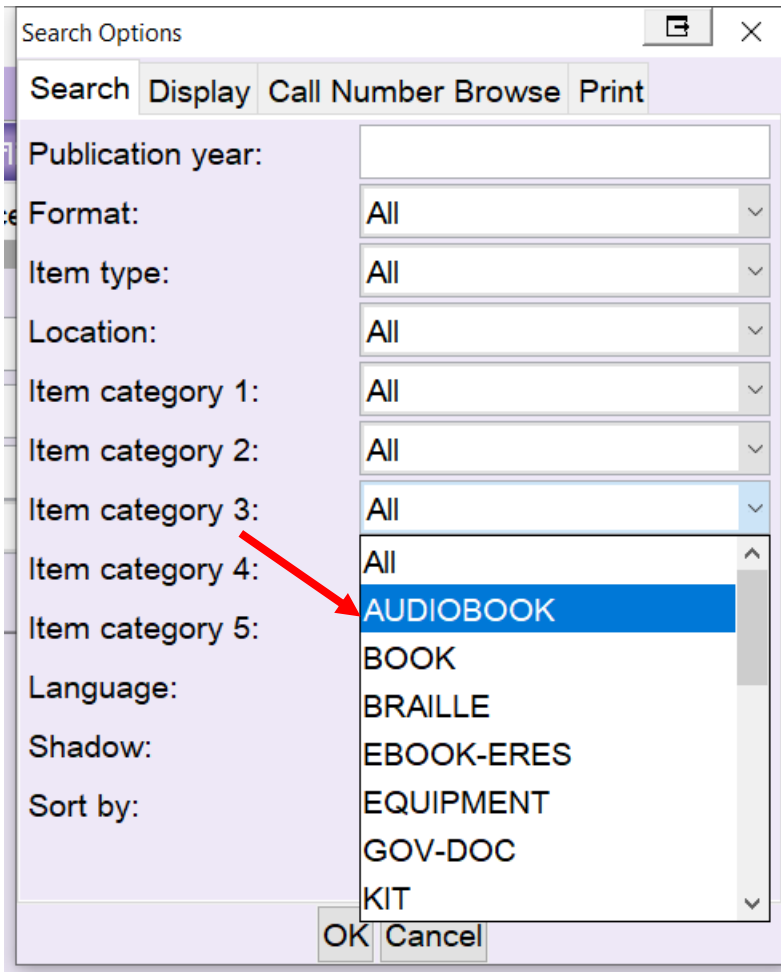
Series: AND Subject: AND Reset

General: AND Periodical Title:

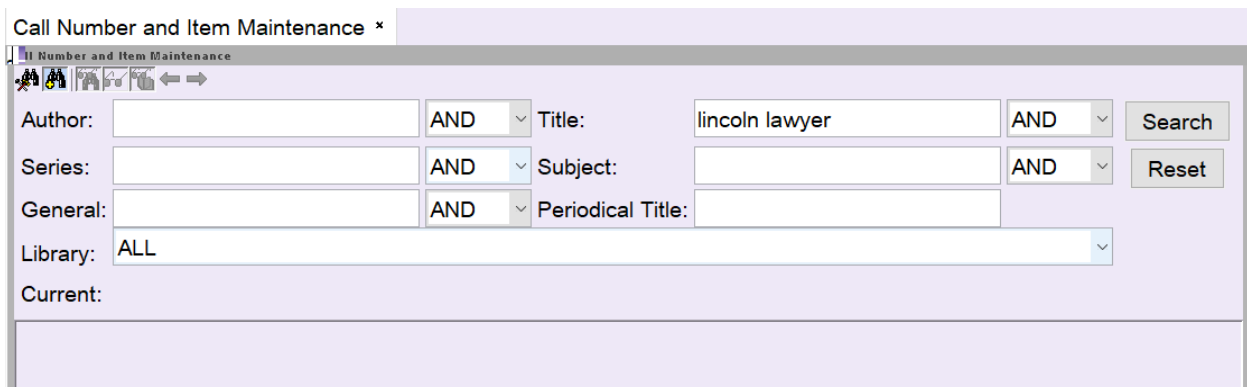
Library: ALL

Current:

4. From the "Search Options" popup box, use the item category 3 menu to select the format code by which you want to search. Let's use the Lincoln Lawyer example from earlier in this document and select AUDIOBOOK.



5. Click OK to close the “Search Options” box.
6. Enter Lincoln Lawyer into the title field. Click <Search> or hit <Enter> on your keyboard.



7. All of the results returned have items cataloged on them that are assigned the AUDIOBOOK item category 3. Here is an example from the search shown above:

Call Number and Item Maintenance *
 Call Number and Item Maintenance

Author: AND Title: lincoln lawyer AND Search
 Series: AND Subject: AND Reset
 General: AND Periodical Title:
 Library: ALL

Current:
 ADVANCED SEARCH KEYWORD Title LINCOLN LAWYER, ALL: 5 records

Title	Author	Carrier Type	Pub. Year	Library Copies
The Lincoln lawyer [electroni...	Connelly, Michael, 1956-		2007	2
Lincoln tales tall and true [so...	Ellis, Brian, 1962-		2006	2
The Lincoln lawyer [sound r...	Connelly, Michael, 1956-		2005	10
The Lincoln lawyer [sound r...	Connelly, Michael, 1956-		2005	1
The Lincoln lawyer	Connelly, Michael, 1956- aut...	audio disc	2005	6

Description Call Number/Item

<ul style="list-style-type: none"> The Lincoln lawyer [electronic resource] - Connelly, Michael, 1956- <ul style="list-style-type: none"> EUREKA-PLD <ul style="list-style-type: none"> PLAY 206 CON - EUREKA-PLD <ul style="list-style-type: none"> A66201044223 - 1 - PLAYAWAY - PLAYAWAY LILLIE-M-E 	Price: \$0.00 Home location: PLAYAWAY Item category 1: FICTION Item category 3: AUDIOBOOK Item category 5: UNDEFINED Date created: 5/27/2014 Date last charged: 4/23/2019 Last discharged: 4/23/2019, 11:06 Date inventoried: Never	Item type Current I Item cate Item cate Previous User ID: Last acti Total che In-house
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Modifv Close

- When you are finished searching by format, please completely shut the wizard using the <Close> button at the bottom of the screen. This step is very important so that when you enter your next search into that wizard, the format search option you selected for the previous search is cleared.

For more information about using the "Search Options" helper, please see pages 2-4 of this guide: <http://alsrsa.org/client/search/asset/4427>. Even though this guide is written for the Call Number and Item Maintenance wizard, the same search strategies apply to the Item Search and Display, Add Item, and Edit Item wizards.

Questions about the format search enhancement?

Please contact the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083.