

WorkFlows Item Categories 3, 4, and 5 FAQs for RSA Libraries

Revised September 10, 2013
This hand-out is also available at
<http://alsrsa.org/client/search/asset/3502>

Why does WorkFlows have item categories 3, 4, and 5?

Item cats 3, 4, and 5 will help you track additional statistics for your collection and shorten the existing options for item categories 1 and 2. Item cats 3, 4, and 5 will be available as search facets in the item group editor wizard and in the RSA Discovery Search Catalog at <http://alsi.sdp.sirsi.net/client/RSA>.

When did WorkFlows get item categories 3, 4, and 5?

These item cats are new features from the WorkFlows upgrade RSA completed on June 11, 2013. Item cats 3, 4, and 5 are only visible in the most recent version of WorkFlows – version number 3.4.1.3.1183. To ensure you are running the latest version of WorkFlows, see the cheat sheet posted at <http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/2721>.

Where can I see item categories 3, 4, and 5 in WorkFlows?

The new item cats are visible in these WorkFlows cataloging wizards: Call Number and Item Maintenance, Item Search and Display, Add Title, and Add Item.

Drop-down menus for item categories 3, 4, and 5 are not yet available in the Add Brief Title wizard or the Checkout wizard's Add Brief Title helper in the WorkFlows circulation module. The addition of item cat 3, 4, and 5 menus to the circulation module are planned for a future WorkFlows update.

Are code lists for item cats 3, 4, and 5 available?

Proposed code lists for item cats 1-5 are posted at <http://alsi.sdp.sirsi.net/client/search/asset/3662>. RSA will reconfigure the codes currently available in the item cat 1-2 menus, and new codes will be available in the item cat 3-5 menus. This spreadsheet has separate tabs at the bottom for the proposed item cat 1-5 code lists. It also has a tab for the existing item cat 1 codes that should no longer be used and will be suppressed for all RSA libraries. *Please note this spreadsheet is only a draft. Your suggestions are welcome!*

What codes am I supposed to use for item categories 3, 4, and 5 when I catalog?

Please use UNDEFINED for item cats 3, 4, and 5 until further notice. Any new items you create in WorkFlows will be automatically assigned the UNDEFINED value for item cats 3, 4, and 5. If you import OCLC records into WorkFlows, the items attached to the OCLC records will also be assigned UNDEFINED values for item cats 3, 4, and 5.

Items cataloged in WorkFlows before the upgrade on June 11, 2013, as well as items

cataloged in the month after the upgrade, are assigned the blank value for item cats 3, 4, and 5. James will work to globally convert blank item cat 3, 4, and 5 values to UNDEFINED. This process will take time to complete.

How will I use item categories 3, 4, and 5 once the code lists are approved?

Item cat 1 = fiction, nonfiction, or equipment

You will be required to assign an item cat 1 code.

Item cat 2 = the item's reading, viewing, or listening level (its current use in WorkFlows)

You will be required to assign an item cat 2 code.

Item cat 3 = the item's general format (book, equipment, kit, movie, music, periodical, etc.)

You will be required to assign an item cat 3 code based on the item type code assigned to that item.

Item cat 4 = the item's genre (mystery, romance, science fiction, accelerated reader, award winner, foreign language, etc.)

The RSA Database Committee will discuss at its November 7, 2013 meeting if item cat 4 should be a required or optional code.

Item cat 5 = the item's sub-genre (accelerated reader level 4, Lincoln Award winner, December seasonal items, Spanish, etc.)

Item cat 5 is an optional code.

When will the code lists for item categories 3, 4, and 5 be ready in WorkFlows?

The item cat 3, 4, and 5 code lists will be presented to the RSA Users Group for approval at the meeting on Thursday, December 5, 2013 at 1:00 pm. To attend the Users Group meeting at the RAILS East Peoria office or online via Adobe Connect, please register on L2 at <http://www.librarylearning.info/events?eventID=15814>.

If the RSA Users Group approves the item cat 3, 4, and 5 code lists at the December meeting, the codes will be ready in WorkFlows in early 2014. ***Once a definite "go live" date in 2014 is known for the reconfigured item cat 1-2 codes and the new item cat 3-5 codes, it will be announced on the RSA listserv.*** Please stay tuned to the RSA listserv for more information in the coming weeks.

How will I batch change existing items in my collection to use item categories 3, 4, and 5?

Basic and Full Online RSA members who have completed training may use the WorkFlows item group editor wizard to perform batch changes of the new item cats in 3,000-item-per-day increments. Erica will schedule additional item group editor workshops in 2014 if necessary. Workshops will be announced on the RSA listserv and posted on the L2 calendar. Erica will also be available to visit libraries to provide item group editor training.

James will work to globally convert blank and undefined item category 3 codes to the

appropriate value depending on the item type code assigned to those items. This process will take time to complete.

How do I enter item categories 3, 4, and 5 into my 949 tag on a record in OCLC Connexion?

Once item cats 3, 4, and 5 are ready in WorkFlows, Erica will provide instructions how to edit your existing constant data templates (949 tags) in OCLC Connexion so that those templates include codes for item cats 3, 4, and 5. The instructions will be announced on the RSA listserv when they are ready, as well as posted on the RSA Connexion web page.

RSA Union List members will not need to edit constant data templates since these libraries do not import OCLC records into WorkFlows.

Can I submit my suggestions for item category 4 (genre) and item category 5 (sub-genre) codes?

Yes! RSA wants item categories 4 and 5 to be helpful for statistical tracking and searching of your collection. Please send your suggestions for new item cat 4 or item cat 5 codes to Erica at rsahelp@railslibraries.info, or call 1-866-940-4083 and ask to speak to Erica.

What if I still have questions about the new item categories?

Please send an email directed to Erica at rsahelp@railslibraries.info, or call 1-866-940-4083 and ask to speak to Erica.

The proposed item cat code list will be discussed at the RSA Database Committee Meeting at 10:00 am on Thursday, November 7, 2013. Please register on L2 if you are able to join us at the RAILS East Peoria office or online via Adobe Connect. To register for the Database Meeting on November 7, visit <http://www.librarylearning.info/events?eventID=14503>.