



## Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows Procedure

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This procedure is posted at <https://support.librariesofrsa.org/project/add-a-call-number-brand-new-item/>.

There is a video to accompany this procedure here:  
<https://www.youtube.com/watch?v=iZlAPmdjQwc>.

Follow the instructions below for cataloging an item that is new to your library. A new item is called a “call number” in WorkFlows. You will also follow these instructions when cataloging a new magazine issue in WorkFlows. For more information about cataloging magazines, please see the guide posted here:  
<https://support.librariesofrsa.org/project/guidelines-for-cataloging-magazines-in-workflows/>.

If you have any questions about this cheat sheet, please contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.

1. Log into WorkFlows using your **individual cataloging login or the TECH login** if you have not yet been assigned an individual login.
2. Go to the **Cataloging module**.
3. Open the **Call Number and Item Maintenance wizard**.
4. Search for a bibliographic record that matches your item.
  - Search by ISBN first if your item has one.
  - Check your item’s title page verso for the ISBN.
  - An ISBN is entered in the General search box with no hyphens or spaces.
  - Use the 13-digit ISBN if both 10- and 13-digit ISBNs appear on your item.
  - For additional WorkFlows search strategies, see the guide posted at <https://support.librariesofrsa.org/project/search-strategy-guide-for-the-workflows-call-number-and-item-maintenance-wizard/>.
5. To open the bibliographic record, click the **Modify** button at the bottom of the screen.

6. Check the **Bibliographic screen** to make sure the record matches your item. For a list of the fields to look at on the bib record, see these cheat sheets:
  - Matching an OCLC record to your book:  
<https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-book/>.
  - Matching an OCLC record to your video or sound recording:  
<https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-video-or-sound-recording/>.
  - Matching a record to your magazine:  
<https://support.librariesofrsa.org/project/matching-a-record-to-your-magazine/>.
7. Go to the tab at the top of the screen that is labeled **Call Number/Item**.
8. Click on the **Add Call Number** button at the bottom of the window.
9. Make sure your library's WorkFlows code appears in the pop-up box.

If AG\_ALS-PDC appears in the box instead of your library, refer to the cheat sheet <https://support.librariesofrsa.org/project/change-the-default-library-in-the-call-number-and-item-maintenance-wizard/>.

10. Starting at the top of the **Call Number/Item screen**, edit the information to reflect your item:
  - a. **Call number:** Enter the call number for the item.
    - You can enter the call number as it appears on the item's spine label.
    - All letters entered into the call number field automatically appear as upper case.
    - Thirty-two characters, including spaces, may be entered into the call number box.
    - If you are entering a call number for an item with multiple pieces, such as a DVD multi-disc set or a multi-volume travel guide, which will need to allow patrons to place item-level holds in the RSAcat, please see the instructions how to enter a multi-piece call number, posted at <https://support.librariesofrsa.org/project/create-a-call-number-for-a-multi-piece-item/>.
    - If you are unsure of a nonfiction call number, prefer a call number from the following sources:
      1. Title page verso (if it is a print item)
      2. 082 field on the WorkFlows bibliographic screen
      3. Check the call number of another RSA library attached to the same bibliographic record, preferably a large public library.

4. Browse your collection by subject to check the call numbers assigned to similar items.
  5. Still unsure of the call number? Contact the RSA Help Desk.
- Once you decide the nonfiction call number, browse your collection by that number to ensure similar subjects are shelved together, which will make them easier for patrons to find.
    1. Open the Call Number and Item Maintenance wizard.
    2. Click on the binoculars with the yellow plus sign in the upper left corner to go to the Advanced Search screen.
    3. In the “Search for” box, enter the call number for which you want to browse. For example: 031
    4. For “Index,” select Call Number.
    5. For “Library,” choose your library’s WorkFlows code.
    6. Under “Type,” choose the radio button next to Browse.
    7. Click the Search button.
    8. You should see a list of call numbers assigned by your library that matches the number you entered. You will also see other call numbers your library has assigned that appear before and after that call number.
- b. **Class scheme:** DEWEY
- c. **Call library:** Your library’s WorkFlows code
- d. **Shadow call number:** Place a check mark in this box if you do not want the call number information to be visible to patrons in the RSAcat.
  - Examples of shadowed items: rental books, rotating large print collections
- e. **Item ID:** Either type or scan the barcode number assigned to the item.
  - All RSA library barcodes, except those for the Quincy Public Library, begin with an uppercase A, followed by 11 numbers.
  - If you type the barcode, do not enter any spaces in the number.
  - If you scan the barcode, make sure the number is scanned without any spaces.
- f. **Copy number:** This number is automatically generated by WorkFlows. Please do not edit this number.
- g. **Type:** Select the item type code that matches your item’s format.
  - Example item types: BOOK, CD-BOOK, DVD
  - Item type determines circulation and hold rules.
  - Assigning an item type to each item cataloged is required.

- RSA recommends customizing the item type menu to only include those codes assigned to your collection.
  - The complete list of item type codes is posted at <https://alsi.sdp.sirsi.net/custom/web/RSAweb/SystemInfo/Parameters/Item%20Types.xls>.
- h. **Item library:** Your library's WorkFlows code
- i. **Home location:** Select a home location code that indicates where the item is shelved in your library.
- Example home locations: FICTION, NONFICTION, REFERENCE
  - Assigning a home location to each item cataloged is required.
  - RSA recommends customizing the home location menu to only include those codes assigned to your collection.
  - The complete list of home location codes is posted at <https://alsi.sdp.sirsi.net/custom/web/RSAweb/SystemInfo/Parameters/Home%20Location%20Codes.xls>.
- j. **Current location:** The current status of the item. This value cannot be edited.
- Example current locations: CHECKEDOUT, FICTION, INTRANSIT, MISSING
  - The current location may differ from the home location.
- k. **Item cat 1:** Select FICTION or NONFICTION, depending on the item's content.
- The EQUIPMENT item cat 1 code can be used for any items that do not have fiction or nonfiction content.
  - Assigning an item cat 1 to each item cataloged is required.
  - Your library's item cat 1 menu is customized.
  - UNDEFINED and UNKNOWN must be in the item cat 1 menu, but they should not be assigned to items.
- l. **Item cat 2:** Select the code that represents the item's reading, viewing, or listening level.
- The EQUIPMENT item cat 2 code can be used for any items that cannot be read, viewed, or listened to.
  - Assigning an item cat 2 to each item cataloged is required.
  - Your library's item cat 2 menu is customized.
  - UNDEFINED and UNKNOWN must be in the item cat 2 menu, but they should not be assigned to items.

- m. **Item cat 3:** Select the code that represents the item's general format.
- Item cat 3 is used for collection statistics and searching in the RSAcat.
  - Example item cat 3 codes: AUDIOBOOK, BOOK, MOVIE, MUSIC
  - Assigning an item cat 3 to each item cataloged is required.
  - Your library's item cat 3 menu is customized.
  - UNDEFINED and UNKNOWN must be in the item cat 3 menu, but they should not be assigned to items.
  - The complete list of item types and their corresponding item cat 3 codes is posted at <https://alsi.sdp.sirsi.net/client/search/asset/3842>.
- n. **Item cat 4:** Select a code that represents the item's genre or subject.
- Item cat 4 is used for collection statistics and searching in the RSAcat.
  - Example item cat 4 codes: ROMANCE, MYSTERY, WESTERN
  - Assigning an item cat 4 to each item cataloged is strongly recommended but not required.
  - Your library's item cat 4 menu may be customized, or it can be left uncustomized.
  - UNDEFINED should be assigned to items not assigned an item cat 4 code.
  - The complete list of item cat 4 codes is posted at <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>.
- o. **Item cat 5:** Select a code that represents the item's sub-genre or secondary subject.
- Item cat 5 is used for collection statistics and searching in the RSAcat.
  - Example item cat 5 codes: AR-LEVEL1, HOL-XMAS, MOVIE-R
  - Assigning an item cat 5 to each item cataloged is optional.
  - Your library's item cat 5 menu may be customized, or it can be left uncustomized.
  - UNDEFINED should be assigned to items not assigned an item cat 5 code.
  - The complete list of item cat 5 codes is posted at <https://alsi.sdp.sirsi.net/client/search/asset/3863>.
- p. **Item cats 6-10:** Select UNDEFINED if it does not already appear as the default value.
- RSA is not currently using item cats 6-10.
  - If item cats 6-10 do not appear on the Call Number/Item screen, you are not running the latest version of WorkFlows. Download the latest version here: <https://support.librariesofrsa.org/project/downloads-setup/>.

- q. **Number of pieces:** Edit this number if the item contains multiple pieces, such as a multi-disc audiobook, or it contains another item, such as a CD-ROM, which will circulate with the item as one unit at check-out.
- Examples:
    - An audiobook set that contains 12 discs would be entered as 12 pieces.
    - A tablet that checks out with its charger and protective case would be entered as 3 pieces.
    - A book that checks out with an accompanying CD-ROM would be entered as 2 pieces.
  - When the multi-piece item is checked out and discharged, a pop-up box will alert circ staff that the “item has associated materials.” Circ staff must enter the override password (i.e., RSA). Circ staff will then click **Override & Checkout Item** or **Override & Return**, depending on if the transaction is a checkout or a discharge.
  - If not, all pieces are returned, circ staff should click **Do Not Return** on the pop-up box. Then contact the patron who last checked out the item.
- r. **Media desk:** Leave this box blank.
- s. **Price:** Enter the replacement cost for the item. You may round up to the next whole dollar.
- t. **Total charges:** This number is automatically generated by WorkFlows. Please do not edit this number.
- u. **Circulate:** This box should be checked.
- v. **Permanent:** This box should be checked.
- w. **Shadow item:** Place a check mark in this box if you do not want the item information to be visible to patrons in the RSAcat.
  - Examples of shadowed items: rental books, rotating large print collections, new books not yet officially released
- x. **Extended information:** Enter additional information about the item. Use of the extended information notes is optional.
  - CIRCNOTE: This note will appear as a pop-up when the item is checked out and when it is discharged in WorkFlows. A circ note does not require entry of the override password in order to close the pop-up. A circ note may be helpful to enter if you edited the number of pieces in step 10p above.
    - Example circ notes:

- Please make sure power cord is included.
- Please check for 6 discs.
- Water damage noted on front cover -- 07/08/20
- PUBLIC: This note appears in the RSAcat on the item details page. A public note is visible to patrons and can provide important information about the item.
  - Example public notes:
    - Please visit the Adult Services Desk to check out the iPad. Self-check stations cannot be used to check out iPads.
    - This book was purchased with LSTA grant funds.
    - The CD that accompanies the book is missing.
  - STAFF: This note only appears when the item record is viewed in WorkFlows. The note is intended for staff purposes only.
    - Example staff notes:
      - Laptop protective case scratched -- 9/18/14
      - Entered as a brief record because only an encoding level 3 OCLC record is available -- 4/29/14
      - Donated in memory of Nancy Taylor.

11. Click the **Save** button at the bottom of the screen.

Your library's item will appear first in the title / call number / item tree on the left side of the Call Number/Item screen. Below your item in the tree will be the other RSA libraries' items attached to that same bibliographic record. Here is an example tree, indicated in red:

The screenshot shows the 'Call Number and Item Maintenance' window. The title bar reads 'Call Number and Item Maintenance x'. The main title is 'Pete the cat and the missing cupcakes / Dean, Kim, 1969- author, illustrator.'. Below the title are tabs for 'Control', 'Bibliographic', 'Call Number/Item', and 'Bound-with'. The 'Call Number/Item' tab is active, showing a tree view of call numbers and items. The tree view is highlighted with a red box. The tree structure is as follows:

- [-] Pete the cat and the missing cupcakes - D...
  - [+] AC-CENT-SD (A0\_ / A1\_)
    - [+] E DEA - A1\_A-C-JRH
      - [+] A87400245826 - 1 - BOOK - EASY
  - [+] A5-ALWD-SD (A5\_ / A6\_)
    - [+] E DEA - A6\_ALWD-ES
      - [+] A86411246592 - 1 - BOOK - EASY
  - [+] AB-SD (AB / AB2 / AV)
    - [+] E (DEA) LIT - AB2NGDN-GS
      - [+] A96000092642 - 1 - BOOK - EASY

The right pane shows 'Item Info' and 'Holds' tabs. The 'Item Info' tab is active, showing the following fields:

- Call number information
  - Call number: E DEA
  - Call library: A1\_A-C-JRH
  - Shadow call number
- Item information
  - Item ID: A87400245826
  - Type: BOOK
  - Home location: EASY
  - Item cat1: FICTION

At the bottom of the window, there are several fields for dates and times:

- Date created: 4/4/2017
- Date last charged: Never
- Date due: none
- Last discharged: Never
- Date inventoried: Never
- Times inventoried: 0