Cataloging an Item (Duplicate Copy) On a Bibliographic Record in WorkFlows Procedure

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This procedure is posted at https://support.librariesofrsa.org/project/add-an-item-duplicate-copy/.

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 a duplicate copy of an item already owned by your library (e.g., a second copy of the same book). A duplicate copy is called an "item" in WorkFlows. These instructions will assign the same call number from your first item to the duplicate copy.

If you have any questions about this cheat sheet, please contact the RSA Help Desk at 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 was used to catalog your library's first copy of the title.
    - 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 sheet

- 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 Item** button at the bottom of the window.

9. Make sure your library's WorkFlows code appears in the pop-up box.

10. Starting at the top of the **Call Number/Item screen**, edit the information to reflect your item:

   a. **Call number:** The same call number as your library's first copy is assigned to this item. No edit is necessary to the call number.
      - If you want to include the copy number in the call number (e.g., FIC SMI C.2), click the Delete button at the bottom of the screen, and then click Add Call Number.
      - A new Call Number/Item screen will open. From there, you can enter a new call number with the copy number in it (e.g., FIC SMI C.2).

   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.
        o 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.
        o 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.
        o 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.

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

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