

# **Creating a Brief Record Guide**

Last updated: October 10, 2024

This guide is available here: <a href="https://support.librariesofrsa.org/project/create-a-brief-record/">https://support.librariesofrsa.org/project/create-a-brief-record/</a>.

There is a series of videos to accompany this guide.

- How to Create a Brief Record with an ISBN: <a href="https://www.youtube.com/watch?v=3bSrER2obdY">https://www.youtube.com/watch?v=3bSrER2obdY</a>.
- How to Create a Brief Record with an ISSN: <a href="https://www.youtube.com/watch?v=VlChSwJ6qmk">https://www.youtube.com/watch?v=VlChSwJ6qmk</a>.
- How to Create a Brief Record with a UPC: https://www.youtube.com/watch?v=4dCmpA7nz\_Q.
- How to Create a Brief Record Without an ISBN, ISSN, or UPC: https://www.youtube.com/watch?v=jc9aat4hTDE.
- 1. Log into WorkFlows using your library's TECH account. If you have been assigned an individual cataloger account, please use that login instead of TECH.
- 2. Click on the Cataloging module at the top of the screen.
- 3. Use the Call Number and Item Maintenance wizard to search for a full OCLC or brief bibliographic record for your item.

#### **Important:**

- If you find a matching record, either full OCLC or brief, already in WorkFlows, attach your 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 full record is imported into WorkFlows from OCLC. If your record is not overlaid, your holds will not transfer to the full OCLC record.
- If only a brief record is available, and your library uses OCLC Connexion, search Connexion for a matching record and import it into WorkFlows to overlay the brief record. Contact <a href="help@rsanfp.org">help@rsanfp.org</a> if the brief record is not overlaid.
- If there is no matching record for your item in WorkFlows or OCLC Connexion (if your library uses Connexion), create a brief record. Continue to step 4 below.

- 4. In the Cataloging module, from the Titles group on the left side of the screen, open the Add Title wizard. If a pop-up box appears, warning you that call number information cannot be modified for your library, try the steps below (you should only need to do these steps once):
  - a. Close the pop-up box with the warning.
  - b. Put your mouse cursor over the Add Title wizard and right click.
  - c. Select Properties.
  - d. Once the properties box opens, check the entries template menu to ensure TEMPLATE is selected.
  - e. Click OK to close the Properties box.
  - f. Left click to reopen the Add Title wizard. The pop-up box with the warning should not appear.
- 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.

If the item is a book, book on CD, Playaway, Vox, or Wonderbook, and both an ISBN and UPC appear on the item, prefer the ISBN. Enter the ISBN in the 020 field. No need to enter the UPC in the 024 field.

	Examples:	
$\nabla$	IQDNI	

isbn ∠	020	9780355398754
<b>ISBN</b>	020	9791027601387
<b>∠ISBN</b>	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:

<b>⊒</b> ISSN	022	0032-4558
<b></b> ISSN	022	0272-961X

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

If the item is a Blu-ray, DVD, or music CD, and both an ISBN and UPC appear on the item, prefer the UPC. Enter the UPC in the 024 field. No need to enter the ISBN in the 020 field.

If the item is a purchased binge box with a single UPC, but an ISBN also appears on the item, prefer the UPC. Enter the UPC in the 024 field. No need to enter the ISBN in the 020 field.

# Examples:

■Standard identifier#	024	826150208925
Standard identifier#	024	191329208410

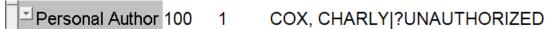
d. Author (100): Enter the author's name in ALL CAPS in the LASTNAME, FIRSTNAME format.

# Examples:

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

If UNAUTHORIZED automatically appears after the author's name in the 100 field, there is no authority record in WorkFlows to control that name to the authorized form found in the Library of Congress authority file. No need to report the unauthorized heading to the RSA Help Desk. The unauthorized name will continue to be searchable in WorkFlows and the RSAcat.

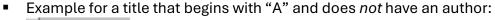
# Example:



- e. Title (245): <u>Required</u> 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:

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

• Example for a title that begins with "A" and has 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 item that is helpful for the patron to know, such as (but not limited to) the pieces in a kit or game, large print, series information, abridged versus unabridged, DVD versus Blu-ray, wide screen versus full screen, playing or listening time, or a movie rating. See the appendix of this document for examples of brief records with 500 fields. No need to enter the general note in ALL CAPS.
- g. Cataloger Email (592): 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. When RSA is ready to contact you for the item to be cataloged on an OCLC record, we will know the best way to contact you based on what you enter in the 592 field.

If the item (e.g., puzzle, equipment, or toy) cataloged on the brief record should stay cataloged on that record and not be upgraded to an OCLC record, backspace the auto-generated \*\*Required Field\*\* text in the 592 field. Type "leave as brief" into the 592 field (but without quotation marks). "Leave as brief" will tell RSA to leave the item as-is on the brief record and not place a copy-level hold to upgrade it to an OCLC record.

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 the ISBN. Do not use hyphens or spaces.

If the item is a book, book on CD, Playaway, Vox, or Wonderbook, and both an ISBN and UPC appear on the item, prefer the ISBN. Enter the ISBN as the title control number beginning with i

# 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.

If the item is a Blu-ray, DVD, or music CD, and both an ISBN and UPC appear on the item, prefer the UPC. Enter the UPC as the title control number beginning with U

If the item is a purchased binge box with a single UPC, but an ISBN also appears on the item, prefer the UPC. Enter the UPC as the title control number beginning with U

#### Examples:

Title control number:	U826150208925	
Title control number:	U191329208410	

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

Example:

Title control number: a2251125

- 7. On the Call Number/Item tab, enter your item's information, including its call number, item ID, item type, home location, item categories, price, and notes (if necessary). Remember that assigning item categories 1, 2, and 3 is required, item category 4 is recommended, and item category 5 is optional.
- 8. Click the Save button at the bottom.

# **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 <a href="mailto:help@rsanfp.org">help@rsanfp.org</a>.

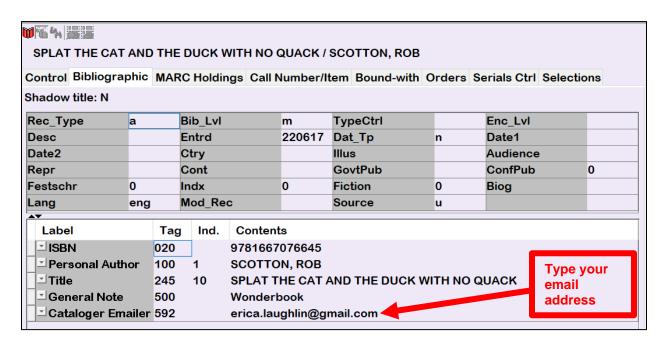
# Resource Sharing Alliance

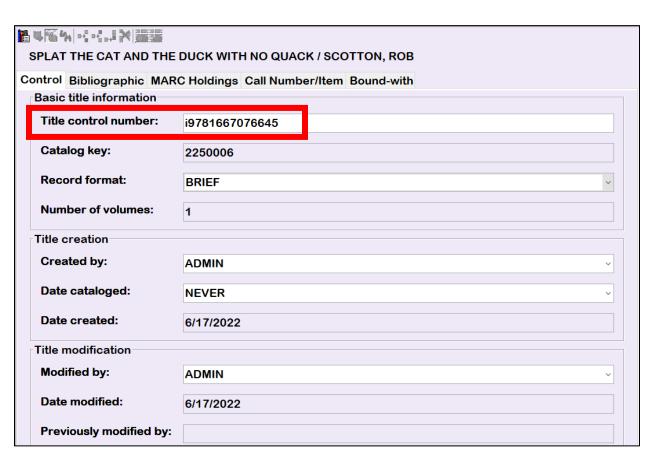
# **Appendix: Example Brief Records**

# Contents

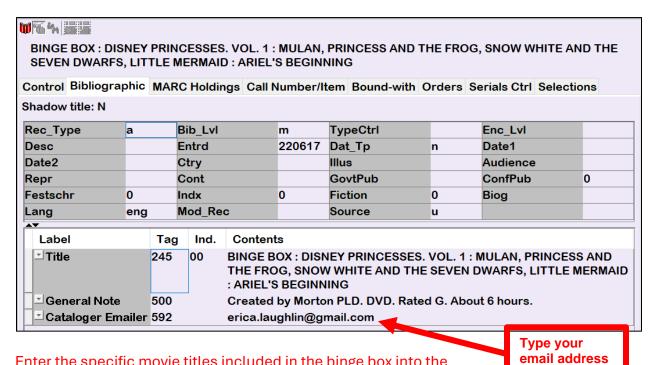
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# Audio-Enabled Book (Wonderbook, Vox)

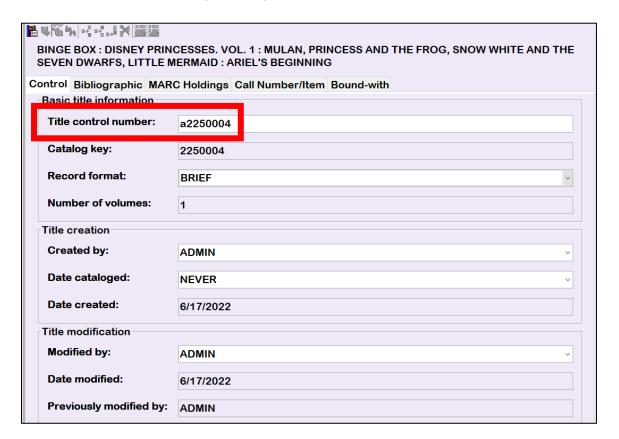




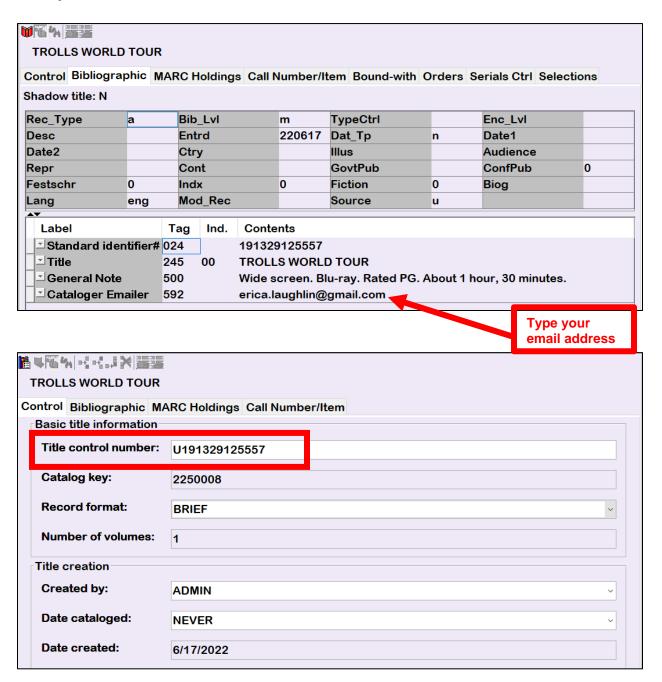
#### Binge Box



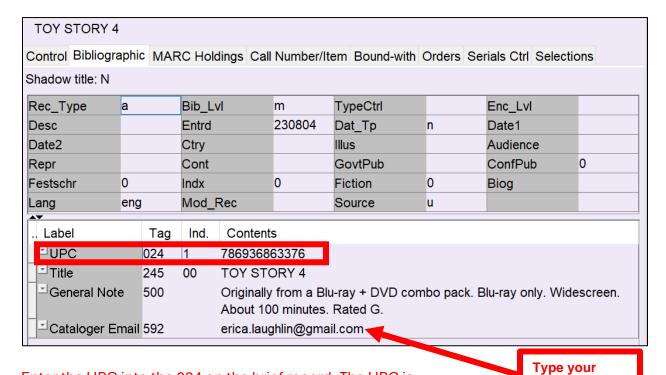
Enter the specific movie titles included in the binge box into the 245 field after the name of the overall binge box. Entering the titles in the 245 field ensures they are fully searchable in WorkFlows and the RSAcat.



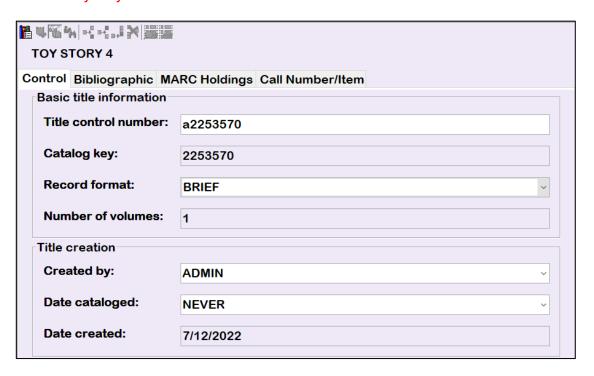
# Blu-ray



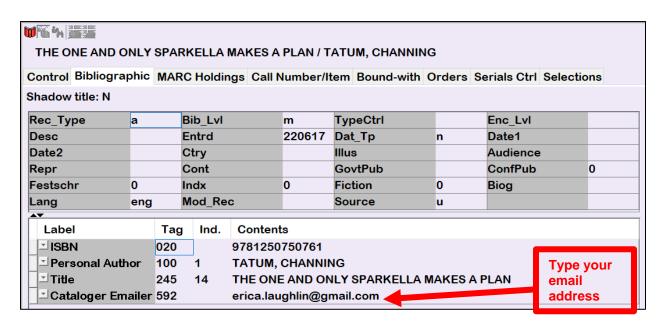
# Blu-ray Only from Blu-ray + DVD Combo Pack



Enter the UPC into the 024 on the brief record. The UPC is usually found on the back of the container. Leave the autogenerated title control number beginning with "a" on the Control tab as-is. Entering the UPC in the title control number will cause the brief record to be replaced by the OCLC record that describes the Blu-ray + DVD combo pack, not the Blu-ray only.

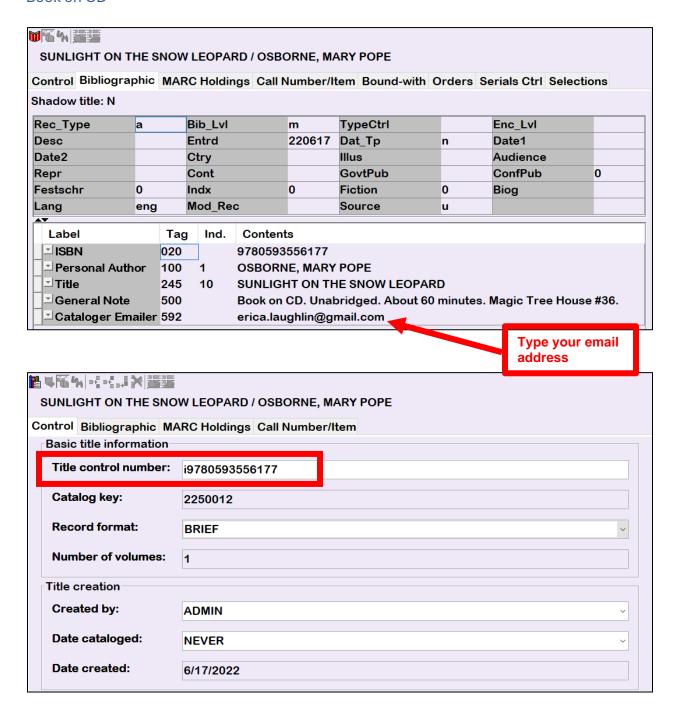


#### Book

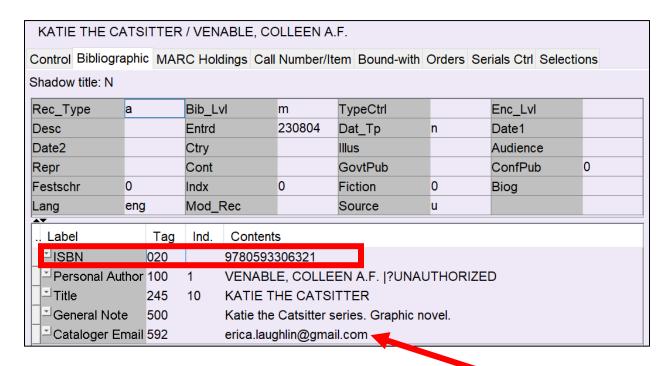




#### Book on CD



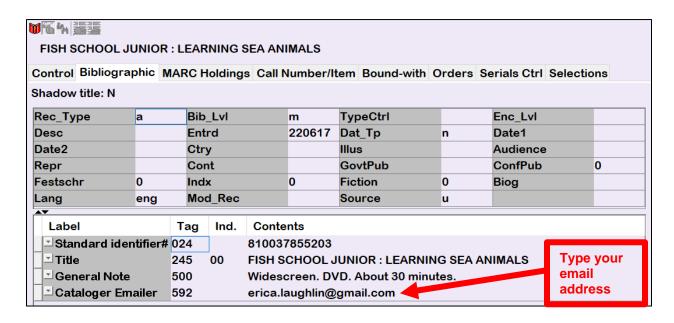
# **Book with Library Binding ISBN**



Enter the ISBN for the paperback or hardcover version of the book into the 020 and title control number fields on the brief record. The paperback or hardcover ISBN is found on the book's title page verso. Email help@rsanfp.org to ask RSA to add the library binding ISBN to the brief record. The library binding ISBN is often found on the book's back cover.

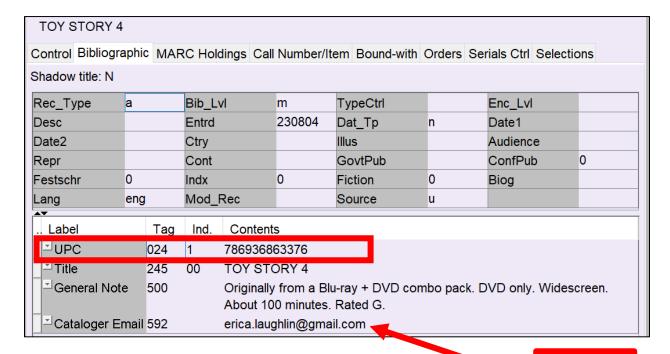


#### DVD





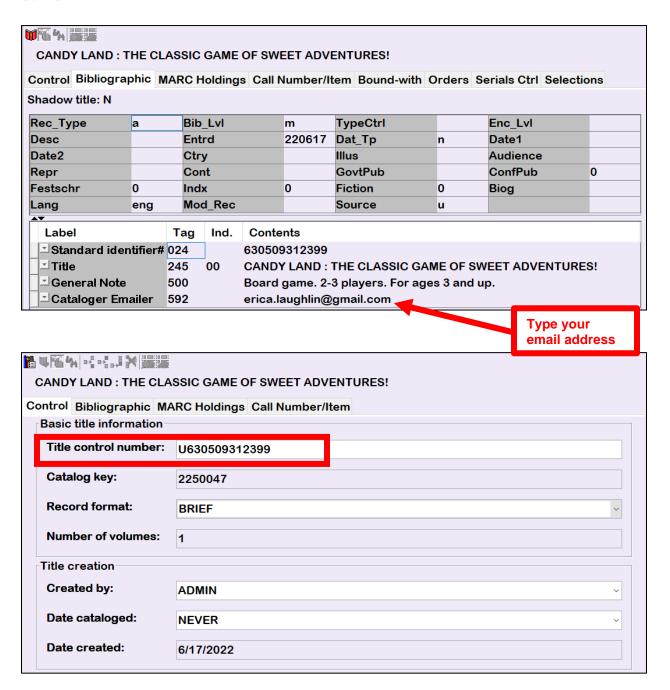
# DVD Only from Blu-ray + DVD Combo Pack



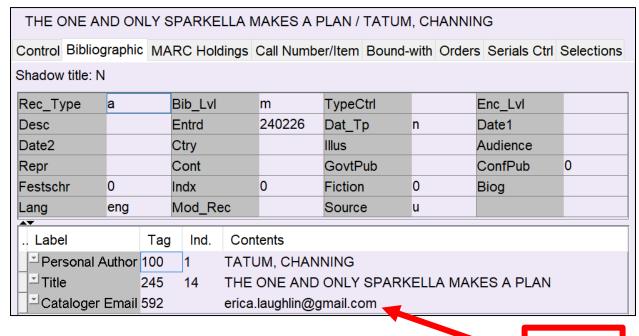
Enter the UPC into the 024 on the brief record. The UPC is usually found on the back of the container. Leave the autogenerated title control number beginning with "a" on the Control tab as-is. Entering the UPC in the title control number will cause the brief record to be replaced by the OCLC record that describes the Blu-ray + DVD combo pack, not the DVD only.



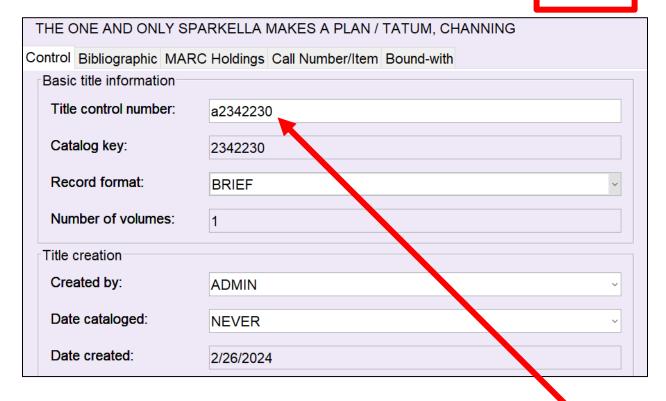
#### Game



#### Item without an ISBN

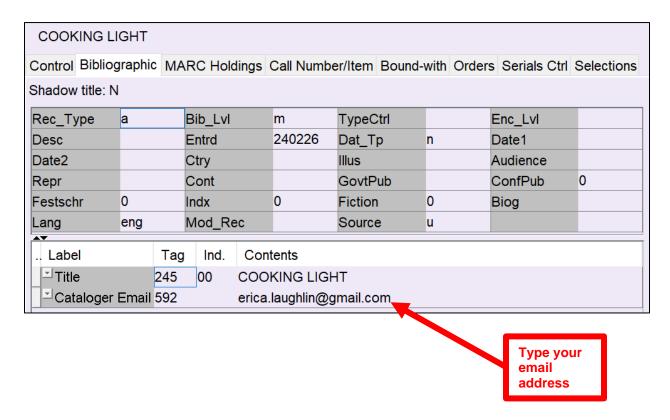


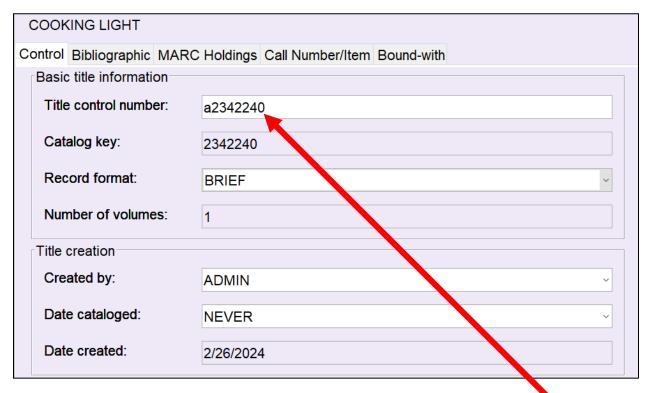
Type your email address



Leave the auto-generated title control number beginning with "a" on the Control tab as-is

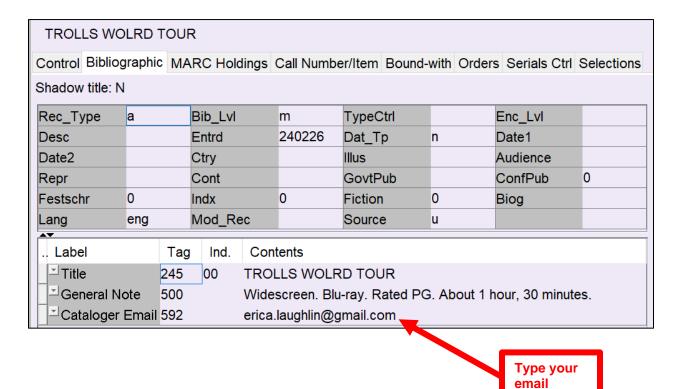
#### Item without an ISSN





Leave the auto-generated title control number beginning with "a" on the Control tab as-is

#### Item without a UPC

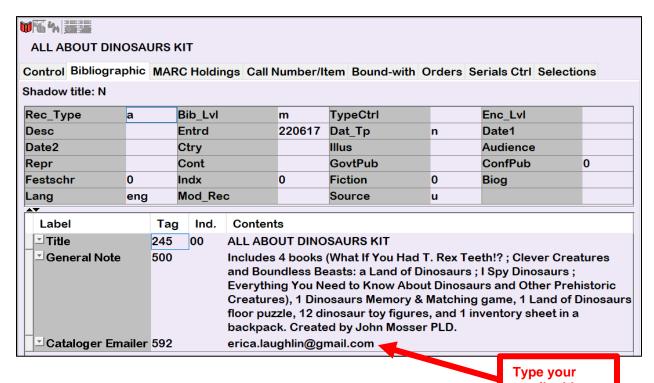


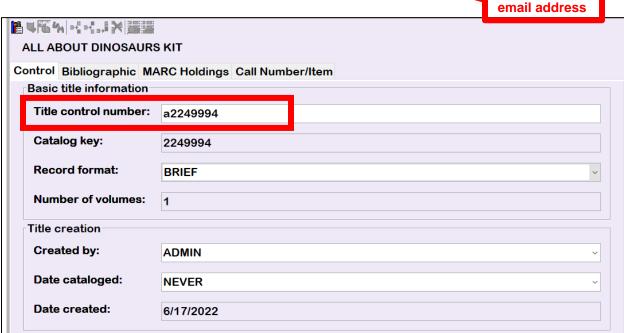
TROLLS WOLRD TOUR Control Bibliographic MARC Holdings Call Number/Item Basic title information Title control number: a2342232 Catalog key: 2342232 Record format: **BRIEF** Number of volumes: 1 Title creation Created by: ADMIN Date cataloged: **NEVER** Date created: 2/26/2024

Leave the auto-generated title control number beginning with "a" on the Control tab as-is

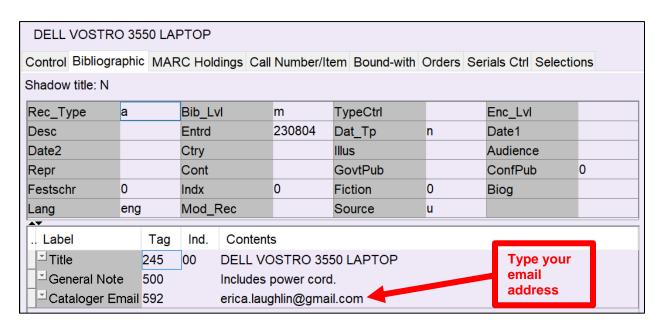
address

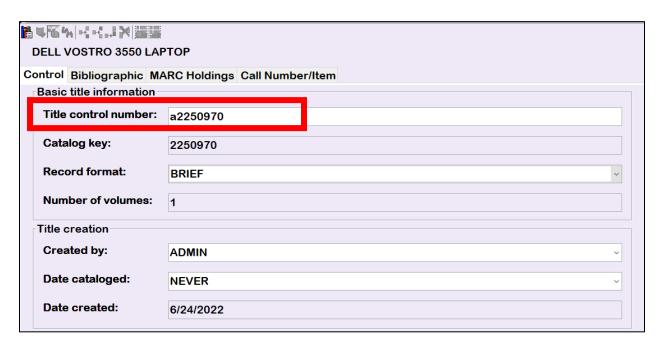
#### Kit



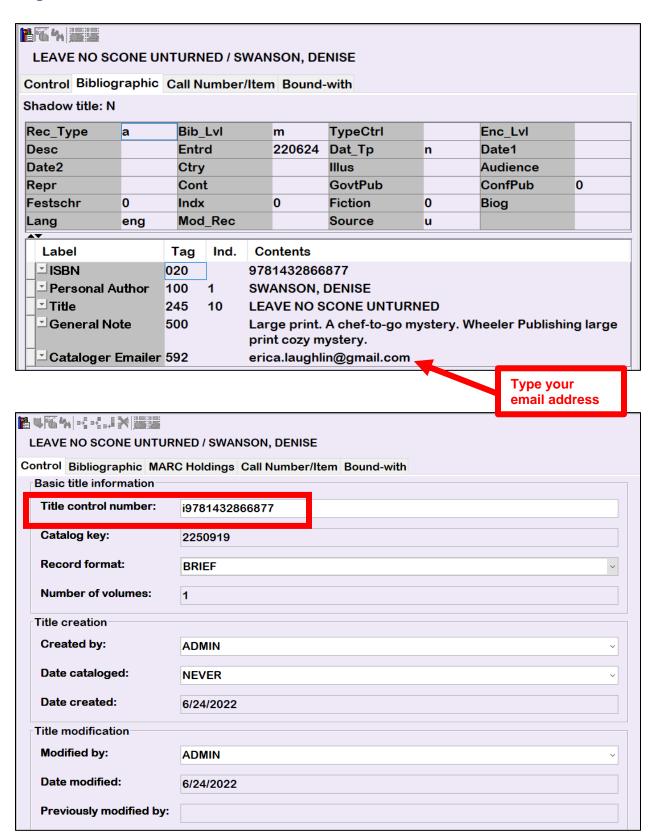


# **Laptop Computer**

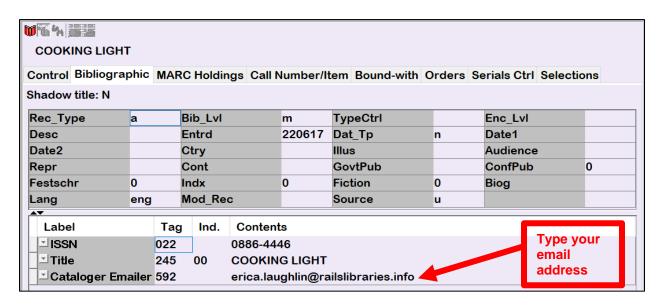




# Large Print Book

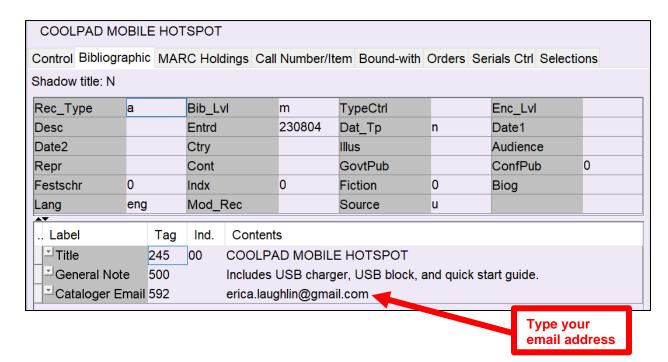


# Magazine



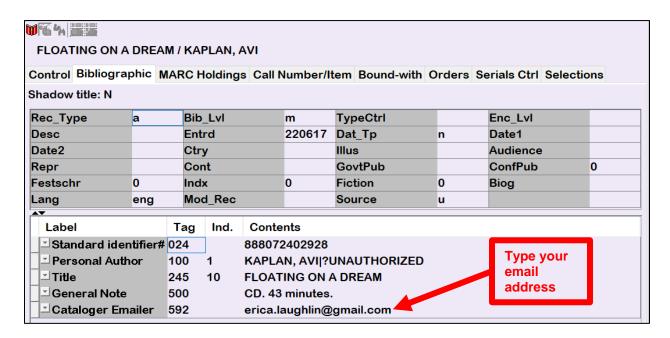


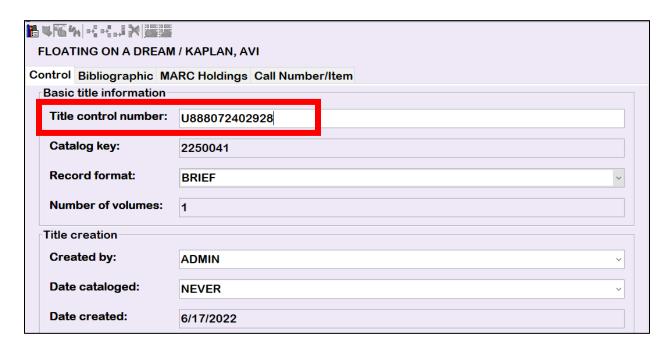
#### Mobile Hotspot



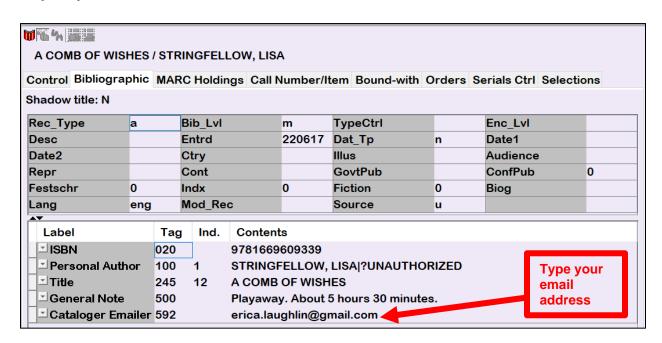


# Music CD



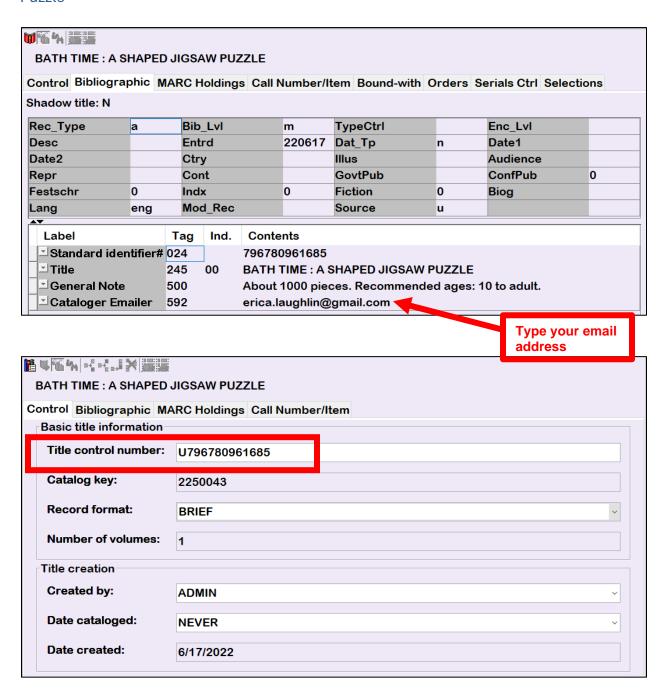


# Playaway

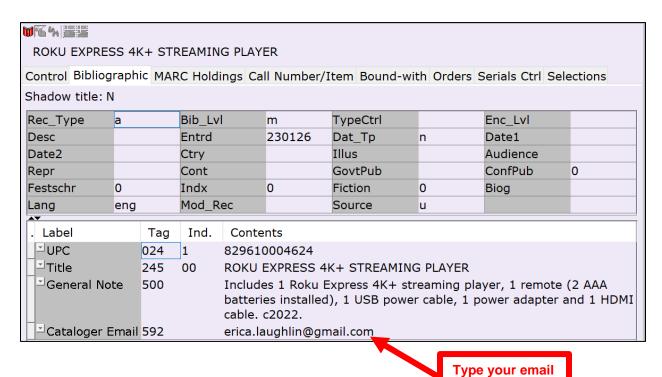




#### Puzzle



# Streaming Media Player



ROKU EXPRESS 4K+ STREAMING PLAYER Control Bibliographic MARC Holdings Call Number/Item Bound-with Basic title information Title control number: U829610004624 Catalog key: 2282509 Record format: BRIEF Number of volumes: Title creation Created by: ADMIN Date cataloged: **NEVER** Date created: 1/26/2023

address

#### Video Game

