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Cataloging Magazines in WorkFlows Guide

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This guide is available here: <https://support.librariesofrsa.org/project/guidelines-for-cataloging-magazines-in-workflows/>

Questions? Please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

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Magazine Cataloging Option 1: Call Number & Item Maintenance

RSA libraries may use the Call Number & Item Maintenance wizard in the WorkFlows Cataloging module to catalog their magazines. This is the same wizard used to catalog books, Blu-rays, DVDs, audiobooks, etc.

Instructions for the Call Number & Item Maintenance wizard are available [here](#). Although these instructions do not specifically mention magazines, they still apply when cataloging magazines.

Using the Call Number & Item Maintenance wizard will allow you to track circulation and inventory statistics for the magazines, but it does not include the functionality to track magazine issues that are received or not received. If the Call Number & Item Maintenance wizard is used to catalog magazines, your library needs to continue keeping separate internal records to track the receipt of its magazine issues.

Magazine Cataloging Option 2: Serial Control

In addition to the Call Number & Item Maintenance wizard, RSA libraries have the option to use the Serial Control module in WorkFlows to catalog their magazines. As its name suggests, the Serial Control module is designed specifically for managing your library's serials: receiving them, gathering circulation statistics, tracking claims, and generating lost issue notices.

Please contact the RSA Help Desk at help@rsanfp.org if your library is interested in using Serial Control.

Magazine Cataloging Parameters

Select parameters, or codes, that your library will assign as it catalogs magazines in WorkFlows. It is important to select these parameters *before* you begin cataloging to ensure your magazines are entered consistently. This will allow appropriate circulation and hold access for your users, as well as for users from other RSA libraries, and also generate accurate statistics for reports.

Cataloging parameters include codes for item type, home location, and item categories 1-5. Further below are descriptions of each type of cataloging parameter.

If your library has already been cataloging magazines in WorkFlows, but you are unsure of the cataloging parameters assigned to them, please email help@rsanfp.org for a report that lists your library's magazines and the cataloging parameters assigned to them.

Item type:

Assigning this cataloging parameter is required. It indicates the item's format. The item type code will determine how the magazine should circulate (its loan period, fine structure, renewals, etc.) and if patrons will be allowed to place holds on the magazines. Example item type codes for magazines are MAGAZINE and PERIODICAL. A complete list of item type codes is posted [here](#).

Before you begin using an item type for your magazines, please complete these two checklists and send them to help@rsanfp.org:

- [Circulation rule helper checklist](#)
- [Hold rule helper checklist](#)

If you have questions about either checklist, please email help@rsanfp.org or call 1-866-940-4083.

If your library wants to potentially rework your current circulation and hold rules for magazines, please complete the two checklists linked above and send them to help@rsanfp.org.

Home location:

Assigning this cataloging parameter is required. It indicates where the items are shelved in your library. Example home location codes for magazines include MAGAZINE and PERIODICAL.

A complete list of home location codes is posted [here](#).

To add an existing code from this list to your WorkFlows home location drop-down menu, please email help@rsanfp.org.

To suggest the creation of a new item home location for your magazines, please email help@rsanfp.org.

Item category 1:

Assigning this cataloging parameter is required. It is used for generating fiction versus nonfiction statistics for monthly and yearly reports. Item category 1 also powers the Fiction / Non-Fiction search facet in the RSACat. Most magazines will be assigned an item category 1 code of NONFICTION. FICTION may be used in the case of magazines with primarily fiction content, such as literary magazines.

Item category 2:

Assigning this cataloging parameter is required. It indicates the reading level of the magazine. Item category 2 also powers the Reading Level search facet in the RSACat. Possible selections for item category 2 include ADULT, YOUNGADULT, and JUVENILE.

Item category 3:

Assigning this cataloging parameter is required. It indicates the general format and generates statistics for monthly and yearly reports. Item category 3 also powers the Format search index and search facet in the RSACat. All magazines should be assigned the PERIODICAL item category 3 code. Your library's item category 3 menu in the Call Number & Item Maintenance wizard already includes PERIODICAL.

Item category 4:

Assigning this cataloging parameter is recommended but not required. It indicates the magazine's genre or subject. Item category 4 powers the Genre search facet in the RSACat.

When deciding which item category 4 codes to assign to your magazines, keep in mind that these codes work best when assigned to multiple items in your collection, which leads to more effective searching in the RSACat.

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The complete list of item category 4 codes is posted [here](#).

To add an existing code from this list to your WorkFlows item category 4 drop-down menu, please email help@rsanfp.org.

To suggest the creation of a new item category 4 code for your magazines, please email help@rsanfp.org.

If you prefer not to assign an item category 4 code to your magazine, use UNDEFINED.

Item category 5:

Assigning this cataloging parameter is recommended but not required. It indicates the magazine's sub-genre or secondary subject. Item category 5 powers the Sub-genre search facet in the RSACat.

When deciding which item category 5 codes to assign to your magazines, keep in mind that these codes work best when assigned to multiple items in your collection, which leads to more effective searching in the RSACat.

The complete list of item category 5 codes is posted [here](#).

To add an existing code from this list to your WorkFlows item category 5 drop-down menu, please email help@rsanfp.org.

To suggest the creation of a new item category 5 code for your magazines, please email help@rsanfp.org.

If you prefer not to assign an item category 5 code to your magazine, use UNDEFINED.

Magazine Call Numbers

Attach an item ID to each magazine issue that will circulate.

Use the issue date as the call number for each magazine that is cataloged in WorkFlows.

To ensure your magazines sort chronologically in WorkFlows and the RSACat, use YYYY/MM/DD as your call number convention. For example:
2024/01/07

If patrons will be allowed to place holds on magazines using the RSACat, enter an analytic character, called |Z (or “pipe Z”), at the beginning of each magazine issue’s call number. The vertical line | (or “pipe”) is created on the keyboard by simultaneously pressing the <Shift> key and the key above <Enter> with the slash (\).

The presence of the |Z in the call number will allow patrons to place a hold on a specific magazine issue from the RSACat. If the |Z is not used in the call number, the patron will only be able to place a title-level hold on the magazine in the RSACat. The first available magazine issue will fill the hold, and the patron will likely not receive their desired issue.

If the magazine has only a year, use |Z before the 4-digit year.

Example: |Z2025

If the magazine has a month and year, use |Z before the 4-digit year, followed by a slash, and the 2-digit month.

Example: |Z2025/01

If the magazine has a month, day, and year, use |Z before the 4-digit year followed by a slash, the 2-digit month followed by a slash, and the 2-digit day.

Example: |Z2025/01/07

If the magazine has a season and year, use |Z before the 4-digit year followed by a slash, then enter the season abbreviation listed here:

SPR

SUM

FALL

WIN

Example: |Z2025/WIN

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Annual Magazine Records

Starting in 2024, RSA began creating new records in WorkFlows each year for the following magazine titles:

Better Homes and Gardens
Consumer Reports
Good Housekeeping
National Geographic
The New Yorker
People
Time

Each of the above titles had at least 800 library issues attached to its comprehensive record, which describes all the publication years of that magazine.

RSA creates annual magazine records each November for the upcoming year and announces them on the Cataloging email forum. Subscribe to the forum [here](#).

Using annual records eases the cataloging of the magazine in the Call Number & Item Maintenance wizard, as well as improves search and display in both WorkFlows and the RSACat.

Annual records describe issues of that magazine only published during a single year. Libraries will attach their issues for that year to the annual record.

For example, if cataloging a 2025 issue of *People*, search *People* in the Call Number & Item Maintenance wizard using the periodical title field.

In the result list, look for *People* with [2025] in its title and 2025 listed as the pub. year.

Call Number and Item Maintenance ×

Number and Item Maintenance

Author: AND Title: AND Search

Series: AND Subject: AND Reset

General: AND Periodical Title:

Library:

Current: [The New Yorker \[2025\] --- TEST --- ID:2379425-1001 --- Ctrl#:a2379425 --- Copy:1](#)

ADVANCED SEARCH KEYWORD Periodical Title PEOPLE, ALL: 23 records

Title	Author	Carrier Type	Pub. Year	Library Copies
People [2025]			2025	1
People [2024]			2024	1714
PETA global		volume	2017	8
Top 100 careers without a fou...			2007	0

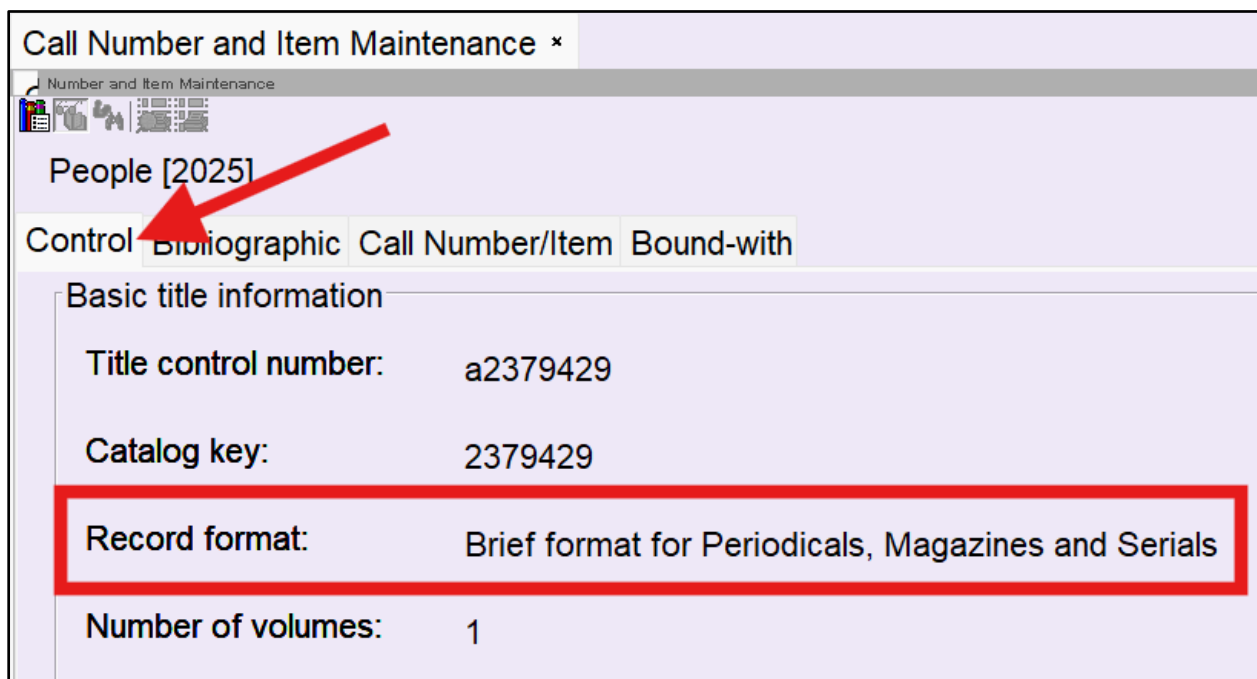
Select *People* [2025] from the result list.

Click Modify at the bottom of the screen to open the record.

Then click Add Call Number at the bottom of the screen to attach the new issue to the annual record.

Annual magazine records are assigned the BRIEF-SER record format in WorkFlows because they are locally created for use only in WorkFlows and not true OCLC records, which are assigned the SERIAL record format.

You can see the record format by looking on the Control tab in the Call Number and Item Maintenance wizard, then the line that reads "Record format." It will say "Brief format for Periodicals, Magazines and Serials" for each annual record, as shown below.



Call Number and Item Maintenance ×

Number and Item Maintenance

People [2025]

Control Bibliographic Call Number/Item Bound-with

Basic title information

Title control number: a2379429

Catalog key: 2379429

Record format: Brief format for Periodicals, Magazines and Serials

Number of volumes: 1





The BRIEF-SER format causes the annual records to appear on the brief record report. There is no harm in the annual records being listed on the brief record report. Feel free to ignore them as you review the report.

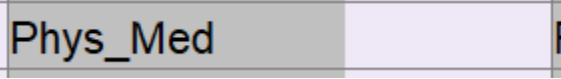

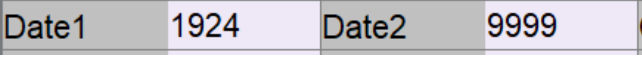
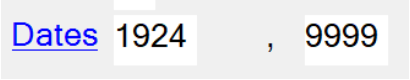
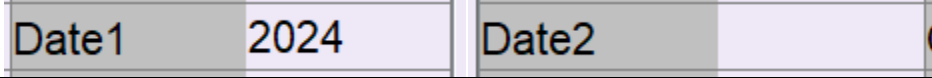
Libraries that use the WorkFlows Serial Control module will continue using the comprehensive records to catalog their magazine issues. Using the comprehensive records avoids the need to create new serial control records on the annual records. A Serial Control library may choose to enter their magazines on the annual records if they create new serial controls.



Matching a Record to Your Magazine

Catalog magazines using the record that is the best match with the fullest bibliographic description. Search WorkFlows first for a matching a record. Attach if there is a match in WorkFlows. Catalogers with OCLC Connexion or Record Manager access should only import an OCLC record into WorkFlows if there is no existing match.

Compare the fields below on the record to your magazine. Not all of these fields will appear on every record. The most important fields to compare are in **bold**.

<u>FIELD</u>	<u>FUNCTION</u>
<p>Enc_Lvl (WorkFlows)</p> <p>or</p> <p>ELvl (OCLC)</p>	<p>Encoding Level</p> <p>This field should always be present on the record, even if its value is blank.</p> <p>The encoding level indicates the level of detail used in the record's bibliographic description.</p> <p>Use the record with the fullest bibliographic description that matches your magazine.</p> <p>Only use an encoding level 3 record, with minimal, "bare bones" bibliographic description, if it is the only match available.</p> <p>Example in WorkFlows: </p> <p>Example in OCLC: </p>
<p>Bib_Lvl (WorkFlows)</p> <p>or</p> <p>BLvl (OCLC)</p>	<p>Bibliographic Level</p> <p>This field should always be present on the record.</p> <p>Check this value to make sure it is s (for serial).</p> <p>Example in WorkFlows: </p> <p>Example in OCLC: </p>

<p>Phys_Med (WorkFlows)</p> <p>or</p> <p>Form (OCLC)</p>	<p>Form of Item</p> <p>This field should always be present on the record.</p> <p>blank = regular print a = microfilm b = microfiche f = Braille s = electronic</p> <p>Example in WorkFlows: </p> <p>Example in OCLC: </p>
<p>Date1 Date2 (WorkFlows)</p> <p>or</p> <p>Dates (OCLC)</p>	<p>Includes two fields: Date 1 and Date 2.</p> <p>These fields should always be present on the record.</p> <p>A magazine record should have a beginning date (Date 1) and an ending date (Date 2) of publication.</p> <p>A magazine that is currently published has a Date 2 value of 9999.</p> <p>Example in WorkFlows: </p> <p>Example in OCLC: </p> <p>Annual magazine records use the publication year they describe as Date 1 and a blank value for Date 2.</p> <p>Example: </p>
<p>022</p>	<p>ISSN (International Standard Serial Number)</p> <p>This field may or may not be present on the record.</p> <p>Compare the ISSN listed first in the 022 field to your magazine.</p> <p>Example:</p>

	<p>022 0 0093-7673 0093-7673 21</p> <p>While ISSN is an effective way to match an OCLC record to your magazine, ISSN should not be the <i>only</i> field considered. Be sure to look at the rest of the fields in this chart.</p>
040 DLC	<p>Library of Congress as Cataloging Source</p> <p>This field may or may not be present on the record.</p> <p>When possible, use a record created by the Library of Congress, indicated by DLC in its 040 field. The Library of Congress, however, does not create a record for every magazine published in the United States.</p> <p>Example:</p> <p>040 NYG beng cNYG dDLC</p> 
040 b eng	<p>English Language Records</p> <p>This field may or may not be present on the record.</p> <p>If present, the 040 subfield b should contain eng, or the 040 b will not be present at all. 040 b eng and the lack of it both indicate certain fields on the record, such as the physical description in the 300 field, will appear in English.</p> <p>Example:</p> <p>040 NYG beng cNYG dDLC</p>  <p>If you are unable to find an English language record that matches your magazine, create a brief record following the instructions later in this guide.</p>
245	<p>Title</p> <p>This field should always be present on the record.</p> <p>Check the 245 field to make sure it matches your magazine's title.</p> <p>Look for the current publication year in brackets after the title if RSA creates an annual record for that magazine:</p> <p><i>Better Homes and Gardens</i> <i>Consumer Reports</i> <i>Good Housekeeping</i> <i>National Geographic</i></p>

	<p><i>The New Yorker</i> <i>People</i> <i>Time</i></p> <p>Example: 245 00 Better homes and gardens [2024]</p>
260	<p>Publication Information</p> <p>This field may or may not be present on the record.</p> <p>Check the 260 field to make sure the location and name of the publisher match your magazine.</p> <p>Example: 260 [New York] : b[International Magazine Co.], c[1916]-</p>
264 264 _0 264 _1 264 _2 264 _3 264 _4	<p>Production, Publication, Distribution, Manufacture, or Copyright Information</p> <p>This field may or may not be present on the record.</p> <p>The second number (or “indicator”) that appears to the right of the 264 on the record specifies the type of information described by that 264 field.</p> <p>Production information Publication information Distribution information Manufacture information Copyright notice date</p> <p>Check the 264 field to make sure the location and name of the publisher match your magazine.</p> <p>Annual magazine records use the publication year they describe in the 264 field.</p> <p>Example: 264 1 [Des Moines] : b[Meredith], c2024</p>

310	<p>Current Publication Frequency</p> <p>This field should be present on the record.</p> <p>Check how often the magazine is currently issued.</p> <p>Examples:</p> <p>310 Monthly</p> <p>310 Weekly (two issues combined at year end), b<1984-></p>
338	<p>Carrier Type</p> <p>This field may or may not be present on the record.</p> <p>The carrier type indicates the physical format of the item.</p> <p>The most frequently used carrier term for a magazine is: volume</p> <p>with the corresponding code: nc</p> <p>and the source code: rdacarrier</p> <p>Example:</p> <p>338 volume bnc 2rdacarrier</p>
590	<p>Local Note</p> <p>Annual magazine records created by RSA will include a local note to use the record for issues published only in a certain year.</p> <p>Example:</p> <p>590 Please use this record to catalog only 2024 issues of People.</p>

<p>6XX (usually 650 or 651)</p>	<p>Subject Headings</p> <p>These headings may or may not be present on the record.</p> <p>These headings indicate content – i.e., what the magazine is <i>about</i>. Retain all subject headings regardless of their source or language.</p> <p>Examples:</p> <p>650 0 Celebrities vPeriodicals.</p> <p>650 0 Pets zUnited States vPeriodicals.</p>
<p>655</p>	<p>Genre Headings</p> <p>These headings may or may not be present on the record.</p> <p>These headings indicate genre – i.e., what kind of magazine it <i>is</i>, not what it is <i>about</i>. Retain all genre headings regardless of their source or language.</p> <p>Example:</p> <p>655 7 Periodicals. 2lcgft</p> <p>Annual magazine records created by RSA will include this local genre heading:</p> <p>655 7 Annual magazine records. 2local</p>

Create a Magazine Brief Record



If no matching record is available for your magazine in WorkFlows or OCLC (if your library uses OCLC Connexion or Record Manager), create a brief record following the instructions below.

1. Log into WorkFlows using your individual cataloger account. If you have not been assigned an individual cataloger account, use your library's TECH account.
2. Click on the Cataloging module at the top of the screen.
3. 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.
4. On the Bibliographic tab, fill in the following information under "Contents":
 - a. ISSN (022): Enter the 8-digit ISSN if the item has one. Use a hyphen between the fourth and fifth digits.

Examples:

	ISSN	022	0032-4558
	ISSN	022	0272-961X

- b. Title (245): ***Required*** for all brief records. Backspace to remove the auto-generated ****REQUIRED FIELD**** text. Type the title in ALL CAPS and include initial articles *a, an, the*.

To ensure the title is fully searchable in WorkFlows and the RSACat, enter the first and second indicator values. These values are entered under the "Ind." column next to the 245, shown below.

Festschr	0	Indx
Lang	eng	Mod_Rec
.. Label	Tag	Ind. Contents
[-] ISBN	020	
[-] ISSN	022	
[-] UPC	024	1
[-] Personal Author	100	1
[-] Title	245	

When creating a magazine brief record, use a first indicator value of 0. The 0 tells WorkFlows and the RSACat that no title added entry is necessary for searching because there is no 100 author field on the brief record.

Use the second indicator to enter how many characters and accompanying spaces appear at the beginning of the title for initial articles *a*, *an*, *the*. The second indicator tells WorkFlows and the RSACat how many characters and spaces to ignore when filing titles alphabetically.

- Example magazine title that begins with *The*:

Title 245 04 THE NEW YORKER

First indicator = 0 because there is no author in the brief record's 100 field.

Second indicator = 4 because there are three characters in *the* and one accompanying space after *the* that should be ignored before filing under *New*.

- Example magazine title that begins with no initial article:

Title 245 00 PEOPLE

First indicator = 0 because there is no author in the brief record's 100 field.

Second indicator = 0 because there are no characters or spaces that should be ignored before filing under *People*.

- General Note (500): This field is optional. Use it to enter information about the magazine that is helpful for the patron to know. No need to enter the general note in ALL CAPS.
- Cataloger Email (592): **Required** for all brief records. Backspace to remove 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 magazine 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 magazine 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 magazine as-is on the brief record and not place a copy-level hold to upgrade it to an OCLC record.

- e. Held by (596): Leave this field blank. Your library’s WorkFlows code will automatically be entered into this field as the record is indexed.
5. On the Control tab, edit the title control number.
- a. 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

- b. If the item does not have an ISSN, leave the SirsiDynix auto-generated title control number as-is that begins with an ‘a’ in the title control number field.

Example:

Title control number:	a2251125
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6. On the Call Number/Item tab, enter your magazine’s information, including its call number with potential |Z, 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.
7. Click the Save button at the bottom of the screen.
8. Click the Close button at the bottom of the screen to exit the Add Title wizard.

Important:

- After a brief record is saved, and you have clicked the close button to exit the Add Title wizard, you are unable to edit information on the brief record’s control and bibliographic tabs.

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- If you made a mistake entering the brief record's ISSN, title, general note, cataloger email address, or title control number, report the mistake to help@rsanfp.org.
- If you made a mistake entering your library's call number, item ID, home location, item type, item categories, or price, make the necessary correction(s) using the Call Number and Item Maintenance wizard.

Example Magazine Brief Record

COOKING LIGHT

Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections

Shadow title: N

Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	
Desc		Entrd	220617	Dat_Tp	n	Date1	
Date2		Ctry		Illus		Audience	
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction	0	Biog	
Lang	eng	Mod_Rec		Source	u		

Label	Tag	Ind.	Contents
ISSN	022		0886-4446
Title	245	00	COOKING LIGHT
Cataloger Emailer	592		erica.laughlin@railslibraries.info

Type your email address

COOKING LIGHT

Control Bibliographic MARC Holdings Call Number/Item

Basic title information

Title control number: s0886-4446

Catalog key: 2250028

Record format: BRIEF

Number of volumes: 1

Title creation

Created by: ADMIN

Date cataloged: NEVER

Date created: 6/17/2022