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Search Strategy for the WorkFlows Call Number and Item Maintenance Wizard Guide

Last updated: November 7, 2024

This guide is posted at <https://support.librariesofrsa.org/project/search-strategy-guide-for-the-workflows-call-number-and-item-maintenance-wizard/>.

There are two videos to accompany this guide here <https://www.youtube.com/watch?v=Cz4uvys3TEA> and here <https://www.youtube.com/watch?v=qp3738BFDp4>.

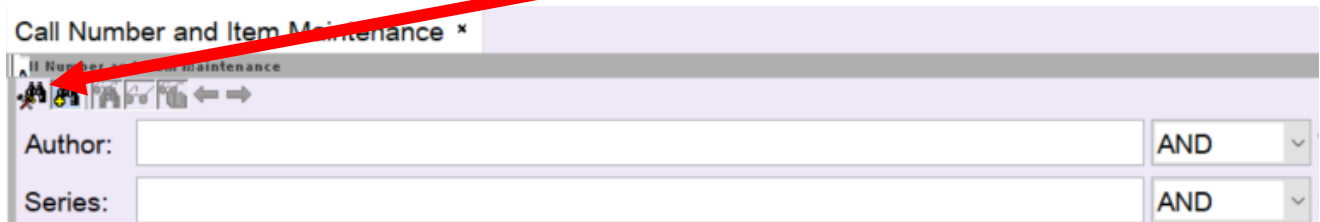
If you have questions about WorkFlows searching or suggestions for this guide, please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

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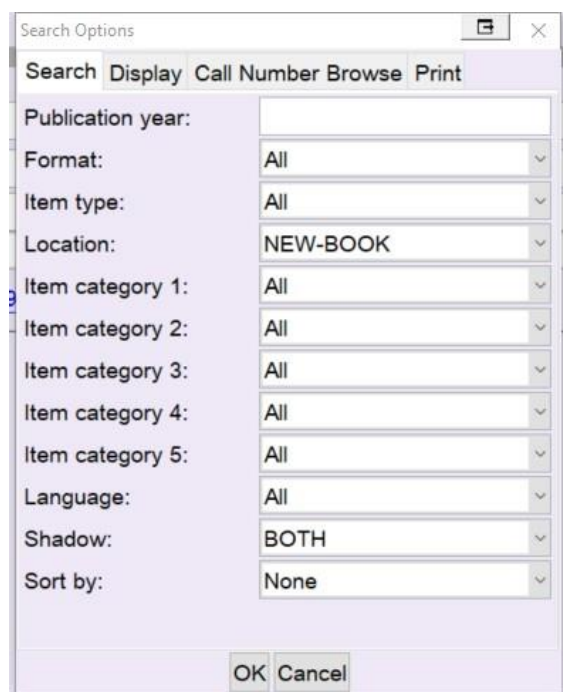
Cataloging Code

1. Click on the first helper that is black binoculars with a red X.



2. From search options box, use the drop-down menu to select the cataloging code by which you want to search to find the items assigned that particular code, such as the NEW-BOOK home location.

If the code by which you are trying to search, such as the STACKS home location, is not listed in the drop-down menu, please submit an RSA report request (<http://goo.gl/forms/Z1WG86RWO8>) to ask for a detailed report of the items assigned that particular code. The code is missing from the drop-down menu because it should not be assigned to fully cataloged items.



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- Once you select the cataloging code from the drop-down menu, click OK to close the search options box.
- Type #0 into the general field and select the library by which you want to search from the library drop-down menu.

There is no space between the # and the 0. This search string tells WorkFlows to search for all items in the library's collection that are assigned the code you selected in step 2.

Call Number and Item Maintenance *
Call Number and Item Maintenance
Author: [] AND [] T
Series: [] AND [] S
General: #0 AND [] P
Library: FLANAGN-PL
Current: [LEGO Jurassic World --- LEGO-XBOX ONE-10 --- ID:A12006655129 --- Ctrl#:o911057843 --- Cop](#)

- Hit <Enter> on your keyboard or click <Search> in WorkFlows. The items assigned the code you selected in step 2 will be listed in the results.

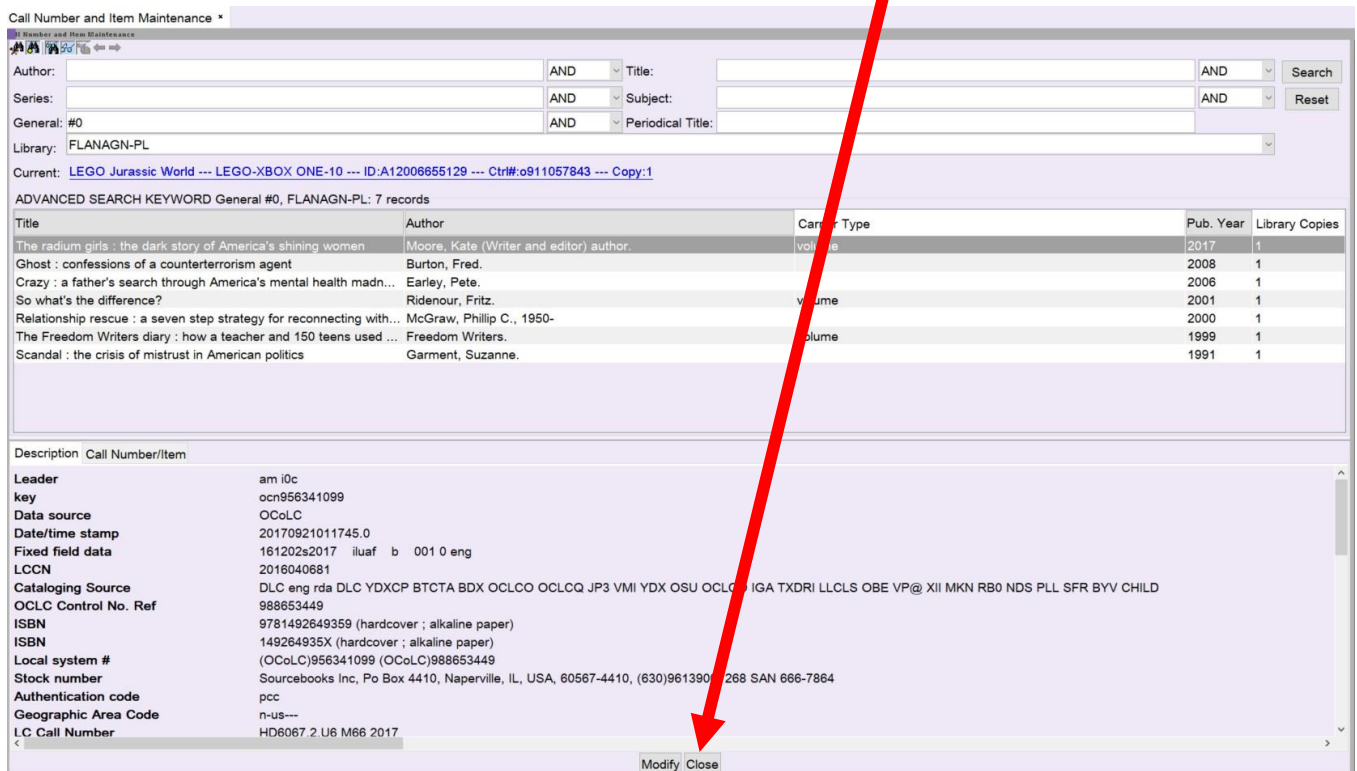
Call Number and Item Maintenance *
Call Number and Item Maintenance
Author: [] AND [] Title: [] AND [] Search
Series: [] AND [] Subject: [] AND [] Reset
General: #0 AND [] Periodical Title: []
Library: FLANAGN-PL
Current: [LEGO Jurassic World --- LEGO-XBOX ONE-10 --- ID:A12006655129 --- Ctrl#:o911057843 --- Copy:1](#)
ADVANCED SEARCH KEYWORD General #0, FLANAGN-PL: 7 records

Title	Author	Carrier Type	Pub. Year	Library Copies
The radium girls : the dark story of America's s...	Moore, Kate (Writer and editor) author.	volume	2017	1
Ghost : confessions of a counterterrorism agent	Burton, Fred.		2008	1
Crazy : a father's search through America's m...	Earley, Pete.		2006	1
So what's the difference?	Ridenour, Fritz.	volume	2001	1
Relationship rescue : a seven step strategy for...	McGraw, Phillip C., 1950-		2000	1
The Freedom Writers diary : how a teacher an...	Freedom Writers.	volume	1999	1
Scandal : the crisis of mistrust in American poli...	Garment, Suzanne.		1991	1

- To look at the library's call number/item information, either double click the item in the result list or click <Modify> in WorkFlows.

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- When you are done searching for items assigned a particular code, completely shut Call Number and Item Maintenance by clicking <Close>. Re-open it and enter your next search.



Call Number and Item Maintenance *
Number and Item Maintenance

Author: AND Title: AND Search
Series: AND Subject: AND Reset
General: #0 AND Periodical Title:
Library: FLANAGN-PL

Current: [LEGO Jurassic World --- LEGO-XBOX ONE-10 --- ID:A12008655129 --- Ctrl#:o911057843 --- Copy:1](#)

ADVANCED SEARCH KEYWORD General #0, FLANAGN-PL: 7 records

Title	Author	Carrier Type	Pub. Year	Library Copies
The radium girls : the dark story of America's shining women	Moore, Kate (Writer and editor) author.	Volume	2017	1
Ghost : confessions of a counterterrorism agent	Burton, Fred.		2008	1
Crazy : a father's search through America's mental health madn...	Earley, Pete.		2006	1
So what's the difference?	Ridenour, Fritz.	Volume	2001	1
Relationship rescue : a seven step strategy for reconnecting with...	McGraw, Phillip C., 1950-		2000	1
The Freedom Writers diary : how a teacher and 150 teens used ...	Freedom Writers.	Volume	1999	1
Scandal : the crisis of mistrust in American politics	Garment, Suzanne.		1991	1

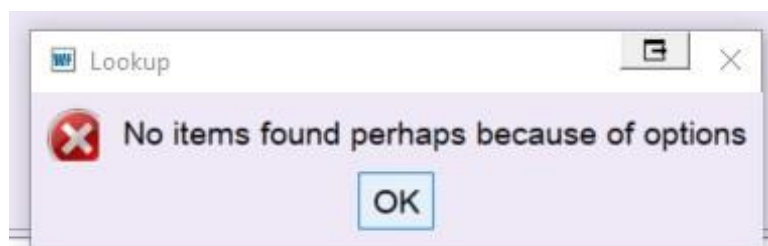
Description Call Number/Item

Leader am i0c
key ocn956341099
Data source OCoLC
Date/time stamp 20170921011745.0
Fixed field data 161202s2017 iluaf b 001 0 eng
LCCN 2016040681
Cataloging Source DLC eng rda DLC YDXCP BTCTA BDX OCLC OCLCQ JP3 VMI YDX OSU OCLC IGA TXDR I LLCLS OBE VP@ XII MKN RB0 NDS PLL SFR BYV CHILD
OCLC Control No. Ref 988653449
ISBN 9781492649359 (hardcover ; alkaline paper)
ISBN 149264935X (hardcover ; alkaline paper)
Local system # (OCoLC)956341099 (OCoLC)988653449
Stock number Sourcebooks Inc, Po Box 4410, Naperville, IL, USA, 60567-4410, (630)9613901, 268 SAN 666-7864
Authentication code pcc
Geographic Area Code n-us---
LC Call Number HD6067 2 U6 M66 2017

Modify Close

Clicking <Reset> on the Call Number and Item Maintenance screen does not reset the “All” in the search options helper.

If you do not completely shut Call Number and Item Maintenance and re-open it, you will see the error below when you enter a new search by author, title, etc., if none of the items in your search are assigned the code you selected in step 2.



Rather than seeing this error, the search results may be incomplete if some of the items for which you are searching are assigned the code you are selected in step 2. The results are misleading because only that subset of the collection is being searched – not the whole collection.

International Standard Book Number (ISBN)

Search by ISBN first if your item has one. Check inside your item, on the back of the title page, first for an ISBN, and use that ISBN to search before you use the ISBN on the back cover.

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.

The screenshot shows a web application window titled "Call Number and Item Maintenance". The interface includes a toolbar with icons for search, home, and navigation. Below the toolbar are several search fields: "Author:", "Series:", "General:", and "Library:". Each field is followed by an "AND" dropdown menu. To the right of these fields are "Title:", "Subject:", and "Periodical Title:" fields, also with "AND" dropdown menus. There are "Search" and "Reset" buttons on the right side. The "General:" field contains the value "9780786865505". The "Library:" dropdown is set to "ALL".

International Standard Serial Number (ISSN)

ISSN is the preferred search method for periodicals.

An ISSN is entered into the General search box with a hyphen between the fourth and fifth digits.

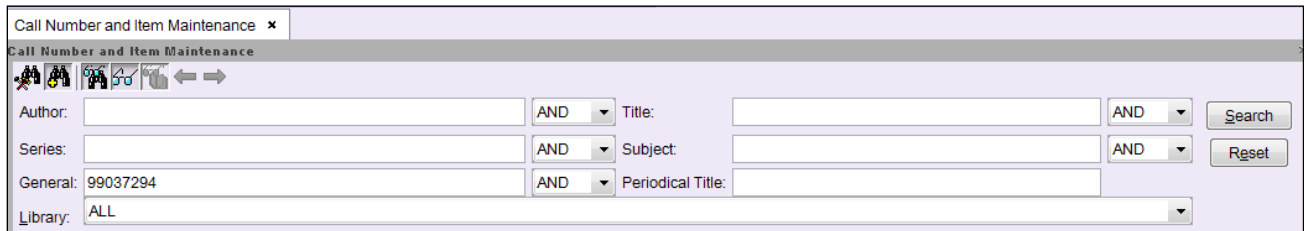
The screenshot shows the same "Call Number and Item Maintenance" search interface. The "General:" field now contains the value "0163-5506". All other elements, including the toolbar, search fields, and buttons, remain the same as in the previous screenshot.

Library of Congress Control Number (LCCN)

The LCCN can be found on the back of the title page.

If the LCCN contains a hyphen, replace it with a zero when you enter the LCCN into the General search box.

Not all books are assigned LCCNs.



The screenshot shows a web-based search interface titled "Call Number and Item Maintenance". It features several search fields: "Author:", "Series:", "General:" (containing "99037294"), "Library:" (containing "ALL"), "Title:", "Subject:", and "Periodical Title:". Each field is followed by an "AND" dropdown menu. To the right of the fields are "Search" and "Reset" buttons. The interface also includes a toolbar with various icons for navigation and editing.

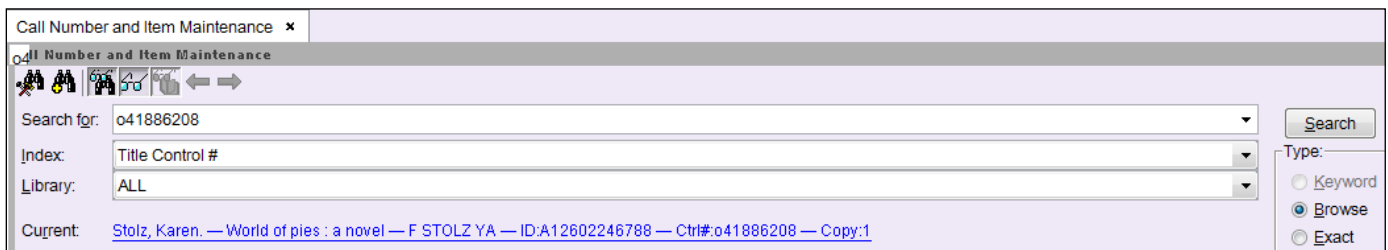
OCLC Title Control Number

All full records in WorkFlows originate from OCLC, an international database of catalog records.

Each record in OCLC is assigned a unique accession number, called the title control number. In WorkFlows the OCLC title control number can be found in the record's 001 field or on the Control tab.

An OCLC title control number search can be entered into the advanced search screen in the Call Number and Item Maintenance wizard with "Title Control #" selected as the index.

A search for an OCLC title control number is always preceded by a lower case 'o' (as in octopus).



The screenshot shows the same "Call Number and Item Maintenance" search interface. The "Search for:" field contains "o41886208". The "Index:" dropdown menu is set to "Title Control #". The "Library:" dropdown menu is set to "ALL". The "Search" button is visible. Below the search fields, the "Current:" field displays the search results: "Stolz, Karen. — World of pies : a novel — F STOLZ YA — ID:A12602246788 — Ctrl#:o41886208 — Copy:1". On the right side, there are radio buttons for "Type:" with options "Keyword", "Browse" (selected), and "Exact".

Periodical Title

This type of search will only look for titles on records assigned the serial record format.

A periodical title search can be performed as a keyword search on the main search screen or as a browse search on the advanced search screen.

Initial articles should be excluded from periodical title searches.

Periodical title keyword search:

The screenshot shows a search interface titled "Call Number and Item Maintenance". It features several input fields for search criteria: Author, Series, General, Title, Subject, and Periodical Title. The "Periodical Title" field contains the text "People". There are "AND" dropdown menus between the fields and "Search" and "Reset" buttons. A "Library" dropdown menu is set to "ALL".

Periodical title browse search:

The screenshot shows a search interface titled "Call Number and Item Maintenance". It features a "Search for:" dropdown menu with "People" selected, an "Index:" dropdown menu with "Periodical Title" selected, and a "Library:" dropdown menu with "ALL" selected. There is a "Search" button and a "Type:" section with radio buttons for "Keyword", "Browse" (which is selected), and "Exact". A "Current:" field at the bottom displays a URL: "Public Library Associatio... — Public libraries — 05&06/10 — ID:A66200769951 — Ctrl#:o03889688 — Copy:1".

Publisher Number

The publisher number is also called:

- Manufacture number
- Music number
- Production number
- Video recording number

The publisher number is only found on AV, usually on the spine of the case or on the physical item (e.g., disc).

Type the publisher number exactly as it appears on the item into the General search box.

Searching by the publisher number and the title is helpful if the publisher number has been assigned to various titles.

Call Number and Item Maintenance *
All Number and Item Maintenance
Author: [] AND [v] Title: blast from the past AND [v] Search
Series: [] AND [v] Subject: [] AND [v] Reset
General: N4749V AND [v] Periodical Title: []
Library: ALL [v]

Title Browse

This type of search will look for your search terms indexed in a title field on a record and return a list of matching records in alphabetical order.

The title search box on the advanced search screen can function as a browse search if you select “Browse” as the search type.

Initial articles should be omitted from title searches. For example, to search for *The Grapes of Wrath*, enter *Grapes of Wrath*.

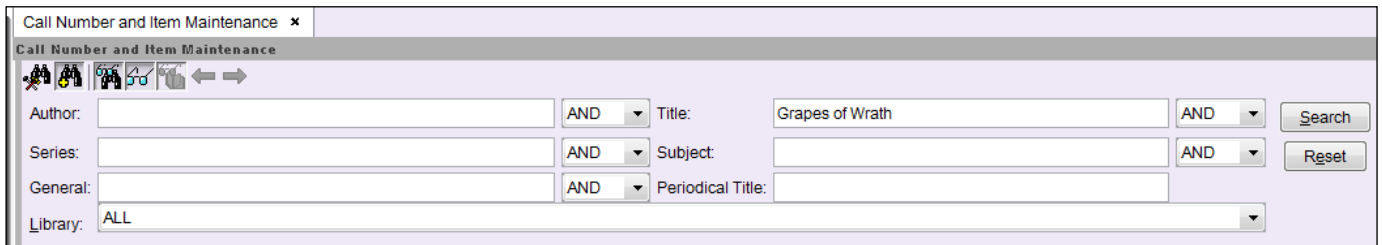
Call Number and Item Maintenance *
All Number and Item Maintenance
Search for: Grapes of Wrath [v] Search
Index: Title [v]
Library: ALL [v]
Type: [v] Keyword [] Browse [x] Exact []
Current: [Midnight Sun Productions ... — Blast from the past \[videorecording\] — VIDEO 1932 — ID:A12102174122 — Ctrl#:o41965032 — Copy:1](#)

Title Keyword

This type of search will look for your search terms contained anywhere on a record and return a list of those matching records in no particular order.

The title search box on the main search screen performs a keyword search.

Initial articles should be omitted from title searches. For example, to search for *The Grapes of Wrath*, enter *Grapes of Wrath*.



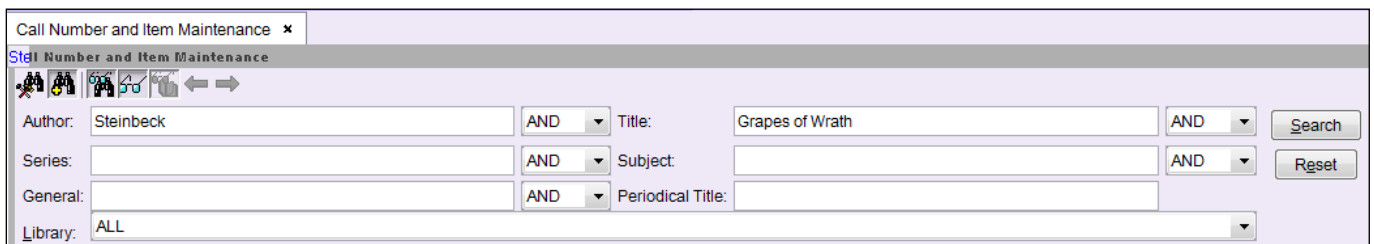
The screenshot shows a search interface titled "Call Number and Item Maintenance". It features several input fields for search criteria: Author, Series, General, and Library. The Title field contains "Grapes of Wrath". There are "AND" dropdown menus between the fields and "Search" and "Reset" buttons on the right. The Library dropdown is set to "ALL".

Title and Author

Perform a title and author search from the keyword search screen.

The author's last name is usually sufficient to enter in the author field in order for WorkFlows to find a matching record. For example, to find a work by John Steinbeck, simply enter "Steinbeck" (without quotes) into the author search field.

Initial articles should be omitted when the title is entered into the search field. For example, to search for *The Grapes of Wrath*, enter *Grapes of Wrath*.



The screenshot shows the same search interface as above, but with the Author field filled with "Steinbeck". The Title field remains "Grapes of Wrath". The "Search" and "Reset" buttons are visible on the right.

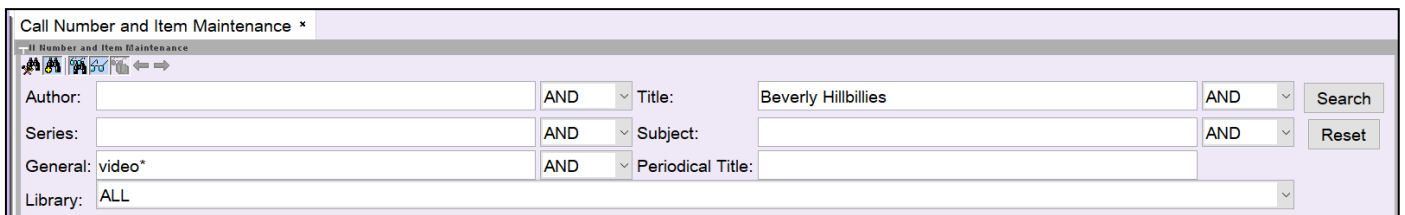
Title and Video Format Option #1: Video*

Option #1: Perform a title and video format search from the keyword search screen.

Initial articles (a, an, the) should be omitted when the title is entered into the search field. For example, to search for *The Beverly Hillbillies*, enter *Beverly Hillbillies*.

The video format is entered into the general search field as video*

Searching by video* will retrieve records that describe all video formats, including videocassette tape, DVD, and Blu-ray.



Call Number and Item Maintenance *
Call Number and Item Maintenance

Author: AND Title: AND Search

Series: AND Subject: AND Reset

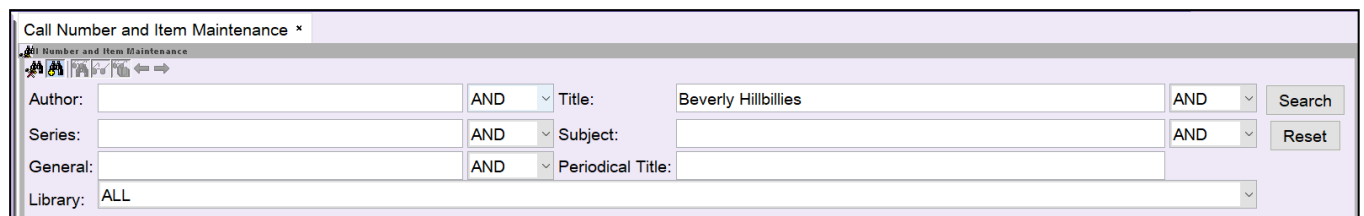
General: AND Periodical Title:

Library:

Title and Video Format Option #2: MOVIE Item Category 3

1. Initial articles (a, an, the) should be omitted when the title is entered into the search field.

For example, to search for *The Beverly Hillbillies*, enter *Beverly Hillbillies*.



Call Number and Item Maintenance *
Call Number and Item Maintenance

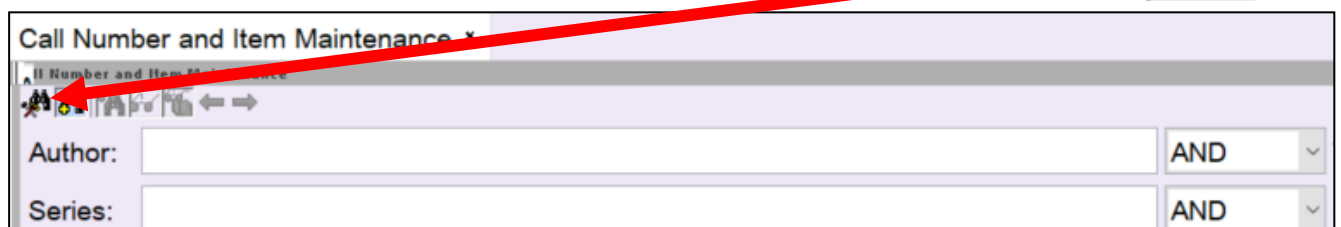
Author: AND Title: AND Search

Series: AND Subject: AND Reset

General: AND Periodical Title:

Library:

2. Click on the first helper that is black binoculars with a red X.



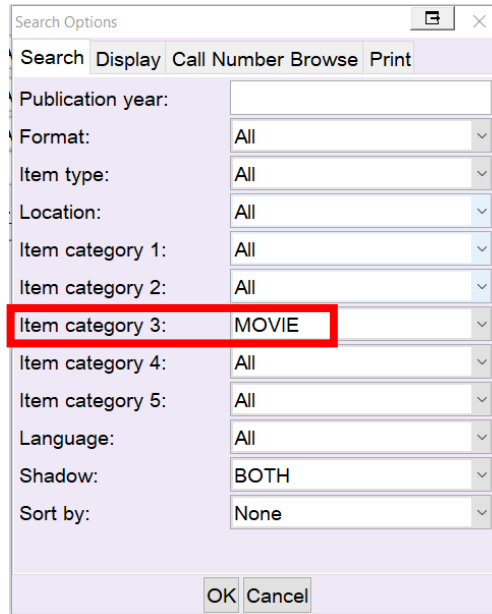
Call Number and Item Maintenance *
Call Number and Item Maintenance

Author: AND

Series: AND

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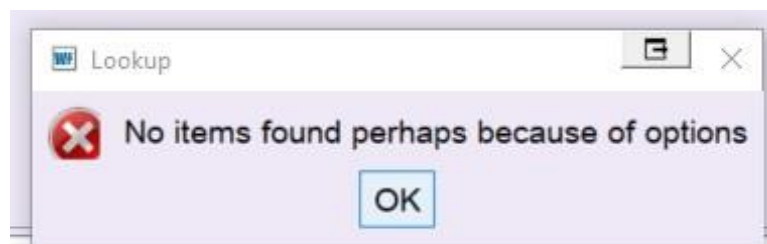
- From search options box, use the drop-down menu to select the MOVIE item category 3 code.



The image shows a 'Search Options' dialog box with several fields and dropdown menus. The fields are: Publication year (text input), Format (dropdown), Item type (dropdown), Location (dropdown), Item category 1 (dropdown), Item category 2 (dropdown), Item category 3 (dropdown, highlighted with a red box and set to 'MOVIE'), Item category 4 (dropdown), Item category 5 (dropdown), Language (dropdown), Shadow (dropdown), and Sort by (dropdown). At the bottom are 'OK' and 'Cancel' buttons.

- Once you select the MOVIE item category 3, click OK to close the search options box.
- Hit <Enter> on your keyboard or click <Search> in WorkFlows. The movie title will be listed in the search results if an RSA library owns it.
- When you are done searching for movies, completely shut Call Number and Item Maintenance by clicking <Close>. Re-open it and enter your next search.

If you do not completely shut Call Number and Item Maintenance and re-open it, you will see the error below when you enter a new search by author, title, etc., if none of the items in your search are assigned the MOVIE item category 3.



Rather than seeing this error, the search results may be incomplete if some of the items for which you are searching are assigned the MOVIE item category 3. The results are misleading because only that subset of the collection is being searched – not the whole collection.

Title and Sound Format Option #1: Sound* or Audio*

Perform a title and sound format search from the keyword search screen.

Initial articles (a, an, the) should be omitted when the title is entered into the search field. For example, to search for *The Lincoln Lawyer*, enter *Lincoln Lawyer*.

The sound format can be entered into the general search field as either sound* or audio* because both terms are used on bibliographic records that describe musical and spoken word (i.e., audiobooks).

Searching by either sound* or audio* will likely retrieve video bibliographic records because those records often contain the word “sound” in their physical description.

Call Number and Item Maintenance *
Call Number and Item Maintenance

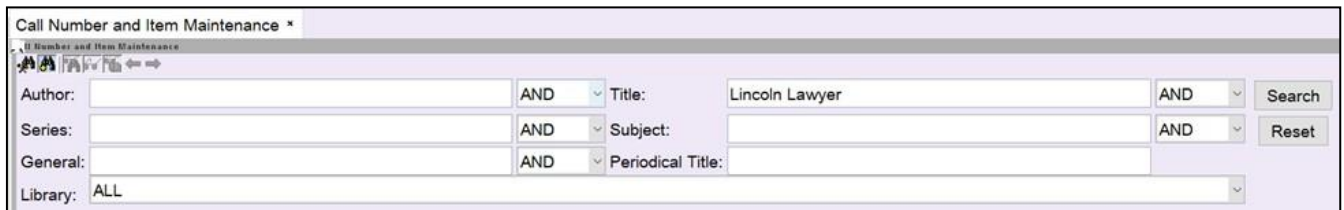
Author: AND Title: Lincoln Lawyer AND Search
Series: AND Subject: AND Reset
General: audio* AND Periodical Title:
Library: ALL

Call Number and Item Maintenance *
Call Number and Item Maintenance

Author: AND Title: Lincoln Lawyer AND Search
Series: AND Subject: AND Reset
General: sound* AND Periodical Title:
Library: ALL

Title and Sound Format Option #2: AUDIOBOOK or MUSIC Item Category 3

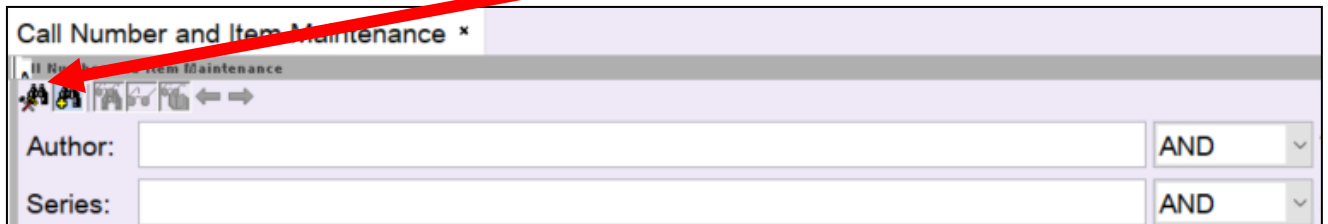
1. Initial articles (a, an, the) should be omitted when the title is entered into the search field. For example, to search for *The Lincoln Lawyer*, enter *Lincoln Lawyer*.



Call Number and Item Maintenance *
H Number and Item Maintenance

Author: AND Title: Lincoln Lawyer AND Search
Series: AND Subject: AND Reset
General: AND Periodical Title:
Library: ALL

2. Click on the first helper that is black binoculars with a red X.

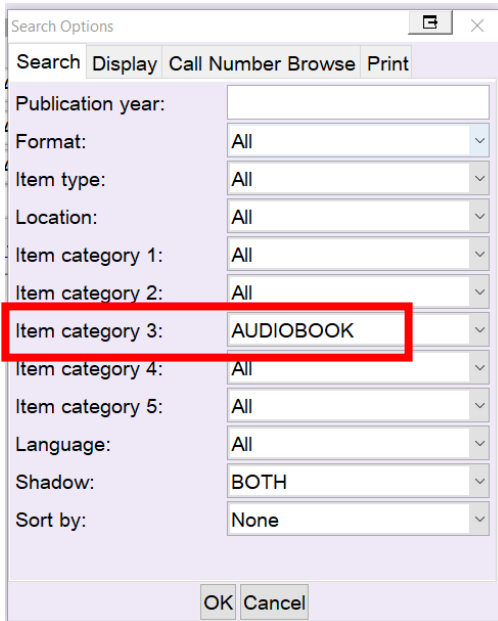


Call Number and Item Maintenance *
H Number and Item Maintenance

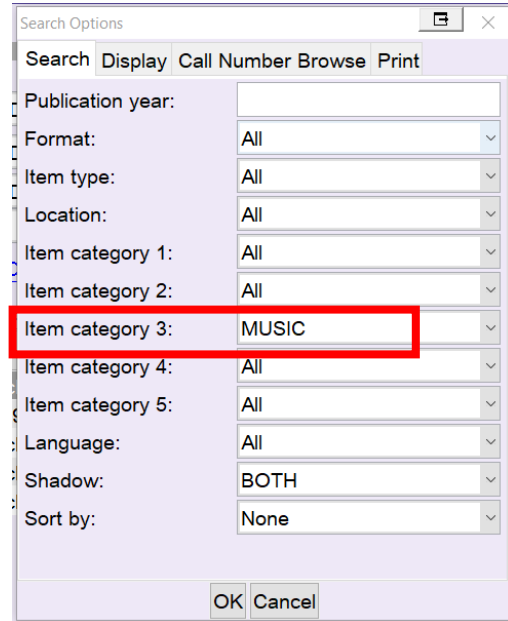
Author: AND
Series: AND

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- From search options box, use the drop-down menu to select one of the following item category 3 codes depending on your search:
 - If you are searching for spoken word (i.e., audiobooks), select the AUDIOBOOKS item category 3.
 - or*
 - If you are searching for musical recordings, select the MUSIC item category 3.



The screenshot shows the 'Search Options' dialog box. The 'Item category 3' dropdown menu is highlighted with a red box and contains the text 'AUDIOBOOK'. Other fields include 'Publication year', 'Format: All', 'Item type: All', 'Location: All', 'Item category 1: All', 'Item category 2: All', 'Item category 4: All', 'Item category 5: All', 'Language: All', 'Shadow: BOTH', and 'Sort by: None'. Buttons for 'OK' and 'Cancel' are at the bottom.

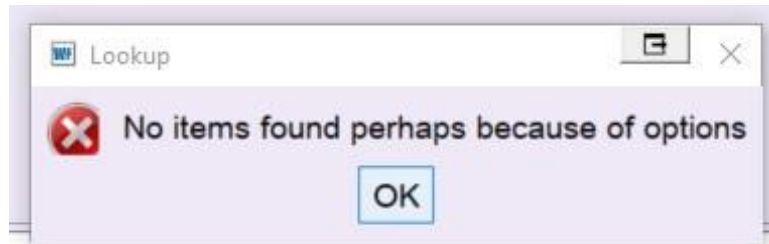


The screenshot shows the 'Search Options' dialog box. The 'Item category 3' dropdown menu is highlighted with a red box and contains the text 'MUSIC'. Other fields include 'Publication year', 'Format: All', 'Item type: All', 'Location: All', 'Item category 1: All', 'Item category 2: All', 'Item category 4: All', 'Item category 5: All', 'Language: All', 'Shadow: BOTH', and 'Sort by: None'. Buttons for 'OK' and 'Cancel' are at the bottom.

- Once you select the AUDIOBOOK or MUSIC item category 3, click OK to close the search options box.
- Hit <Enter> on your keyboard or click <Search> in WorkFlows. The title of the sound recording will be listed in the search results if an RSA library owns it.
- When you are done searching for sound recordings, completely shut Call Number and Item Maintenance by clicking <Close>. Re-open it and enter your next search.

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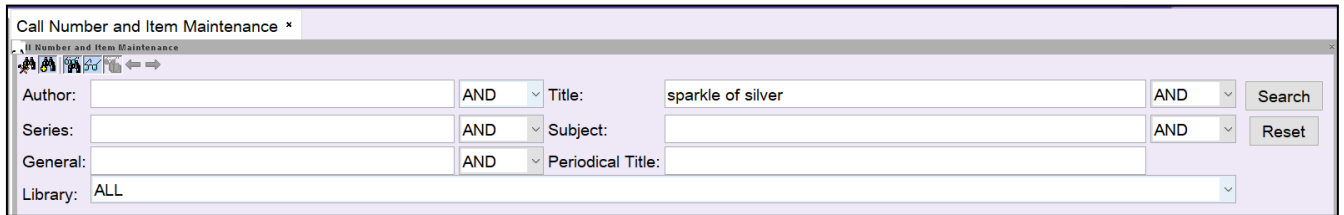
If you do not completely shut Call Number and Item Maintenance and re-open it, you will see the error below when you enter a new search by author, title, etc., if none of the items in your search are assigned the AUDIOBOOK or MUSIC item category 3.



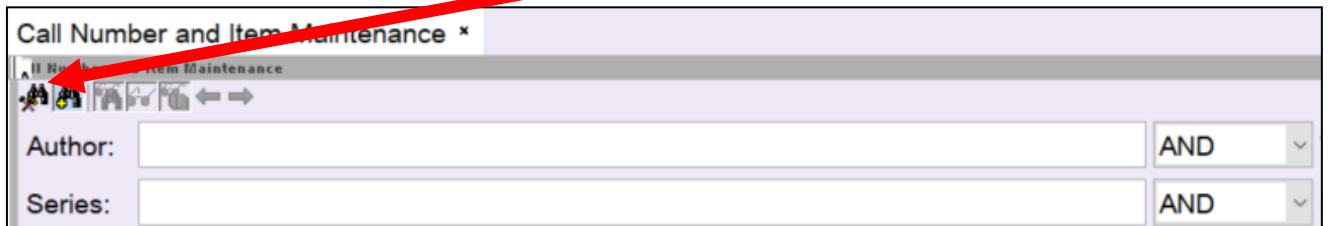
Rather than seeing this error, the search results may be incomplete if some of the items for which you are searching are assigned the AUDIOBOOK or MUSIC item category 3. The results are misleading because only that subset of the collection is being searched – not the whole collection.

Title and Large Print

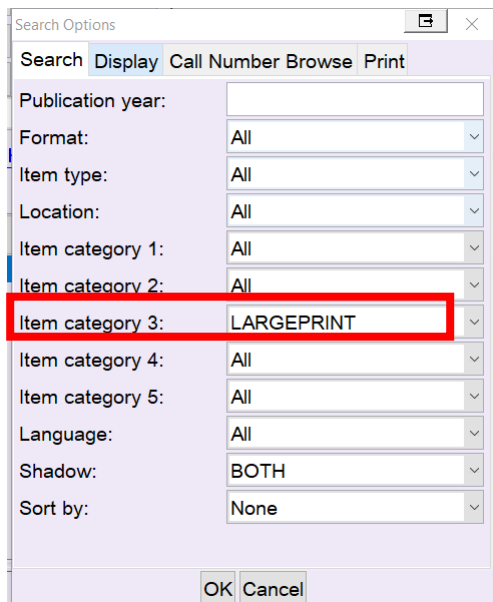
1. Initial articles (a, an, the) should be omitted when the title is entered into the search field. For example, to search for *A Sparkle of Silver*, enter *Sparkle of Silver*.



2. Click on the first helper that is black binoculars with a red X.



3. From search options box, use the drop-down menu to select the LARGEPRINT item category 3 code.



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4. Once you select the LARGEPRINT item category 3, click OK to close the search options box.
5. Hit <Enter> on your keyboard or click <Search> in WorkFlows. The large print title will be listed in the search results if an RSA library owns it.
6. When you are done searching for large print, completely shut Call Number and Item Maintenance by clicking <Close>. Re-open it and enter your next search.

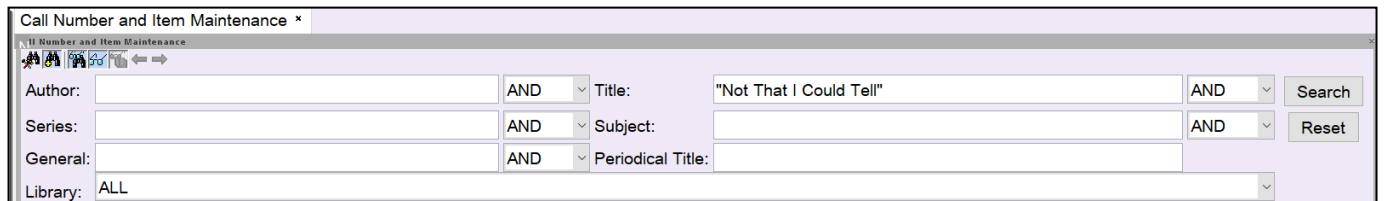
If you do not completely shut Call Number and Item Maintenance and re-open it, you will see the error below when you enter a new search by author, title, etc., if none of the items in your search are assigned the LARGEPRINT item category 3.



Rather than seeing this error, the search results may be incomplete if some of the items for which you are searching are assigned the LARGEPRINT item category 3. The results are misleading because only that subset of the collection is being searched – not the whole collection.

Title Contains “Not”

If a title contains the word “not,” type the title surrounded by quotation marks and then search. The quotation marks will avoid WorkFlows interpreting “not” as a Boolean search limiter.

A screenshot of the "Call Number and Item Maintenance" search interface. The interface has a title bar "Call Number and Item Maintenance *". Below the title bar is a toolbar with icons for search, refresh, and other functions. The main area contains several search fields: "Author:", "Series:", "General:", and "Library: ALL". To the right of these fields are "AND" dropdown menus. The "Title:" field contains the text ""Not That I Could Tell"". To the right of the "Title:" field is another "AND" dropdown menu. At the bottom right of the search area are "Search" and "Reset" buttons.

Title and Publisher

Perform a title and publisher search from the keyword search screen.

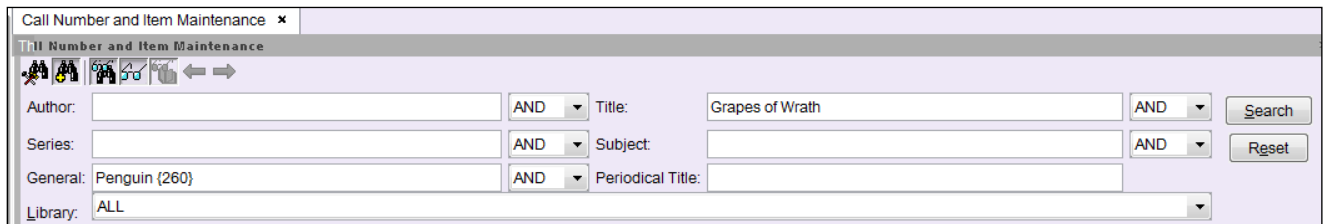
Initial articles should be omitted when the title is entered into the search field. For example, to search for *The Grapes of Wrath*, enter *Grapes of Wrath*.

The name of your item's publisher, as it appears on your item's title page or title page verso, can be entered into the General search box, followed by a single space, then either {260} or {264}.

The publisher appears in either the 260 or the 264 field depending on whether the record follows the AACR2 or RDA cataloging rules. The publisher will be in the 260 field on AACR2 records and in the 264 field on RDA records.

RSA recommends trying the {264} plus title search first. If you are unable to find a record that matches your item, try the {260} plus title search.

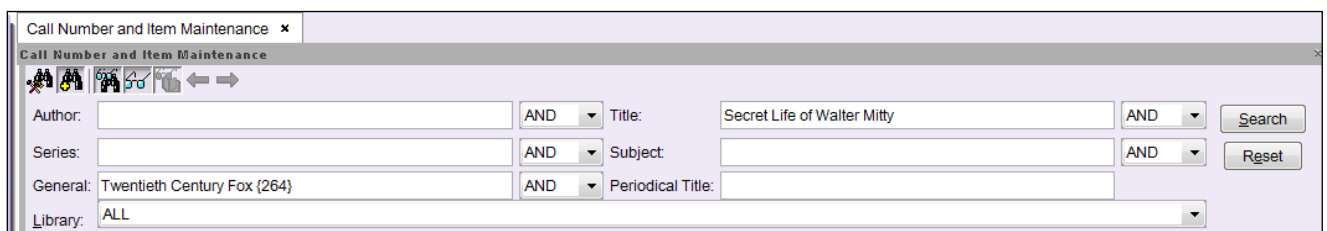
Title and publisher search with the 260 field:



The screenshot shows a search interface titled "Call Number and Item Maintenance". The search criteria are as follows:

Author:		AND	Title:	Grapes of Wrath	AND	Search
Series:		AND	Subject:		AND	Reset
General:	Penguin {260}	AND	Periodical Title:			
Library:	ALL					

Title and publisher search with the 264 field:



The screenshot shows a search interface titled "Call Number and Item Maintenance". The search criteria are as follows:

Author:		AND	Title:	Secret Life of Walter Mitty	AND	Search
Series:		AND	Subject:		AND	Reset
General:	Twentieth Century Fox {264}	AND	Periodical Title:			
Library:	ALL					

Universal Product Code (UPC)

The UPC is the 12-digit number near the barcode on the back of the item. A UPC is entered into the General search box with no hyphens or spaces.

XX Auto-Generated Call Numbers

Search your library’s collection to find items assigned auto-generated call numbers that begin with XX, followed by a variable number of digits in parentheses. Items with XX call numbers may be entered for interlibrary loan items received from libraries outside RSA and for other items that are temporary to your collection, such as rental or rotating collections. XX call numbers should not be assigned to items that are permanent to your collection. XX call numbers will result in a confusing RSACat display for users and will not appear correctly on call number reports of your collection, such as shelf lists.

To find XX call numbers in your collection, type “XX” (without quotes) into the search field on the advanced screen, select call number as the index, pick your library, and click the browse option under Type.

Call number	Title	Copies
WYM	Blue heaven : a novel / Willard Wyman.	1
XX(1113153.14)	Looking for salvation at the Dairy Queen : a novel / Susan ...	1
XX(1115785.43)	The winding ways quilt : an Elm Creek quilts novel / Jennif...	1
XX(1116401.34)	Secrets / Jude Deveraux.	1
XX(1117136.5)	Virgin River : a Barnaby Skye novel / Richard S. Wheeler.	1

Scroll down in the result list to see items currently assigned XX call numbers in your collection. If any call numbers are assigned to items permanent to your collection, click the Modify button at the bottom of the screen to open the record. Go to the Call Number/Item tab if it does not open by default, correct the call number, and save your change.