Cataloging at-a-Glance Cheat Sheet 2025

Last updated: April 4, 2025

<u>Questions about cataloging?</u>
Please contact the RSA Help Desk at help@rsanfp.org or 1-866-940-4083.

<u>RSA Cataloging Site Visits:</u>
A cataloging site visit is the perfect opportunity for library and RSA staff to connect, discuss helpful cataloging topics, and answer any cataloging-related questions. Site visits may be conducted in-person or virtually, whichever works best for your library.

Request a cataloging site visit: https://form.jotform.com/RSAnfp/RSAsite-visit-request

<u>WorkFlows Cataloger Accounts:</u>
- Keep help@rsanfp.org informed as new cataloging staff begin to work at your library, and as existing cataloging staff depart or retire.
- RSA removes no longer needed cataloger accounts from WorkFlows.
- When you email the RSA Help Desk to request a new cataloger account, share this information about the new cataloger:
  - first and last name
  - email address they check while working at the library
  - your preferred configuration level for their account (basic with brief records, basic without brief records, OCLC cataloging, item group editor)

<u>WorkFlows "How To" Refreshers:</u>
- How to set up the WorkFlows Cataloging module:
  https://support.librariesofrsa.org/project/workflows-cataloging-set-up-guide/
- How to match an OCLC record to a book:
  https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-book/
- How to match an OCLC record to a video or sound recording:
  https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-video-or-sound-recording/
- How to catalog a call number (brand new title):
  https://support.librariesofrsa.org/project/add-a-call-number-brand-new-item/

- How to create a brief record if there is no matching record already in WorkFlows or OCLC (if your library uses OCLC):
  https://support.librariesofrsa.org/project/create-a-brief-record/
- How to delete an item:
  https://support.librariesofrsa.org/project/deleting-items-from-workflows/
- How to discard an item:
- https://support.librariesofrsa.org/project/workflows-discard-user/
- How to use the Global Item Modification wizard to change multiple items at once:
  https://support.librariesofrsa.org/project/global-item-modification-wizard/

Additional Cataloging Services:

If you have local history, genealogy, or special collections in need of cataloging, contact:

Dr. Pamela Thomas, Cataloging Maintenance Center

(618) 467-8649

cmc@illinoisheartland.org

https://www.illinoisheartland.org/services/cmc

If you have non-English language items in need of cataloging, contact:

Nincy George, RAILS Cataloging Services

(630) 734-5128

nincy.george@railslibraries.org

https://railslibraries.org/catalogs/cataloging-services

Basic WorkFlows Cataloging Workshops:

Objectives:

- Receive an individually named account to catalog at the basic level in the WorkFlows database (if the registrant is not already using an individual account).
- Through hands-on practice, learn how to use WorkFlows to catalog items in a variety of formats.
- Create brief records for items that lack matching bibliographic records already in WorkFlows.
- Discover how to perform global item edits and use the discard account.
- Find out how RSA, RAILS, and the Cataloging Maintenance Center provide original cataloging assistance.
- Review reports that identify cataloging issues in need of correction to ensure a quality database and optimal discoverability for users.

Tuesday, April 29   12:00 – 4:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-04-29/rsa-online-basic-workflows-cataloging-workshop

Tuesday, May 27   9:00 am – 1:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-05-27/rsa-online-basic-workflows-cataloging-workshop

Tuesday, June 17   10:00 am – 2:00 pm   In-person at Edwards River PLD
Registration: https://librarylearning.org/event/2025-06-17/rsa-person-basic-workflows-cataloging-workshop

Tuesday, July 15   12:00 – 4:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-07-15/rsa-online-basic-workflows-cataloging-workshop

Thursday, August 7   9:00 am – 1:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-08-07/rsa-online-basic-workflows-cataloging-workshop

Tuesday, September 9   10:00 am – 2:00 pm   In-person at Clover PLD
Registration: https://librarylearning.org/event/2025-09-09/rsa-person-basic-workflows-cataloging-workshop

Friday, October 24   12:00 – 4:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-10-24/rsa-online-basic-workflows-cataloging-workshop

Wednesday, November 19   9:00 am – 1:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-11-19/rsa-online-basic-workflows-cataloging-workshop

Tuesday, December 16   10:30 am – 2:30 pm   In-person at Fondulac DL
Registration: https://librarylearning.org/event/2025-12-16/rsa-person-basic-workflows-cataloging-workshop

RSA Bibload Workshops:
This workshop will focus on how to use OCLC Connexion Client to make bibliographic records usable for RSA, including how to add library-specific call number/item information to the records, export them from the Client in the correct format, and load them into WorkFlows so they are visible in the RSAcat.

Friday, April 25   10:00 am – 12:30 pm   In-person at Dunlap PLD
Registration: https://librarylearning.org/event/2025-04-25/rsa-person-bibload-workshop

Thursday, June 26   9:30 am – 12:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-06-26/rsa-bibload-workshop

Friday, August 22   1:00 – 3:30 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-08-22/rsa-bibload-workshop

Thursday, October 23   1:30 – 4:00 pm   In-person at Odell PLD
Registration: https://librarylearning.org/event/2025-10-23/rsa-person-bibload-workshop

Tuesday, December 9   9:30 am – 12:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-12-09/rsa-bibload-workshop

WorkFlows Item Group Editor Training:
The Item Group Editor allows you to search for a group of items in your collection and then make changes to all of those items in a single batch. Examples of values that can be changed using the Item Group Editor include (but are not limited to) home location, price, item type, and item cats 1-5.

Examples of batch changes in the Item Group Editor:
- Does your library have quite a few books or DVDs assigned a "new" home location code (e.g., NEW-BOOK, NEW-DVD) that are no longer new and need to be assigned the home location your library uses for its non-new materials?
- Has your library assigned the item category 1 code UNDEFINED to many of its materials, and UNDEFINED needs to be changed to FICTION, NONFICTION, or EQUIPMENT?
- Has your library assigned the item category 2 code UNDEFINED, which needs to be edited to the appropriate reading level (adult, young adult, or juvenile)?

Item Group Editor training is hosted in-person at your library, taking up to 2 ½ hours to complete. Please reach out to help@rsanfp.org if you are interested in scheduling this training for your library. Item Group Editor training requests are accepted on a first-come, first-served basis.

RSA Cataloging Chats:
Cataloging and other interested staff are invited to attend an RSA Cataloging Chat to learn what's new with the Cataloging Maintenance Center, RAILS Cataloging Services, and the RSA Cataloging Department.

Thursday, May 29   10:00 am – 12:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-05-29/rsa-cataloging-chat

Friday, September 26   10:00 am – 12:00 pm   Online in Zoom
Registration: https://librarylearning.org/event/2025-09-26/rsa-cataloging-chat