

### **Creating a Brief Record Guide**

Last updated: August 18, 2025

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: https://www.youtube.com/watch?v=3bSrER2obdY.
- 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: <a href="https://www.youtube.com/watch?v=4dCmpA7nz\_Q">https://www.youtube.com/watch?v=4dCmpA7nz\_Q</a>.
- 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="mailto: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.

Exampl	es:
LODAL	

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

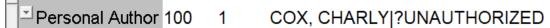
d. Author (100): Enter the author's name in ALL CAPS in the LASTNAME, FIRSTNAME format.

### 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:

• Example for a title that begins with "A" and does *not* have 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="https://help@rsanfp.org">help@rsanfp.org</a>.

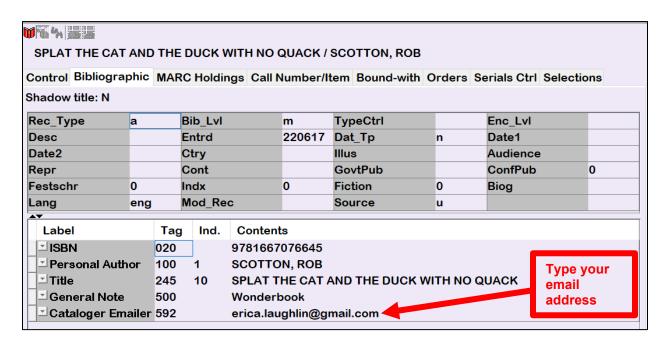
# Resource Sharing Alliance

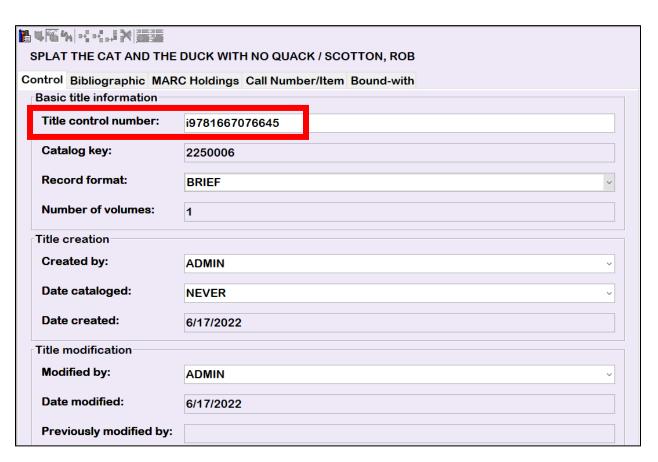
# **Appendix: Example Brief Records**

# Contents

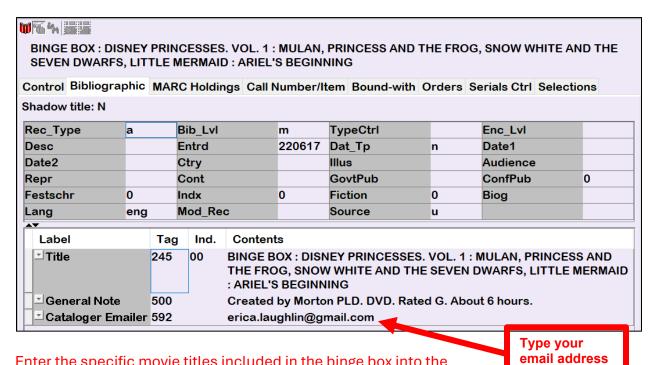
Audio-Enabled Book (Wonderbook, Vox)	8
Binge Box	g
Blu-ray	10
Blu-ray Only from Blu-ray + DVD Combo Pack	11
Book	12
Book on CD	13
Book with an Illustrator	14
Book with Library Binding ISBN	15
Book with Multiple Authors	16
Book without an Author	17
Cake Pan	18
DVD	19
DVD Only from Blu-ray + DVD Combo Pack	20
Game	21
Item without an ISBN	22
Item without an ISSN	23
Item without a UPC	24
Kit	25
Laptop Computer	26
Large Print Book	27
Magazine	28
Mobile Hotspot	29
Music CD	30
Playaway	31
Puzzle	32
Streaming Media Player	33
Video Game	34

### Audio-Enabled Book (Wonderbook, Vox)

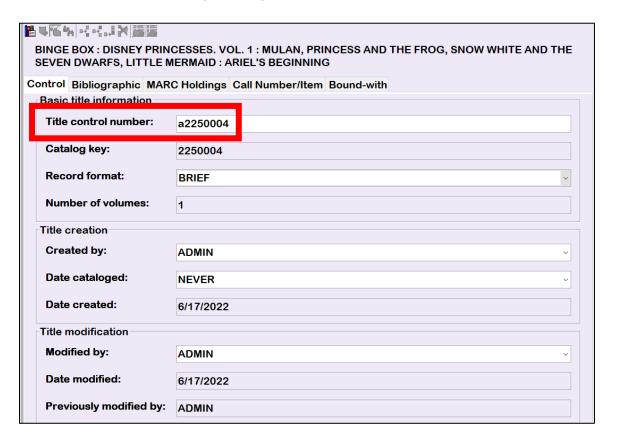




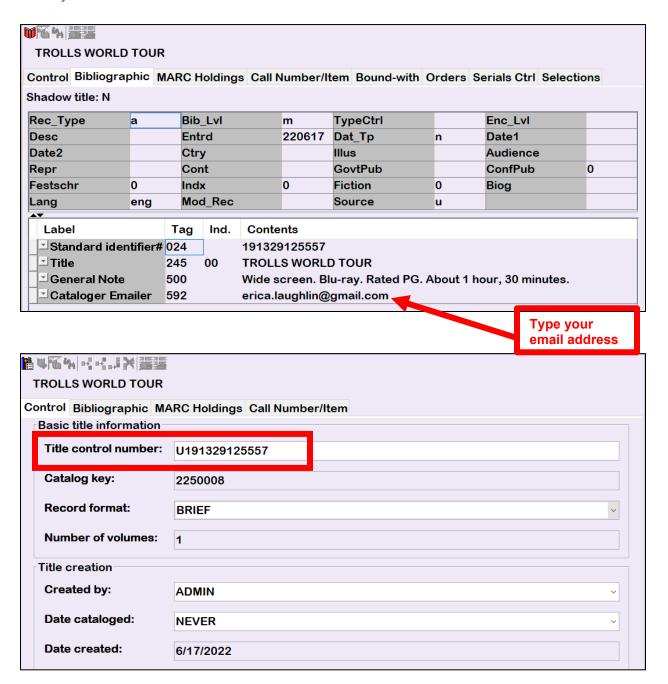
#### Binge Box



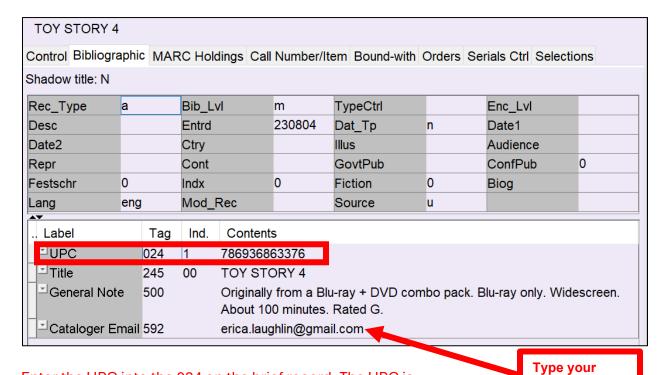
Enter the specific movie titles included in the binge box into the 245 field after the name of the overall binge box. Entering the titles in the 245 field ensures they are fully searchable in WorkFlows and the RSAcat.



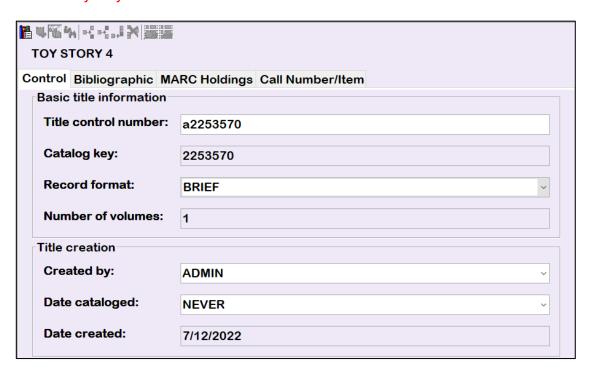
### Blu-ray



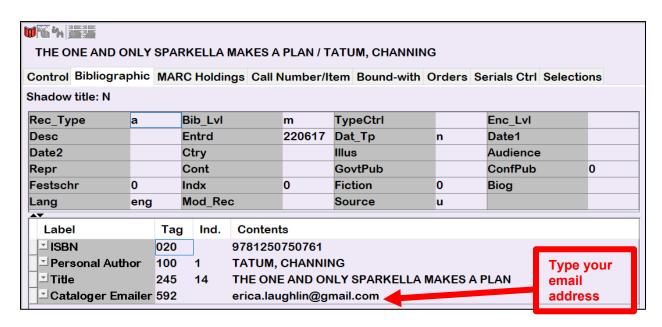
#### Blu-ray Only from Blu-ray + DVD Combo Pack



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.

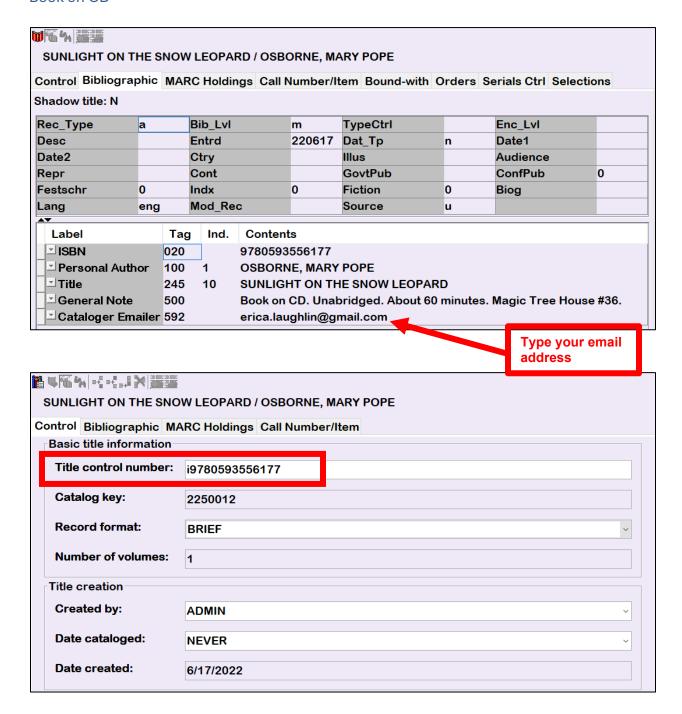


#### Book

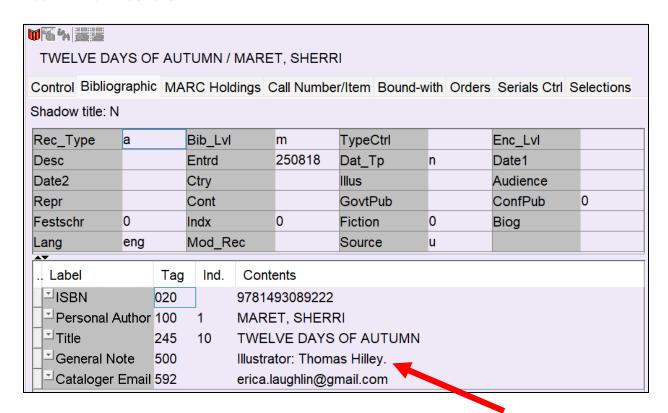




#### Book on CD



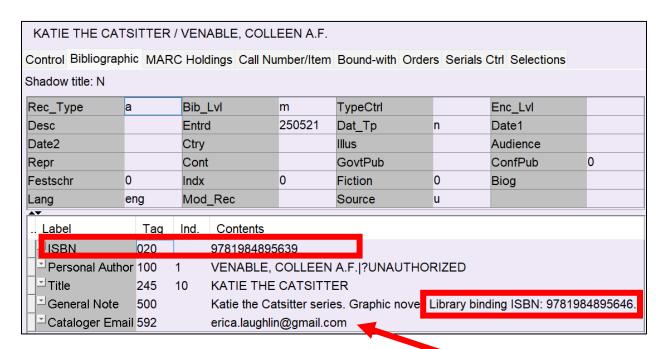
#### Book with an Illustrator



If there is an illustrator for the book that you feel would be helpful for patrons to know, enter the illustrator's name in the 500 field. No need to use all caps. Entering the illustrator's name is optional.



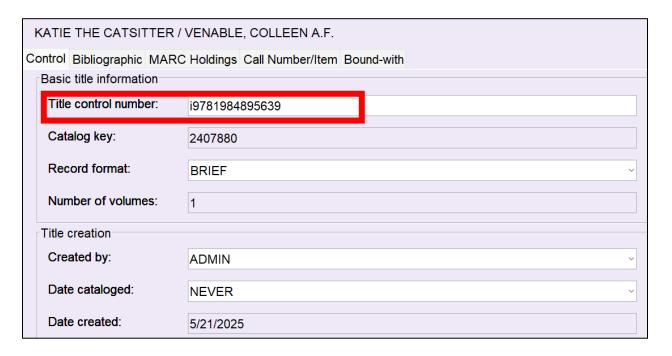
### **Book with Library Binding ISBN**



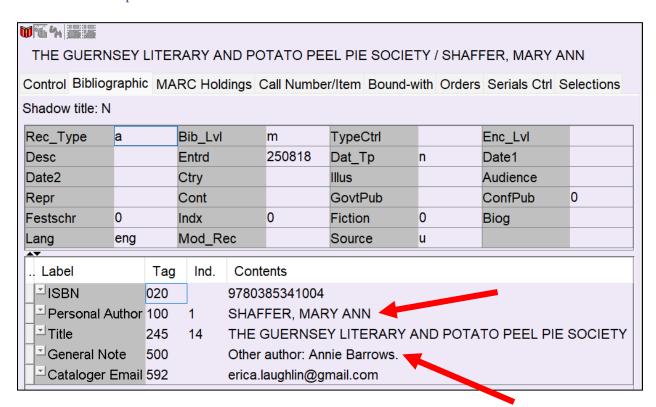
Enter the ISBN for the paperback version of the book into the 020 and title control number fields on the brief record. The paperback ISBN is found on the book's title page verso.

Type your email address

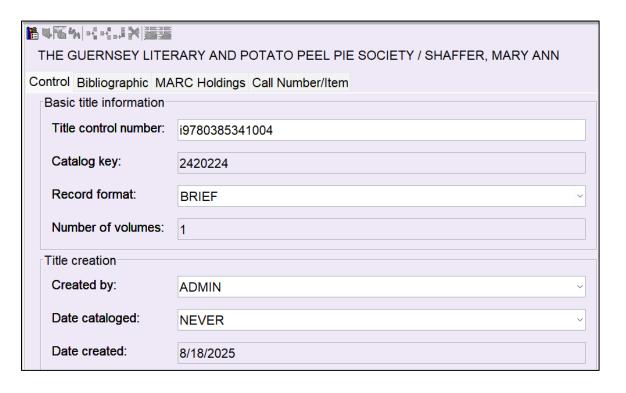
If there is no paperback ISBN, use the hardcover ISBN in the 020 and title control number fields. Enter the library binding ISBN in the 500 field. The library binding ISBN is often found on the book's back cover.



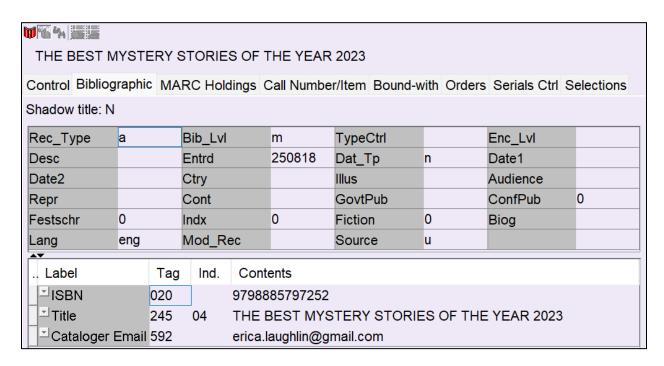
### **Book with Multiple Authors**



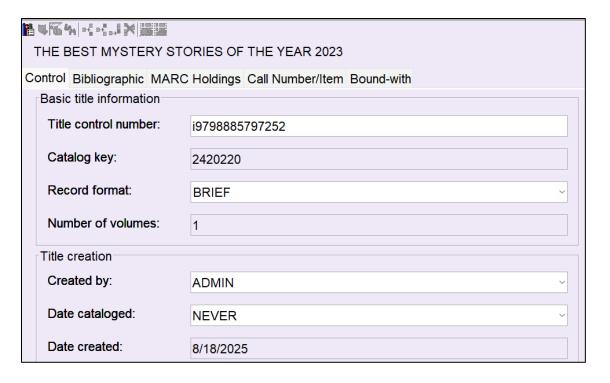
If there are multiple authors for the book, enter in the 100 field the author that appears first on the book's title page. Use the LAST NAME, FIRST NAME format in all caps. Enter the names of the other authors in the 500 field. No need to use all caps.



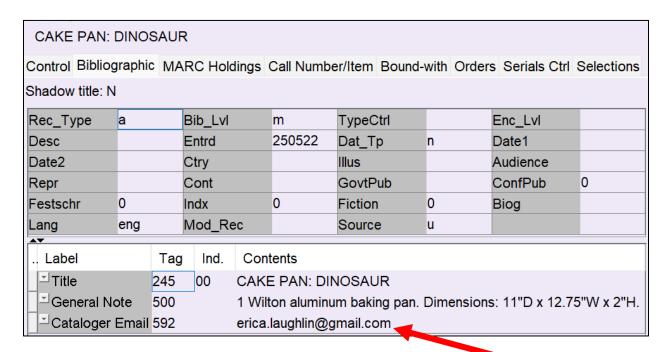
#### Book without an Author



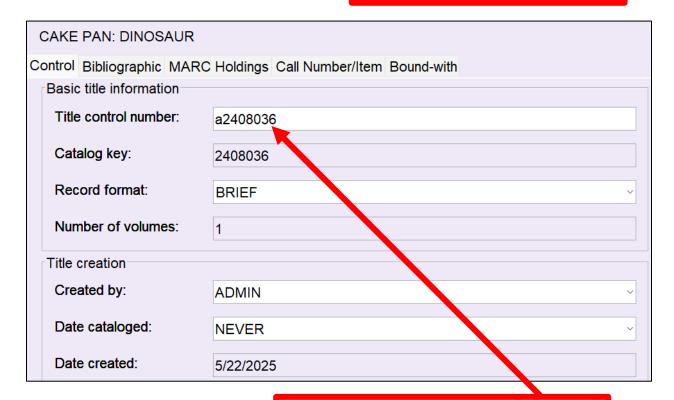
If there is no author for the book, leave the 100 field blank when creating the brief record. WorkFlows will automatically remove the 100 field when the brief record is saved.



#### Cake Pan

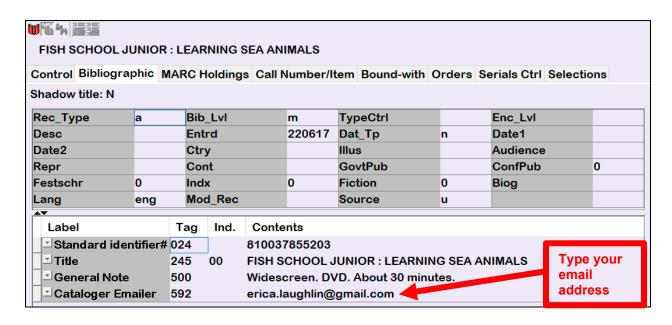


Type your email address or "leave as brief" if the brief record should not be upgraded to an OCLC record.



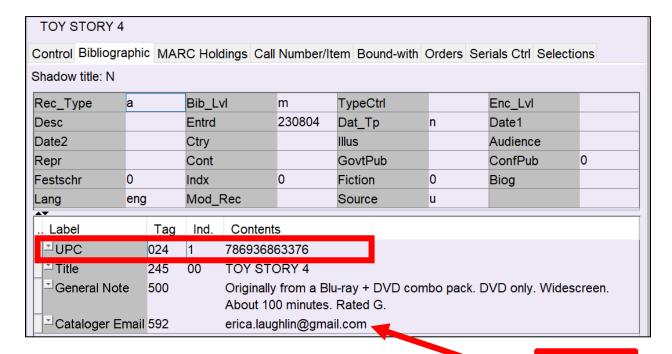
Leave the auto-generated title control number beginning with "a" on the Control tab as-is

#### DVD





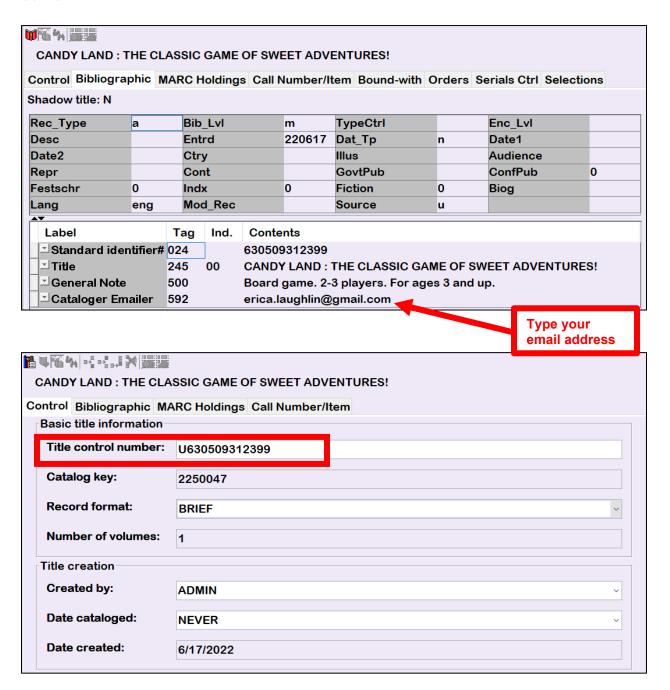
#### DVD Only from Blu-ray + DVD Combo Pack



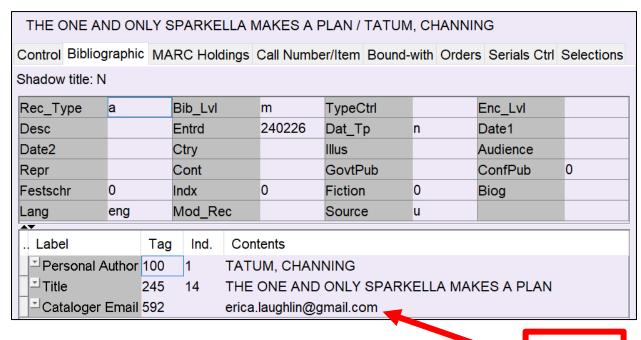
Enter the UPC into the 024 on the brief record. The UPC is usually found on the back of the container. Leave the autogenerated title control number beginning with "a" on the Control tab as-is. Entering the UPC in the title control number will cause the brief record to be replaced by the OCLC record that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



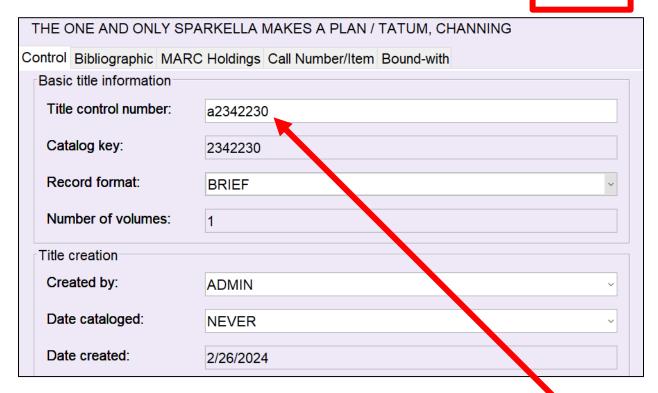
#### Game



#### Item without an ISBN

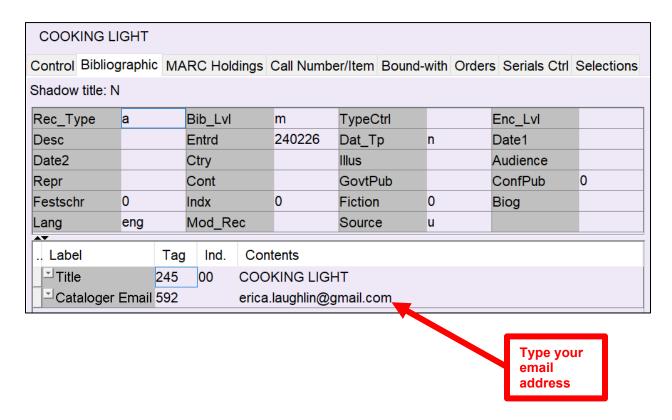


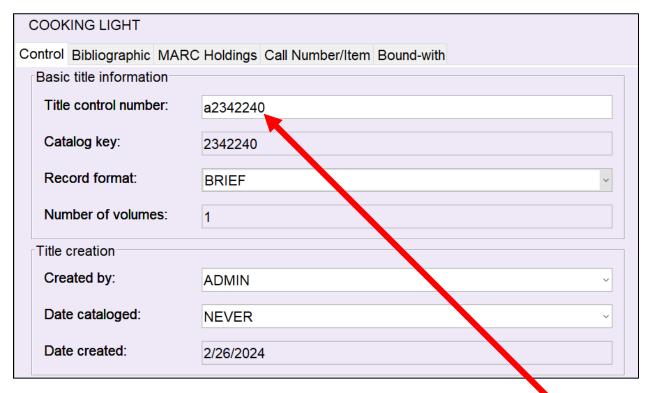
Type your email address



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

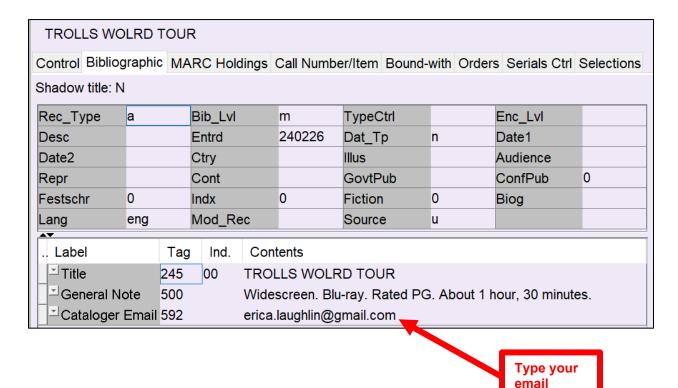
#### Item without an ISSN





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

#### Item without a UPC

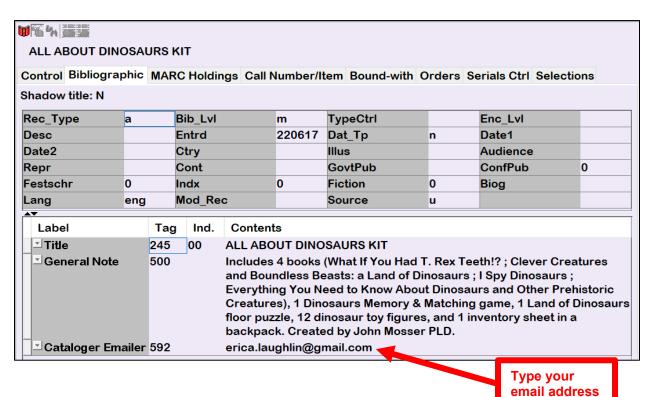


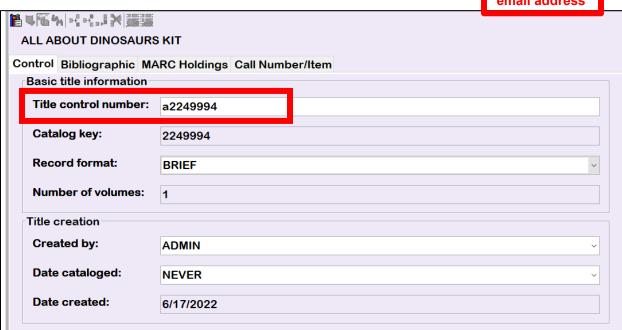
TROLLS WOLRD TOUR Control Bibliographic MARC Holdings Call Number/Item Basic title information Title control number: a2342232 Catalog key: 2342232 Record format: **BRIEF** Number of volumes: 1 Title creation Created by: ADMIN Date cataloged: **NEVER** Date created: 2/26/2024

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

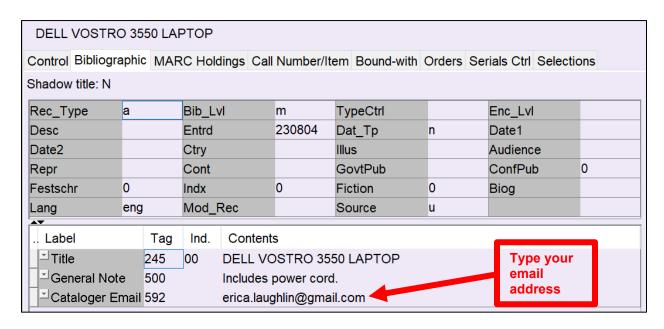
address

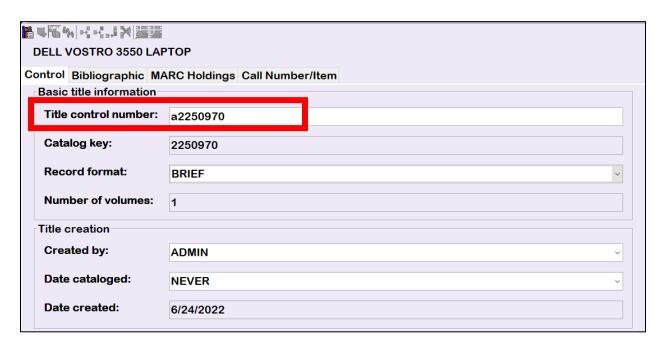
#### Kit



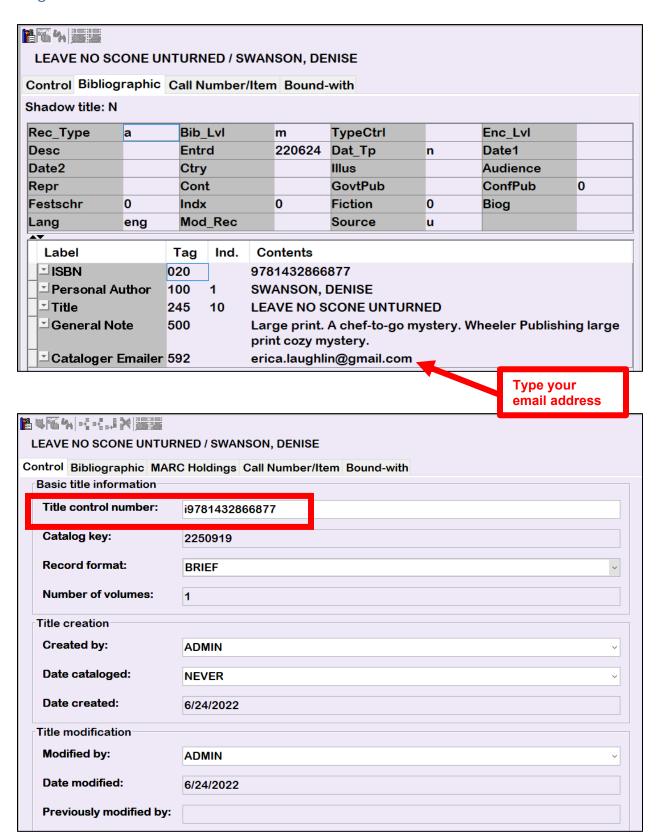


### **Laptop Computer**

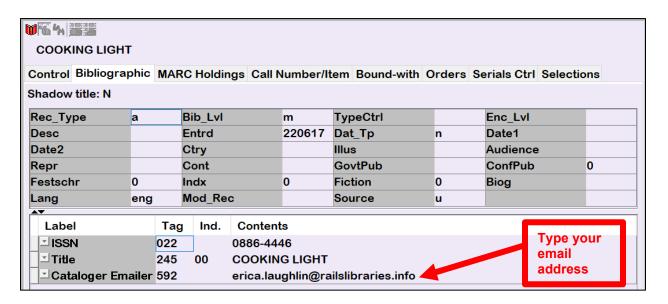




### Large Print Book

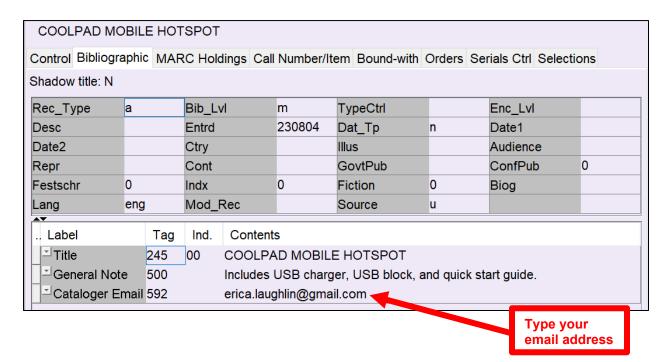


### Magazine



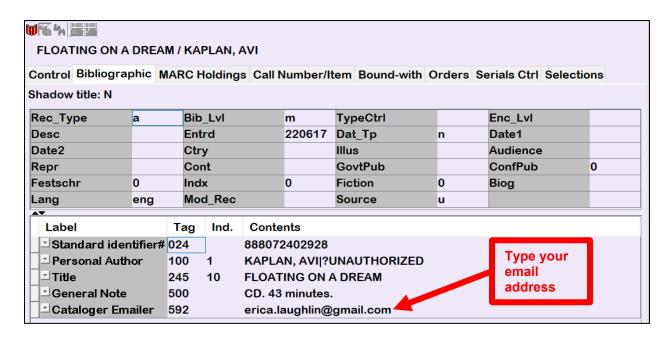


#### Mobile Hotspot



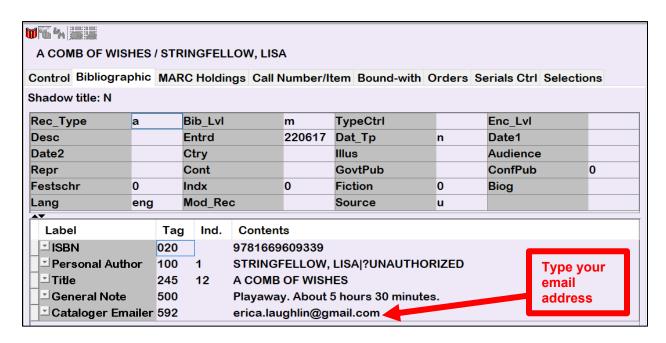


### Music CD



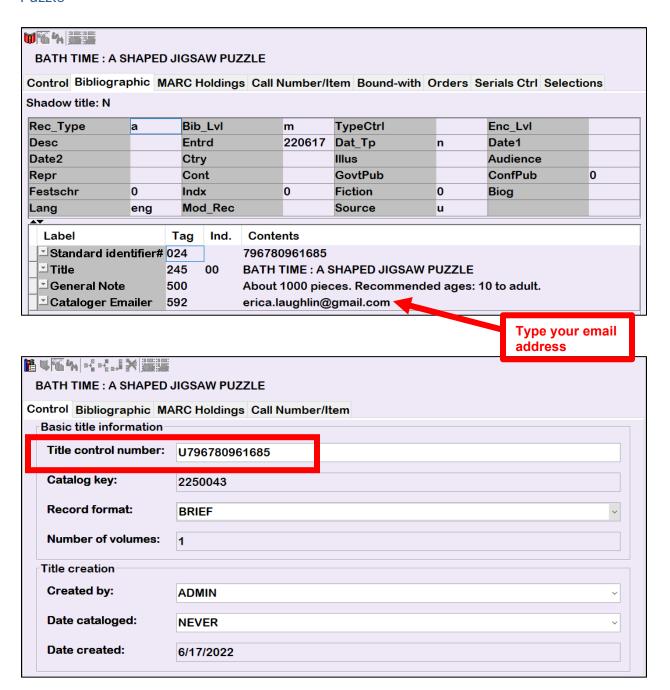


### Playaway

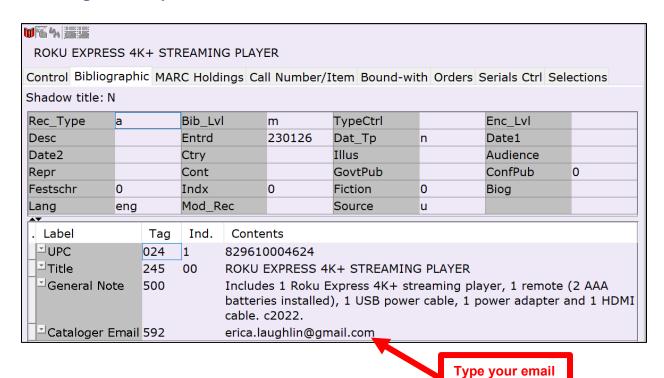


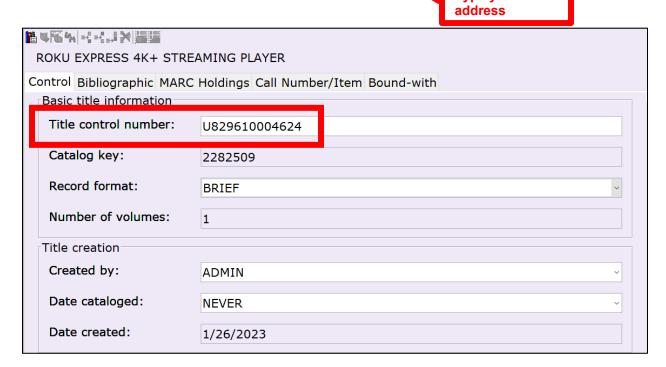


#### Puzzle



### Streaming Media Player





#### Video Game

