



Cataloging a Call Number (Brand New Title) on a Bibliographic Record in WorkFlows Procedure

Last updated: September 22, 2026

This procedure and accompanying video are posted at:

<https://support.librariesofrsa.org/project/add-a-call-number-brand-new-item/>.

Follow the instructions below for cataloging an item that is brand new to your library. A new item is called a “call number” in WorkFlows.

You will also follow these instructions when cataloging a new magazine issue in WorkFlows. For more information about cataloging magazines, refer to the guide and accompanying video posted here: <https://support.librariesofrsa.org/project/guidelines-for-cataloging-magazines-in-workflows/>.

To catalog a duplicate copy of an item your library already owns, refer to the Cataloging an Item (Duplicate Copy) on a Bibliographic Record in WorkFlows Procedure:

<https://support.librariesofrsa.org/project/add-an-item-duplicate-copy/>.

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

Steps for Cataloging a Brand New Title

1. Log into WorkFlows using your **individual cataloging account**.
2. Go to the **Cataloging module**.
3. Open the **Call Number and Item Maintenance wizard**.
4. **Search** for a bibliographic record that matches your item.
 - Search by ISBN, ISSN, or UPC first if one appears on your item.
 - The ISBN and UPC are entered in the General search box without hyphens or spaces.
 - The ISSN is entered in the General search box with the hyphen between the fourth and fifth digits.
 - If an ISBN, ISSN, or UPC search yields no matching results, try a title and author search.
 - Enter the author’s last name into the Author search box and the title (without “A,” “An,” or “The”) into the Title search box.

- More information about WorkFlows search strategies is available here:
<https://support.librariesofrsa.org/project/search-strategy-guide-for-the-workflows-call-number-and-item-maintenance-wizard/>.
5. If an ISBN, ISSN, UPC, or the title and author search yield no matching results, check OCLC for a matching record (if your library uses Connexion Client or Record Manager) or create a brief record for your item in WorkFlows. Refer to this guide for instructions how to create a brief record:
<https://support.librariesofrsa.org/project/create-a-brief-record/>.
 6. If your search in WorkFlows returns a potential matching record, open the bibliographic record by clicking the **Modify** button at the bottom of the screen.
 7. Check the **Bibliographic screen** to make sure the record matches your item. For a list of the fields to look at on the bibliographic record, refer to these cheat sheets:
 - Matching an OCLC record to your book:
<https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-book/>.
 - Matching an OCLC record to your video or sound recording:
<https://support.librariesofrsa.org/project/matching-an-oclc-record-to-your-video-or-sound-recording/>.
 - Matching a record to your magazine:
<https://support.librariesofrsa.org/project/matching-a-record-to-your-magazine/>.
 8. If the record does not match your item or if you are unsure, refer to this guide for instructions how to create a brief record:
<https://support.librariesofrsa.org/project/create-a-brief-record/>.
 9. If your item shares the same title and ISBN, ISSN, or UPC as an existing record in WorkFlows, either brief or OCLC, but that existing record is not a match for your item, do not catalog it in WorkFlows. Report the item to help@librariesofrsa.org. The RSA Bibliographic Services Department will ask you to send the item to 200-EP in RAILS delivery. RSA Bib Services will catalog your item on the correct OCLC record to avoid the item being transferred to the incorrect record during Brief Bot, RSA's ongoing automated brief record cleanup process. If Brief Bot has already run, and you notice your item is now cataloged on the wrong record, report it to the RSA Help Desk.
 10. If you are cataloging a DVD/Blu-ray combo pack, you want each disc cataloged on its own separate record, and there are no matching records in WorkFlows or OCLC (if your library uses OCLC), do not catalog the discs in WorkFlows. Report them to help@librariesofrsa.org. The RSA Bibliographic Services Department will ask you to send the discs to 200-EP in RAILS delivery. RSA Bib Services will catalog your discs

on the correct OCLC records to avoid them being transferred to the incorrect record during Brief Bot or overlaid with the wrong OCLC record. If Brief Bot has already run, and you notice the discs are now cataloged on the wrong record, report it to the RSA Help Desk.

11. If you confirm the record in WorkFlows matches your item, click on the tab at the top of the screen that is labeled **Call Number/Item**.

12. Click on the **Add Call Number** button at the bottom of the screen.

13. Make sure your library's WorkFlows code appears in the pop-up box and click OK.

If AG_ALS-PDC appears in the box instead of your library, refer to the "Cataloging Module: Call Number and Item Maintenance Wizard" section of the WorkFlows Cataloging Set-up Guide to configure your library as the default owning library:
<https://support.librariesofrsa.org/project/workflows-cataloging-set-up-guide/>

14. Starting at the top of the **Call Number/Item screen**, edit the information to reflect your item:

a. **Call number:** Enter the call number for the item.

- Thirty-two characters, including spaces, may be entered into the call number box.
- Enter the call number as it appears on the item's spine label.
- All letters entered in the call number field automatically appear as upper case.
- When an item from a multi-piece set will circulate on its own, RSA best practice is to use the bibliographic record that describes only that particular item (e.g., only volume 20), rather than the bibliographic record that describes the multi-piece set as a whole (e.g., the complete 20 volume set).

If you are entering a call number for an item that belongs to a multi-piece set, that item will circulate on its own, and you are using the bibliographic record that describes the set as a whole, enter |Z in the call number. The |Z allows a patron to select a particular item when placing a hold in RSACat, ensuring they receive the correct item to fill their hold. For instructions how to enter a multi-piece call number, refer to this cheat sheet:

<https://support.librariesofrsa.org/project/create-a-call-number-for-a-multi-piece-item/>.

- If you are unsure of a nonfiction call number for your item, prefer a call number from the following sources:
 1. Title page verso (if it is a print item).

2. 082 field on the WorkFlows bibliographic screen.
 3. Check the call number of another RSA library attached to the same bibliographic record, preferably a large public library.
 4. Browse your collection by subject to check the call numbers assigned to similar items.
 5. Still unsure of the call number? Contact the RSA Help Desk at help@librariesofrsa.org.
- Once you decide on a nonfiction call number for your item, browse your collection by that number to ensure similar subjects are shelved together, which will make them easier for patrons to find.
 1. Open the Call Number and Item Maintenance wizard.
 2. Click on the binoculars with the yellow plus sign in the upper left corner to go to the Advanced Search screen.
 3. In the “Search for” box, enter the call number for which you want to browse. For example: 031.
 4. For “Index,” select Call Number.
 5. For “Library,” choose your library’s WorkFlows code.
 6. Under “Type,” choose the radio button next to Browse.
 7. Click the Search button.
 8. You should see a list of call numbers assigned by your library that matches the number you entered. You will also see other call numbers your library has assigned that appear before and after that call number.
- b. **Class scheme:** DEWEY unless your library uses a different classification scheme for its call numbers, such as Library of Congress (LC) or National Library of Medicine (NLM).
- c. **Call library:** Your library’s WorkFlows code.
- d. **Shadow call number:** Ensure this box is unchecked.
- Place a check mark in this box only if you do not want the call number to be visible to patrons in the RSAcat.
 - Shadow call numbers sparingly.
 - Examples of when to shadow:
 - items kept in storage
 - outreach collections
 - items cataloged before their official release dates (excluding on-order items)
 - in-library use only
 - equipment
 - items shelved in a holds pickup locker
 - items that are not available for use during a library renovation, relocation, or other closures

- e. **Item ID:** Either type or scan the barcode number assigned to the item.
 - All RSA library barcodes, except those for the Quincy Public Library, begin with an uppercase A, followed by 11 numbers.
 - Quincy Public Library barcodes begin with 3344, followed by 10 numbers.
 - If you type the barcode, do not enter any spaces before or within the number.
 - If you scan the barcode, make sure the number is scanned without any spaces before or within the number.
- f. **Copy number:** This number is automatically generated by WorkFlows. Please do not edit this number.
- g. **Type:** Select the item type code that matches your item's format.
 - Example item types: BOOK, N-BK, CD-BOOK, DVD.
 - **Item type determines circulation and holds rules.**
 - Assigning an item type to each item cataloged is required.
 - RSA recommends customizing the item type menu to only include those codes used in your collection.
 - The complete list of item type codes is available here:
<https://alsi.sdp.sirsi.net/custom/web/RSAweb/SystemInfo/Parameters/Item%20Types.xls>.
 - Contact the RSA Help Desk at help@librariesofrsa.org to request changes to the codes in your item type drop-down menu or to set up new or modify existing circulation and hold rules.
- h. **Item library:** Your library's WorkFlows code.
- i. **Home location:** Select a home location code that indicates where the item is shelved in your library.
 - Example home locations: FICTION, NONFICTION, REFERENCE.
 - Assigning a home location to each cataloged item is required.
 - RSA recommends customizing the home location menu to only include those codes used in your collection.
 - The complete list of home location codes is available here:
<https://alsi.sdp.sirsi.net/custom/web/RSAweb/SystemInfo/Parameters/Home%20Location%20Codes.xls>.
 - Contact the RSA Help Desk at help@librariesofrsa.org to request changes to the codes in your home location drop-down menu or to suggest the creation of new home location codes.
- j. **Current location:** The current status of the item. This value cannot be edited.

- Example current locations: CHECKEDOUT, FICTION, INTRANSIT, MISSING.
 - The current location may differ from the home location.
- k. **Item cat 1:** Select FICTION or NONFICTION, depending on the item's content.
- The EQUIPMENT item cat 1 code can be used for any items that do not have fiction or nonfiction content.
 - Assigning an item cat 1 to each cataloged item is required.
 - Your library's item cat 1 menu is customized.
 - UNDEFINED and UNKNOWN must be in the item cat 1 menu, but they should not be assigned to items.
- l. **Item cat 2:** Select JUVENILE, YOUNGADULT, or ADULT that represents the item's reading, viewing, or listening level.
- The EQUIPMENT item cat 2 code can be used for any items that cannot be read, viewed, or listened to.
 - Assigning an item cat 2 to each cataloged item is required.
 - Your library's item cat 2 menu is customized.
 - UNDEFINED and UNKNOWN must be in the item cat 2 menu, but they should not be assigned to items.
- m. **Item cat 3:** Select the code that represents the item's general format.
- Item cat 3 is used for collection statistics and searching in the RSACat.
 - Example item cat 3 codes: AUDIOBOOK, BOOK, MOVIE, MUSIC.
 - Assigning an item cat 3 to each item cataloged is required.
 - Your library's item cat 3 menu is customized to include all the codes.
 - UNDEFINED and UNKNOWN must be in the item cat 3 menu, but they should not be assigned to items.
 - The complete list of item types and their corresponding item cat 3 codes is available here:
<https://alsi.sdp.sirsi.net/client/search/asset/3842>.
- n. **Item cat 4:** Select a code that represents the item's genre or subject.
- Item cat 4 is used for collection statistics and searching in RSACat.
 - Example item cat 4 codes: ROMANCE, MYSTERY, WESTERN.
 - Assigning an item cat 4 to each item cataloged is strongly recommended but not required.
 - Your library's item cat 4 menu may be customized to only include those codes used in your collection.
 - Contact the RSA Help Desk at help@librariesofrsa.org to request changes to the codes in your item cat 4 drop-down menu or to suggest the creation of new item cat 4 codes.

- UNDEFINED should be assigned to any items that are not assigned another item cat 4 code.
 - The complete list of item cat 4 codes is available here: <https://alsi.sdp.sirsi.net/client/search/asset/3862/0>.
- o. **Item cat 5:** Select a code that represents the item's sub-genre or secondary subject.
- Item cat 5 is used for collection statistics and searching in RSAcat.
 - Example item cat 5 codes: AR-LEVEL1, HOL-XMAS, MOVIE-R.
 - Assigning an item cat 5 to each item cataloged is optional.
 - Your library's item cat 5 menu may be customized to only include those codes used in your collection.
 - Contact the RSA Help Desk at help@librariesofrsa.org to request changes to the codes in your item cat 5 drop-down menu or to suggest the creation of new item cat 5 codes.
 - UNDEFINED should be assigned to any items that are not assigned another item cat 5 code.
 - The complete list of item cat 5 codes is available here: <https://alsi.sdp.sirsi.net/client/search/asset/3863>.
- p. **Item cat 6:** Select the code OCLCEXCLUD only if the item should not have your library's holding symbol attached to it when RSA batch updates holdings in OCLC.
- Updating holdings in OCLC allows the item to be discoverable in the WorldCat online catalog and visible for WorldShare interlibrary loan requests.
 - If your library's holding should be updated in OCLC for that item, or if your library does not belong to OCLC, assign the UNDEFINED item cat 6.
 - More information about OCLCEXCLUD is available in this cheat sheet: <https://support.librariesofrsa.org/project/oclcexclud-item-cat-6/>.
 - If item cat 6 does not appear on the Call Number/Item screen, you are not running the latest version of WorkFlows. Download the latest version here: <https://support.librariesofrsa.org/project/downloads-setup/>.
- q. **Item cats 7-10:** Select UNDEFINED if it is not already selected by default.
- RSA does not currently use item cats 7-10.
 - If item cats 7-10 do not appear on the Call Number/Item screen, you are not running the latest version of WorkFlows. Download the latest version here: <https://support.librariesofrsa.org/project/downloads-setup/>.

- r. **Number of pieces:** Edit this number if the item contains multiple pieces, such as a multi-disc audiobook, or if it includes another item, such as an accompanying CD, which will circulate with the item as one unit at check-out.
 - Examples:
 - An audiobook set that contains 12 discs would be entered as 12 pieces.
 - A tablet that checks out with its charger and protective case would be entered as 3 pieces.
 - A book that checks out with an accompanying CD would be entered as 2 pieces.
 - When the multi-piece item is checked out and discharged, a pop-up box will alert circ staff that the “item has associated materials.” Circ staff must enter the override password (i.e., RSA). Circ staff will then click **Override & Checkout Item** or **Override & Return**, depending on if the transaction is a checkout or a discharge.
 - If all pieces are not returned, circ staff should click **Do Not Return** on the pop-up box. Then contact the patron who last checked out the item.
- s. **Media desk:** Leave this box blank. It is used with a WorkFlows module that is not currently used.
- t. **Price:** Enter the replacement cost for the item. You may round up to the next whole dollar.
 - Contact the RSA Help Desk at help@librariesofrsa.org to set up default prices for the item types used by your library. Setting up default prices is optional.
 - Also contact the RSA Help Desk for assistance configuring your library’s checkout receipts to show patrons how much money they saved by using the library. Configuring receipts to show the amount saved is optional.
- u. **Total charges:** This number is automatically generated by WorkFlows. Please do not edit this number.
- v. **Circulate:** This box should be checked whether the item circulates or not.
 - The best way to prevent an item from circulating is to set up an item type with a no circulation rule.
 - Unchecking the circulate box does not prevent a hold from being placed on the item in WorkFlows or RSAcat.
 - If a hold is placed on an item with the circulate box unchecked, the hold will not appear on the picklist, and the hold will never be filled.

- Using an item type with a no circulation rule prevents the hold from being placed and avoids confusion.
- w. **Permanent:** This box should be checked unless the item is temporary to your collection.
- x. **Shadow item:** Ensure this box is unchecked.
 - Place a check mark in this box only if you do not want the item to be visible to patrons in the RSAcat.
 - Shadow items sparingly.
 - Examples of when to shadow:
 - items kept in storage
 - outreach collections
 - items cataloged before their official release dates (excluding on-order items)
 - in-library use only
 - equipment
 - items shelved in a holds pickup locker
 - items that are not available for use during a library renovation, relocation, or other closures
- y. **Extended information:** Enter additional information about the item. Using the extended information notes is optional.
 - CIRCNOTE: This note will appear as a pop-up when the item is checked out and when it is discharged in WorkFlows. A circ note does not require entry of the override password to close the pop-up. A circ note may be helpful to enter if you edited the number of pieces.
 - Example circ notes:
 - Please make sure power cord is included.
 - Please check for 6 discs.
 - Water damage noted on front cover -- 07/08/20.
 - PUBLIC: This note appears in the RSAcat on the item details page. A public note is visible to patrons and can provide important information about the item.
 - Example public notes:
 - Please visit the Adult Services Desk to check out the iPad. Self-check stations cannot be used to check out iPads.
 - This book was purchased with LSTA grant funds.
 - The CD that accompanied the book is missing.
 - STAFF: This note only appears when the item record is viewed in WorkFlows. The note is intended for staff purposes only.
 - Example staff notes:
 - Laptop protective case scratched -- 9/18/14.

- Donated in memory of Nancy Taylor.
- In-house use only; not available for checkout.

15. Click the **Save** button at the bottom of the screen.

Your library's item will appear first in the title / call number / item tree on the left side of the Call Number/Item screen. Below your item in the tree will be the other RSA libraries' items attached to that same bibliographic record. Here is an example tree, indicated in red:

The screenshot shows the 'Call Number and Item Maintenance' window. The title bar reads 'Call Number and Item Maintenance *'. Below the title bar, there's a tabbed interface with 'Control', 'Bibliographic', 'Call Number/Item', and 'Bound-with' tabs. The 'Call Number/Item' tab is active. The main area displays a tree view of call numbers and items. The tree is rooted at 'Pete the cat and the missing cupcakes - Dean, Kim, 1969- author, illustrator.' and branches into several call numbers. The item 'A87400245826 - 1 - BOOK - EASY' is highlighted in blue. A red rectangle is drawn around the tree view. To the right of the tree view, there's a form for 'Call number information' and 'Item information'. The 'Call number information' section includes fields for 'Call number:' (E DEA), 'Call library:' (A1_A-C-JRH), and a checkbox for 'Shadow call number'. The 'Item information' section includes fields for 'Item ID:' (A87400245826), 'Type:' (BOOK), 'Home location:' (EASY), and 'Item cat1:' (FICTION). At the bottom left, there's a section for 'Date created:', 'Date last charged:', 'Date due:', 'Last discharged:', 'Date inventoried:', and 'Times inventoried: 0'.

Call Number and Item Maintenance *

Pete the cat and the missing cupcakes / Dean, Kim, 1969- author, illustrator.

Control Bibliographic Call Number/Item Bound-with

Pete the cat and the missing cupcakes - Dean, Kim, 1969- author, illustrator.

AC-CENT-SD (A0_ / A1_)
 E DEA - A1_A-C-JRH
 A87400245826 - 1 - BOOK - EASY
 A5-ALWD-SD (A5_ / A6_)
 E DEA - A6_ALWD-ES
 A86411246592 - 1 - BOOK - EASY
 AB-SD (AB / AB2 / AV)
 E (DEA) LIT - AB2NGDN-GS
 A96000092642 - 1 - BOOK - EASY

Date created: 4/4/2017
 Date last charged: Never
 Date due: none
 Last discharged: Never
 Date inventoried: Never
 Times inventoried: 0

Call number information
 Call number: E DEA
 Call library: A1_A-C-JRH
☐ Shadow call number

Item information
 Item ID: A87400245826
 Type: BOOK
 Home location: EASY
 Item cat1: FICTION