

# Workflows How-To

## Add an Item or Call Number

**If you have additional questions, please contact:**

catalog@uproc.lib.mi.us

Shawn Andary, ALS System Administrator

[sandary@uproc.lib.mi.us](mailto:sandary@uproc.lib.mi.us)

906-226-4675 ext. 4

Jeremy Morelock, Online Database Maintenance Assistant

[jmorelock@uproc.lib.mi.us](mailto:jmorelock@uproc.lib.mi.us)

(906)226-4675 Ext. 112

### How to Add an Item or Call Number:

1. Select Current Toolbar: Cataloging
2. Click **Call Number and Item Maintenance Wizard**
3. Set Properties (optional – right click to select) – Click OK when completed (*You may want to change item info to make workflow smoother*)
  - Search preferences
    - Type = Keyword
    - Index = General
    - Library = Full access to all libraries
  - Editor display options
    - MARC View [Check]
    - Display fixed fields [Check]
    - Display Descriptive Labels [Check if you're not used to working with a MARC record]
  - Call number/item default values
    - Library = [Your Library Name]
    - Class Scheme = [DEWEY or LC]
  - Item required default values
    - Type = [your most used ITYPE NEW-BOOK, BOOK, etc]
    - Home Location = [your most used Location]
    - Item Cat 2 = [ADULT, JUVENILE, YOUNGADULT]
    - Item Cat 3 = [FICTION, NONFICTION, NOT-APP]
    - Item Cat 4 = [FORMAT – BOOK, CDBOOK, DVD, etc.]
4. Search for item
  - For ISBN, use General/Keyword
    - If the ISBN is not found, it will drop you into a subject list
    - If not found by ISBN, do a Title/Browse search

- For Title, use Title/Browse or Title/Keyword
5. Click Modify if necessary.
  6. Select item, Click the **Bibliographic** tab, and **Verify** record matches item in-hand. Check the following:
    - 020/ISBN
    - 100/Author
    - 245/Title
    - 260 or 264 /Publication
    - 300/Description
    - If not the correct record, click **Search** and repeat this step.
  7. **If your library already has a copy with the correct Call Number:**
    - Select your library/call number in the left-hand window
    - Click the **Add Item** button (at the bottom)
    - Enter Item information on the right-hand side – Click **SAVE** when completed
      - Item ID = Barcode
      - Copy number = will automatically update
      - Type = Item format or media type
      - Library = Your Library name
      - Home location = Where it will be located within your library
      - Category 1 = only for special collections that are intershelved
      - Category 2 = Reading level (Adult, Juvenile, Young Adult)
      - Category 3 = Fiction, Nonfiction, Not-app, or Unknown
      - Category 4 = Format (Book, Blu-Ray, CD, DVD, etc)
      - Media desk = Do not use
      - Number of pieces = Enter number of pieces (i.e. for books on cassette)
      - Total charges = Number of times checked out up to this point (not usually needed)
      - Price = Only enter a price if you want to override the default price
      - Permanent = Uncheck if item is part of a temporary collection
      - Circulate = Uncheck for Non-circulating
      - Shadow = Check if you don't want patrons to see the item in the public catalog
      - CIRCNOTE = Alerts staff each time the item is checked-in or out
      - PUBLIC Note = Note visible in the public catalog, UPCat

- STAFF Note = Note only visible to staff via Workflows
8. **If your library does not already have a copy but the call number exists for a different library:**
- Select the call number in the left-hand window (regardless of the library name)
  - Click **Add Call Number**
  - Select your library name and click OK
  - Enter Item information (see step #7) – Click **SAVE** when completed
9. **If your library does not already have a copy and/or the call number does not exist:**
- Select the Title in the left-hand window
  - Click **Add Call Number**
  - Select Library name and click OK
  - Enter Item information (see step #7) – Click SAVE when completed
  - Modify the call number – Click SAVE when completed
    - Select the call number you wish to change (in the left-hand window)
    - Edit the call number in the right-hand window
10. **Verify Call Number**
- After saving your new item, select your library and call number just above the highlighted barcode (on the left-hand side)
  - Examine the call number that appears on the right-hand side
  - Edit call number if necessary
  - Verify class scheme (usually Dewey, unless you've been told otherwise)
  - Click Save

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