



Library Resources Workflows Bulletin 11

Topic: Call Number and Item Maintenance

Related Topics: Add Call Number, Add Item, Call Number Changes, Equipment Records, Discard, Delete

Introduction: The Call Number and Item Maintenance wizard is used to add a new item or adding to an existing Call number also modify items, along with the discard/delete of items. The action Add has several acronyms; (Add Call Number or Add Volume) and (Add Item or Add Copy).

Figure 1 and figure 2 are screen shots of the 2 different options; Add Call Number, *fig 1* and Add Item, *fig 2*.

fig 1 - Add Call Number

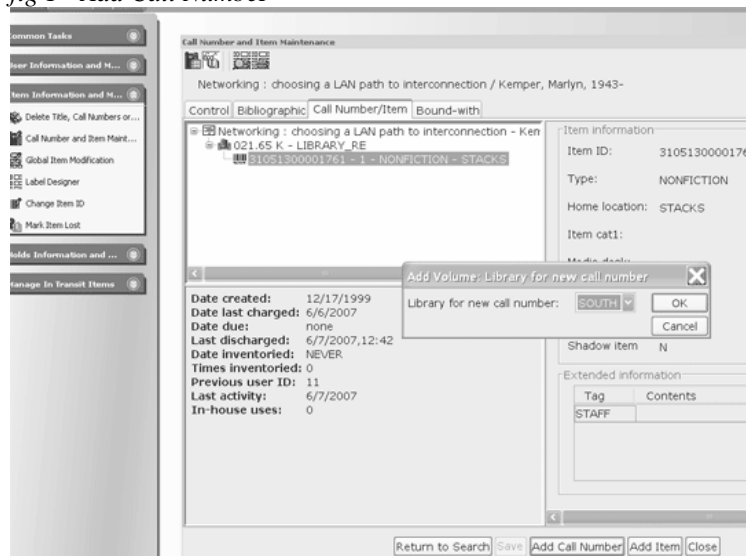
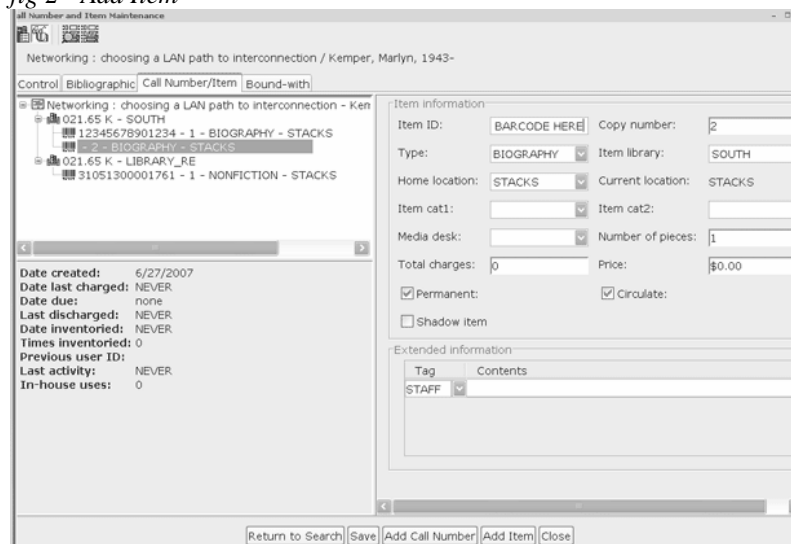


fig 2 - Add Item



Add Call Number: Add new item to your collection. *Figure 1*

Click the Item Information tab, located under the common tasks tab in the ASDCIRC tool bar.

1. Click Call number and Item Maintenance wizard.
NOTE: The properties window will open every time if you have not selected the radio button-**Never**, Review bulletin #01.
2. The Item Search window appears.
An exact search by ISBN.
 - a. If the item has the 020 tag, the Modify step is skipped and you are in the Item Information window.
3. Item Search by title or author.
The title will display, if the title has several MARC records, select the title that matches your item exactly.
 - a. Click Modify:
Verify the information on the Call Number/Item tabs. For more information on the item fields, go to Bibliographic Tab.
 - b. Click Add Call Number, the dialog box, The Library for New Call Number, opens, verify your school is defaulted or select from the drop down list, *Figure 1*
4. Click OK.
5. Item Information window opens, verify your school is selected or select from drop down menu.
Enter or scan in Item ID.
Copy number will automatically increment, review field, do not modify.
Review remaining fields, modify with your unique information.
Permanent, Circulate and Shadowed check boxes, use default.
Click Save to save the record
Close to close the wizard without saving your changes
Search to return to the Item Search window.

Add Item: Add an additional item/copy to your holdings. *Figure 2*

Click the Item Information tab, located under the common tasks tab in the ASDCIRC tool bar.

1. Click Call number and Item Maintenance wizard.
NOTE: The properties window will open every time if you have not selected the radio button-**Never**, Review bulletin #01
2. The Item Search window appears.
An exact search by ISBN.
If the item has the 020 tag, the Modify step is skipped and you are in the Item Information window.
 - a. Item Information window opens
Add the item to the current holding, click Add Item. On the Call Number/Item tab, the circulation data displays for the item .
Review fields
3. Search by item barcode
Scan item barcode you are adding a copy to
 - a. Item Information window opens
Add the item to the current holding, click Add Item. On the Call Number/Item tab, the circulation data displays for the item , *Figure 2*
Review fields
Copy number will automatically increment, review field, do not modify
Permanent, Circulate and Shadowed check boxes, use default
Save to save the record to the database
Close to close the wizard without saving your changes
Search to return to the Item Search window

Call Number Change:

Click the Item Information tab, located under the common tasks tab in the ASDCIRC tool bar.

1. Click Call number and Item Maintenance wizard.

NOTE: The properties window will open every time if you have not selected the radio button-Never Review bulletin #01

2. The Item Search window appears.

a. Scan item barcode

Index: Item ID.

The Modify step is skipped and you are in the next screen.

b. Enter the title of the call number that you need to change.

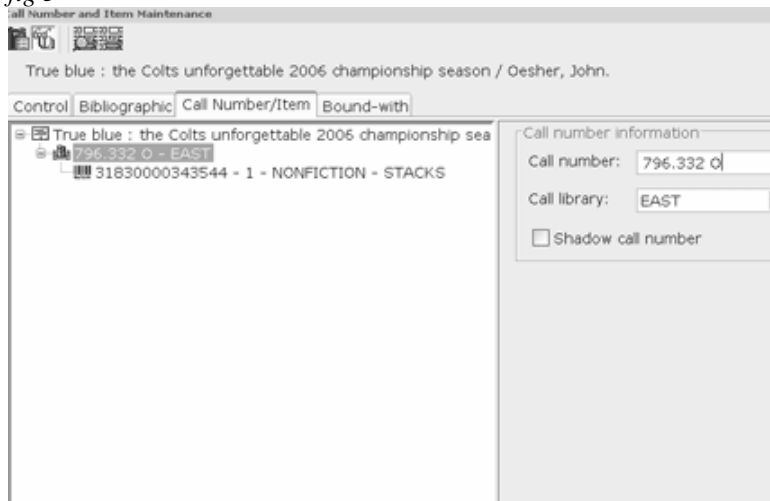
Remember that if you want to narrow your search, change the Index to Title and the Library to your library.

c. Click on the Call Number/Item tab to make sure that you have the correct title for the call number change. The tab lists all the holdings. If this is the correct title, click Modify button.

3. On the next window: On the left you have the Call Number/Item tab and on the right is Item Information, **click on your school name in the Call Number/Item tab.** The screen on the right will change to,

Figure 3, Call number information.

fig 3



4. In the Call number data field make your change (make sure the Call library data well is your school). Click Save.

Note: The Save button is gray *until you start to make your changes.*

Equipment Records: Equipment records are not standard MARC format

Entering equipment into Workflows is not mandatory. The function of equipment records in Workflows is to allow for check out and tracking of items. These records are *very simple*, *Figure 4* only a 245 Title field and 596 Held by field.

Search for Equipment:

Keyword search of EQ equipment, Index of Title, *Figure 4*, will result in the exact MARC record for equipment. Then select Modify, review list of Call Number and titles. *Figure 5*.

- If you don't find a title that fits your needs, Review Add Call Number instructions, below.
- If you do locate a title that fits your needs, Review Add Item instructions, below.

fig 4

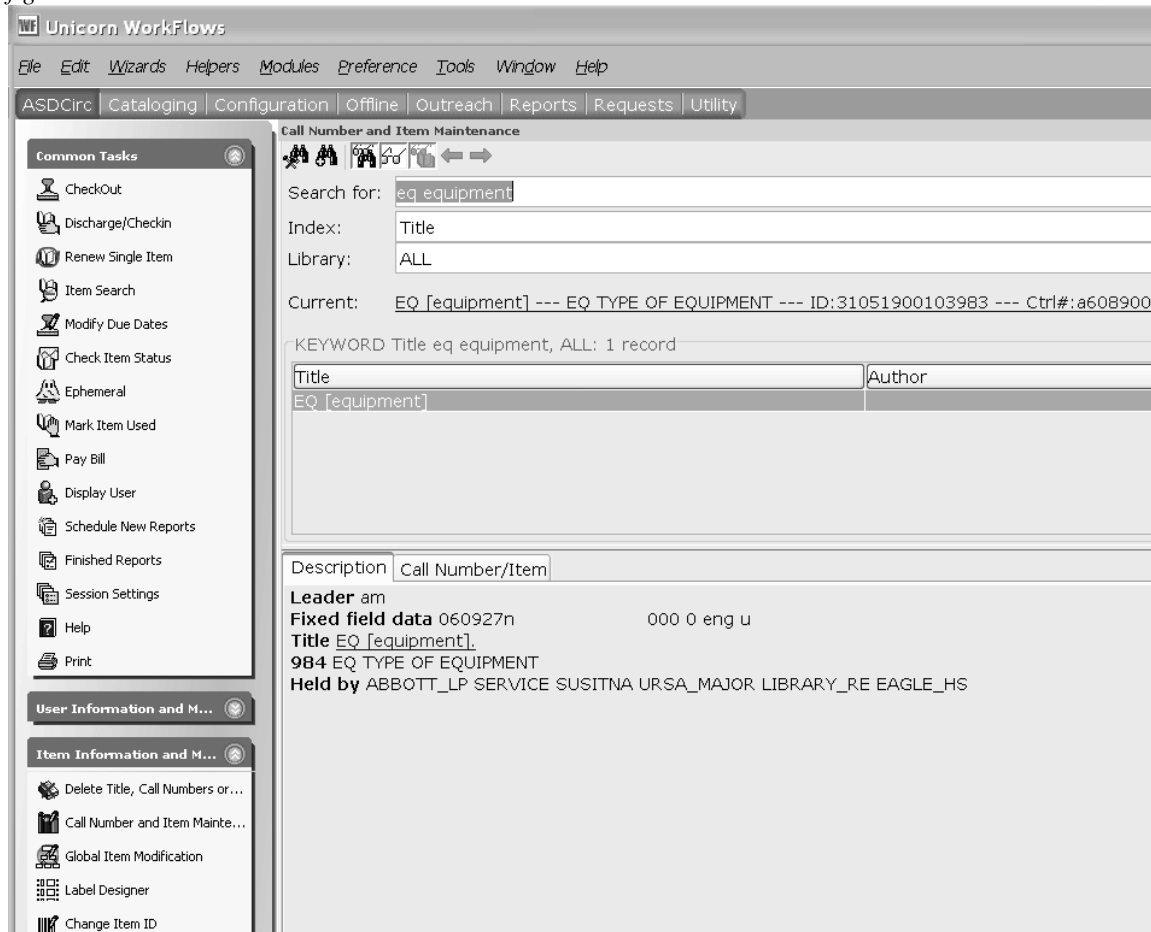
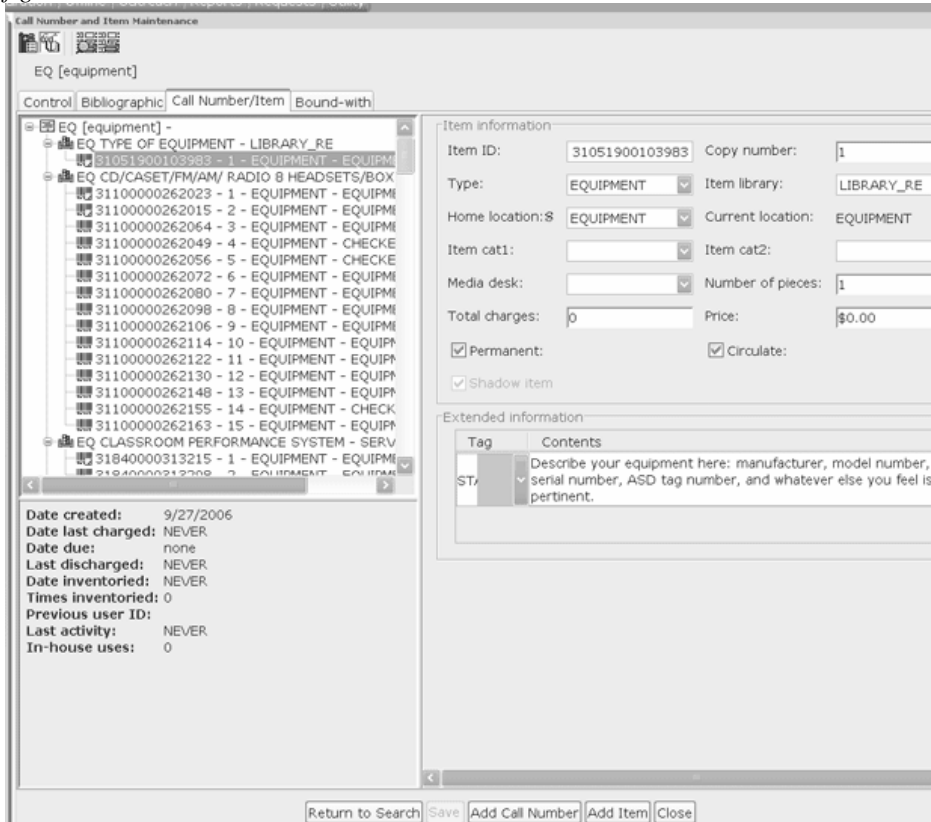
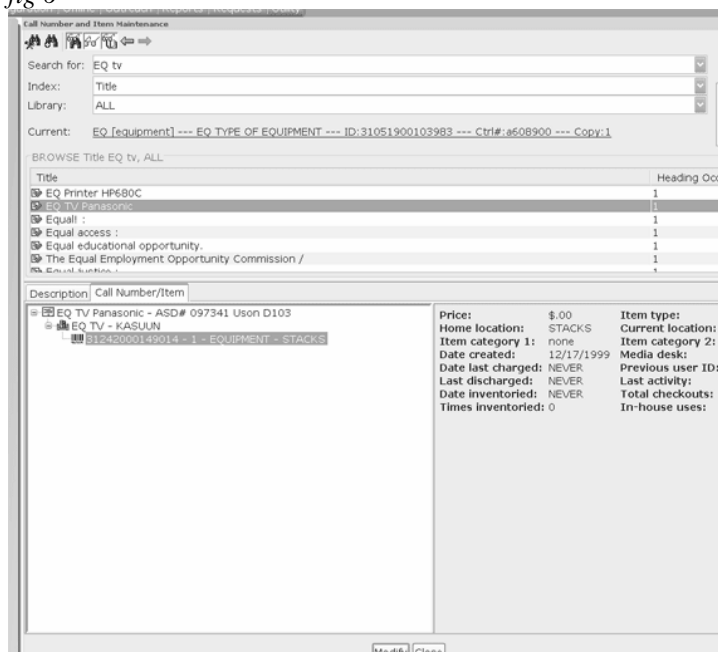


fig 5



Note: Do not use MARC records that are not to the format standard EQ space title of equipment. *Figure 6*

fig 6

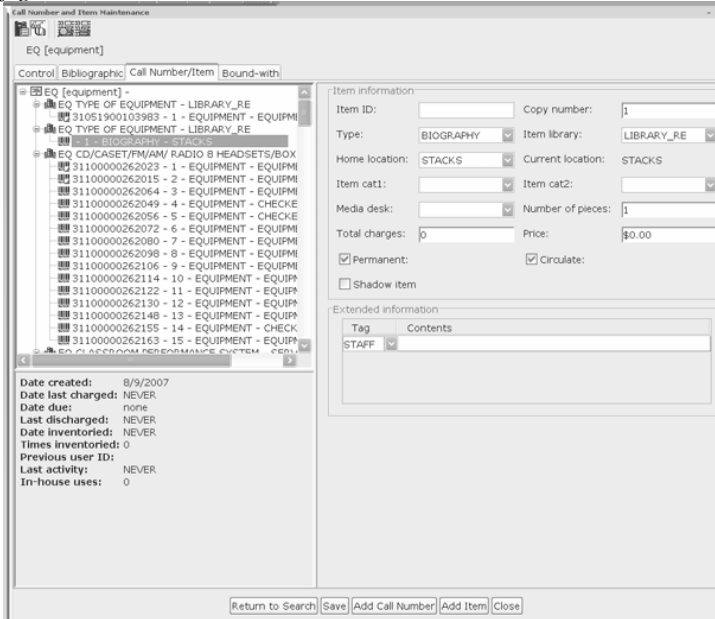


Add Call Number: New equipment, not already under the EQ [equipment] list.

After you have reviewed equipment list and did not find a suitable title for your item, go back to very first Call Number, EQ [equipment]

1. Click on to highlight and then select, Add Call Number. *Figure 7*

fig 7



2. The modify window opens *Figure 7*

Enter item information:

Barcode: Item ID - standard 14-digit item barcode.

Type: EQUIPMENT - This insures that the item will circulate for the correct period.

Home Location: EQUIPMENT - This insures that the record will be shadowed.

Extended Information: The field Staff Notes can further identify item by: Serial number, ASD tag, and/or number of pieces.

Click Save

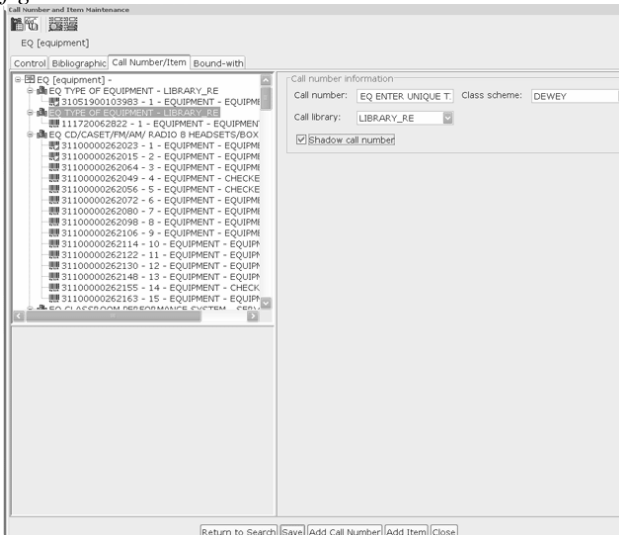
3. After Save is selected the unique title of the item can be entered. *Figure 8*

EQ space Title of Equipment.

Example: EQ EXTENTION CORD

Click Save

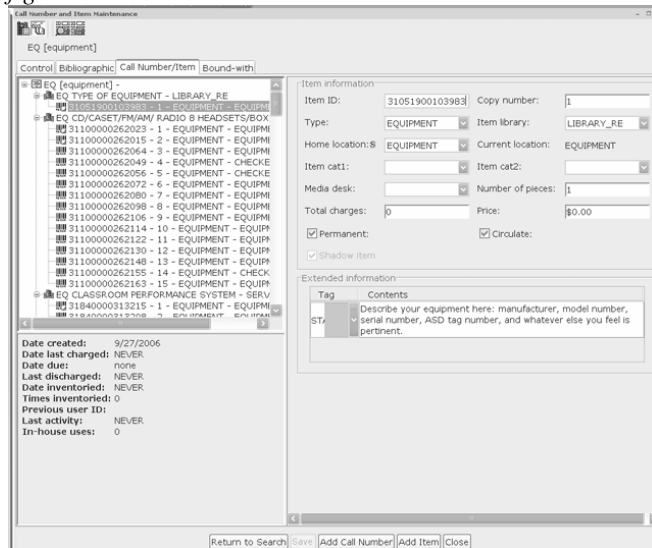
fig 8



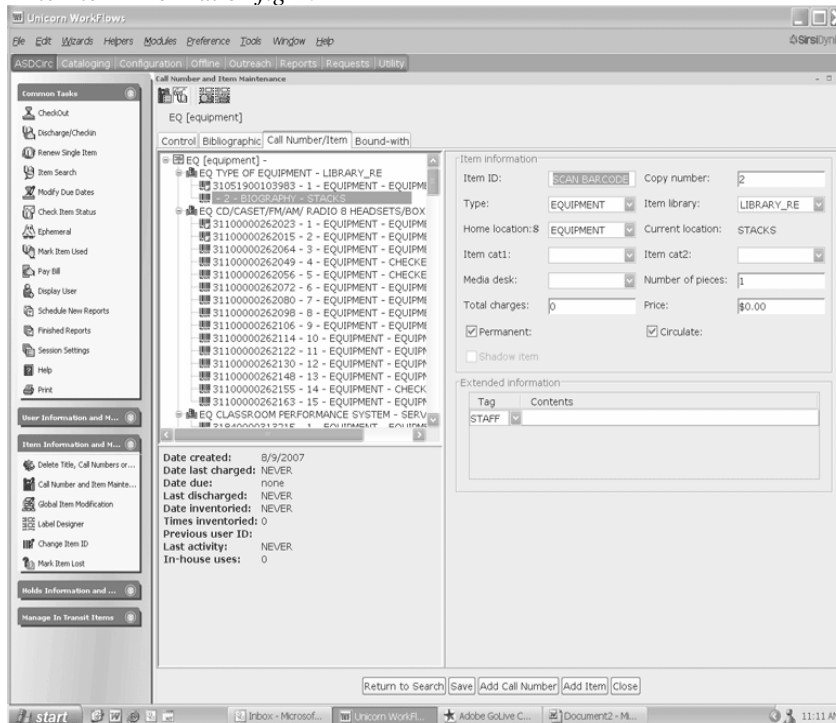
Add Item: Existing Equipment Title

1. Highlight your barcode under the EQ title you want to add another item to. *Figure 9*
Click Add Item

fig 9



2. Modify window opens *Figure 10*
Enter item information *fig 10*



Barcode: Item ID - standard 14-digit item barcode.

Type: EQUIPMENT - This insures that the item will circulate for the correct period.

Home Location: EQUIPMENT - This insures that the record will be shadowed.

Extended Information: The field Staff Notes can further identify item by: Serial number, ASD tag, and/or number of pieces.

Click Save

Note: Existing invalid Equipment records:

The equipment records need to be cleaned up to use the MARC record format EQ call number Title. Follow the delete instructions to clean up substandard equipment MARC records.

Discard:

The procedure discard, refers to the actual physical removal of an item from a library collection. When working with discards it is not necessary to alter or change the barcode number in any way.

All items in the DISCARD location are shadowed; they cannot be seen in WebCat., but they can be seen in Workflows.

Click the Item Information tab, located under the common tasks tab in the ASDCIRC tool bar.

1. Click Call number and Item Maintenance wizard.

NOTE: The properties window will open every time if you have not selected the radio button-Never, Review bulletin #01.

- a. The Item Search window appears.
Scan item barcode
The Modify step is skipped and you are in the next screen.
In the Home Location field click the drop down arrow, select Discard from the drop down menu.
Click Save.

Delete:

The procedure delete, refers specifically to the process of cleaning up substandard MARC records, or correcting and moving Call Numbers to copies.

Click the Item Information tab, located under the common tasks tab in the ASDCIRC tool bar.

1. Click Call number and Item Maintenance wizard.

NOTE: The properties window will open every time if you have not selected the radio button-Never, Review bulletin #01.

- a. The Item Search window appears.
Scan item barcode
The Modify step is skipped and you are in the next screen.
On the left you have the Call Number/Item tab and on the right is Item Information window.
- b. In the Item information window
Change barcode in the Item ID field to xxDELETE# , where the xx represent's your school's two-letter code and the # is a sequential number (ex: ALDELETE1).In the Home Location field click the drop down arrow, select DISCARD from the drop down menu.
Click Save.

Note: The Save button is gray until you start to make your changes.

Note: To see your school's two-letter code go to the following URL:

http://www.asdk12.org/depts/library_resources/codes.html

2. Now you are ready to add the original 14-character barcode back in. There are two choices to make:

- a. Add item to your collection into a good MARC record.
See this bulletin, [Add Call Number](#) section.
- b. Add a copy to your holdings. See this bulletin, [Add Item](#) section.

Final Removal of DISCARD items:

Items designated DISCARD in the home location will be permanently removed from Workflows by request. Submit LR Help ticket by email.

You will receive notification by return e-mail that these items have been removed from the database. Any report that a school needs to run should be completed well ahead of contacting Library Resources.

EOY Discards - End Of Year removal of DISCARD items: Items designated DISCARD in the home location will be permanently removed from Workflows every summer break. The exact date of batch removal will coincide with the end of summer library program. Any report that a school needs to run should be completed well ahead of the anticipated summer library program end date. The batch removal process will not delineate out a removed count by site. No notification will be sent to sites. At the beginning of the following school year run a discard list to verify all discards have been removed. Items with patron information attached to them will not be removed (failures) generally because of Bills. When the items, are clean submit an email help ticket to have discards removed.

Note:

Q. Why should you remove your discards from the database?

A. You will see fewer "item unavailable for display" messages in WebCat.; database will be more accurate.