

# Call Number and Item Maintenance— Add & Edit Items

Symphony WorkFlows catalog records utilize a four tiered system. In order to successfully add and edit items, you must be familiar with the four tiers. In much of the documentation you will also see the tiers referred to as trees. The first tier is the Title and Author. The second tier is the Owning Library information. The third tier is the Call Number or Volume information. The fourth tier contains the specific item information such as item ID, item type, and current location.

- Tier 1 - title and author
- Tier 2 - owning library system
- Tier 3 - call number and owning branch
- Tier 4 - item ID, copy number, item type and current location

**Call Number and Item Maintenance** x

< | Number and Item Maintenance

The return / Sparks, Nicholas,

Control Bibliographic Call Number/Item Bound-with

Title/Author → The return - Sparks, Nicholas,

Owning library system → ADAMS COUNTY

Call number → F SPA - ACM

Item ID → 39061004033590 - 1 - BOOK - FICTION

F SPA - ACN

39061004034267 - 1 - BROWSE-BK - CHECKEDOUT -

F SPA - ACP

39061004031628 - 1 - BOOK - FICTION

F SPA - ACW

39061004031560 - 1 - BROWSE-BK - CHECKEDOUT -

ADA

F SPA - ADA

34331000714294 - 1 - BOOK - INTRANSIT

ASHTABULA COUNTY

F SPARKS - ADG

33814009838451 - 1 - BOOK - FICTION

F SPARKS - ADG

# Call Number and Item Maintenance– Add & Edit Items

## 1. Item Search-

For in depth searching techniques and tips, read the document [Searching for Materials in WorkFlows](#) available on the SEO support site.

You can search for items within WorkFlows by using the Item Search Wizard. If you are searching for an item within the Cataloging Module, you can also use the **F4** function key to open the Item Search window. Within the Search Pane there are options to specialize a search: Index, Library or Type.

Indexes- Some of the most commonly used indexes include:

General- Searching using the General index, used in conjunction with the keyword type. It searches within every MARC tag within a bibliographic record.

Author- Using the Author index searches for your criteria in the author tags of the bibliographic record.

Title- This index searches for your search criteria in the title tags of the bibliographic record.

Subject- Searches for your search criteria in the subject fields of the bibliographic record.

Type-

Keyword- Keyword searching locates records that contain the terms you entered and displays them as a group.

Browse- Browse searching produces a list in the alphabetic vicinity of the term you entered.

Exact- The Exact search option displays a single record of the search index you used. This option is best for searching for item IDs.

Library-

This option is defaulted to search all libraries within the SEO Consortium. If you click the drop down box, you can search specific libraries.

## 2. Searching tips and examples-

General Keyword Searching-

Performing a General Keyword search will examine the entire bibliographic record. Use Boolean operators to join terms that may appear in different tags. Including the term "**AND**" in your search will retrieve data contained in more than one MARC tag. For example: Searching the terms James Patterson large print will not yield the best results. If you add the boolean operator "**and**" between the words James Patterson and large print, your results will be more accurate.

Precise Phrase Searching-

To search for terms in the exact order entered, enclose the expression in single quotes. Remember this: 'Single quotes, single phrase' SirsiDynix Symphony will locate items in the catalog, exactly as typed in the search field. For example, '**Martin Luther King**' searches only for items that have these words, in this order.

# Call Number and Item Maintenance– Add & Edit Items

## 2. Searching tips and examples continued-

### Searching Specific Fields-

Every record in the Symphony database has standard entry MARC tags. You can limit the search to a certain tag within a bibliographic record. Using the General search index, enter your search expression followed by the entry tag enclosed in braces {}

Examples:

**Charles Dickens {100}** - This search would look for the words Charles and Dickens in the author field of the record.

**Air pollution {650}** - This search would look for the words air and pollution within a subject field or heading.

## 3. Using Call Number and Item Maintenance to Add Items and Call Numbers-

You will use the **Call Number and Item Maintenance Wizard** to add and edit items.

A. Open the Call Number and Item Maintenance Wizard located within the Common Tasks Wizard Group in the TECH Module.

B. Search for the title for which you want to add items.

C. If the search results in a hit list of titles, select the title from the list and click **Modify**.

Call Number and Item Maintenance \*  
Od Number and Item Maintenance

Search for: October Sky  
Index: Title  
Library: ALL

Current:

KEYWORD Title October Sky, ALL: 10 records

Title	Author	Pub. Year
October sky [DVD]	Johnston, Joe, 1950-	2005
October sky [videocassette]	Gyllenhaal, Jake, 1980-	2000
OCTOBER SKY : A MEMOIR [kit]	Hickam, Homer H., 1943-	1999
October sky [videocassette]	Johnston, Joe, 1950-	1999
October sky : a memoir	Hickam, Homer H., 1943-	1999
October sky [DVD]	Gordon, Charles	1999
October sky [compact disc] original motion pictu	Icham, Mark	1999

Description Call Number/Item

Leader amIa0c  
key ocm40866963  
Data source OCoLC  
Date/time stamp 20070701152900.0  
Fixed field data 990226t19991998nyu 000 0aeng d  
ISBN 0440235502 (pbk) : \$6.99  
Local system # (Sirsi) 861765  
Cataloging source BPL BPL JNE SLC OCoLC  
Local holdings SLCu  
Local LC call number PS3558.I224 O27 1999x  
Local Dewey call num 629.4092 H  
Personal Author Hickam, Homer H., 1943-  
Title October sky : a memoir / Homer H. Hickam, Jr.  
Publication info New York : Island Books, 1999, c1998.  
Physical description xvi, 428 p. : 18 cm.

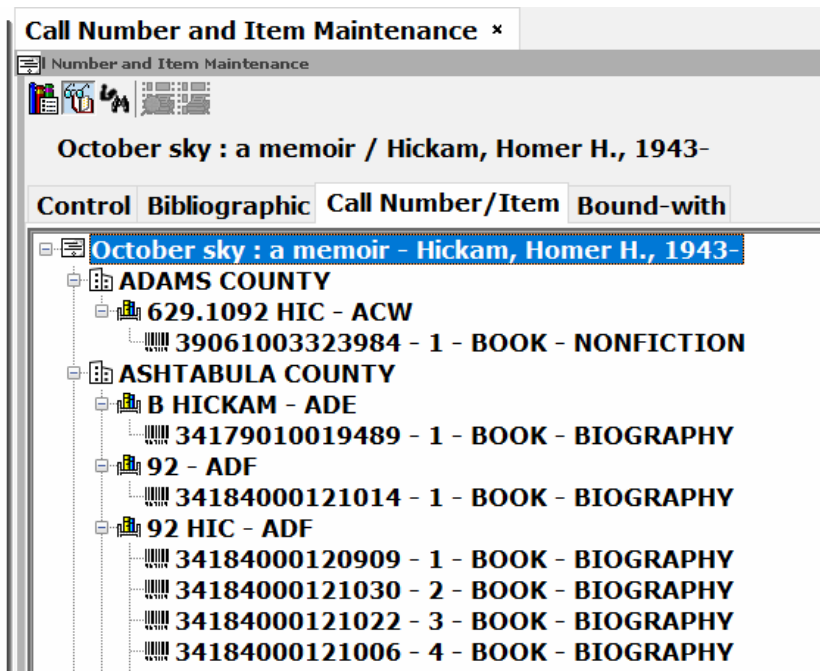
Modify Close

# Call Number and Item Maintenance– Add & Edit Items

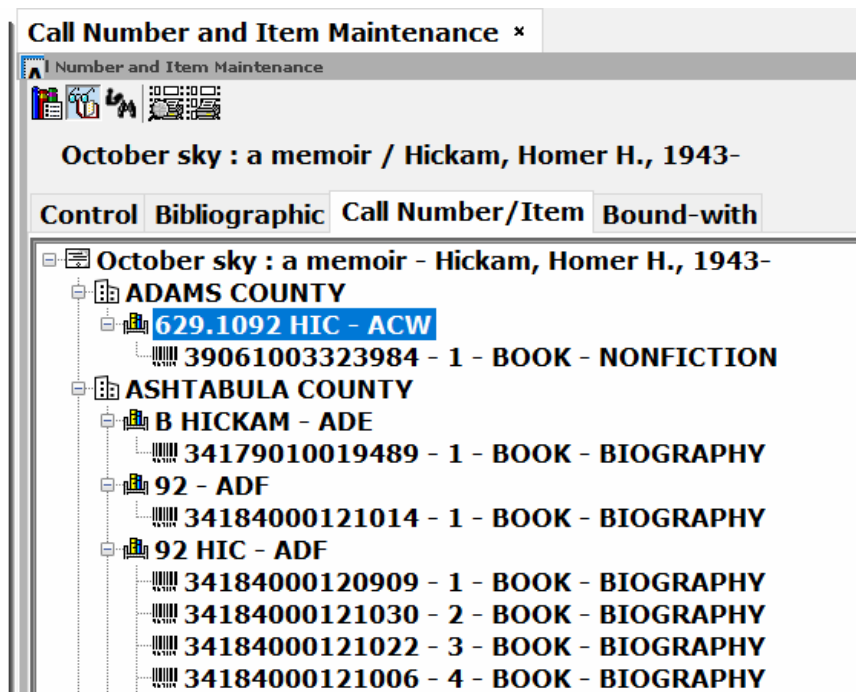
D. At this point you have to ask yourself this question-

**Does my library already own a copy of this item with the call number I want to use on my new item?**

**If NO-** Select the **Title** in the tree on the left and then click **Add Call Number** and go to the next page.



**If YES-** Select the **Call number** in the tree on the left to which you want to add the new item and click **Add Item** and skip to page 8.

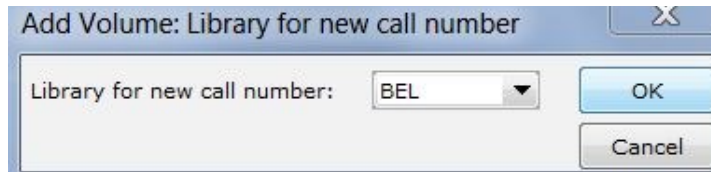


# Call Number and Item Maintenance– Add & Edit Items

Does my library already own a copy of this item with the call number I want to use on my new item?

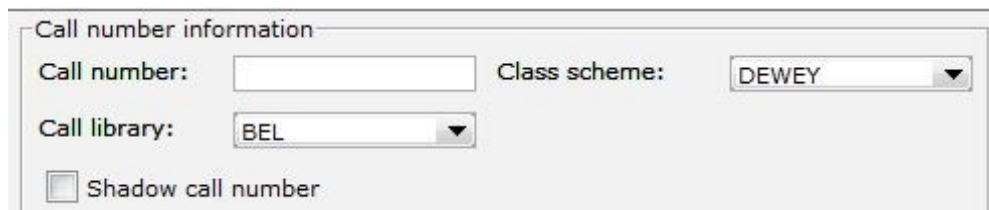
4. If your answer was **NO** and you clicked **Add Call Number**, please perform the following steps:

A. Click the Dropdown box and select the appropriate library. Click OK.



B. In the Call Number field, edit the call number to reflect what you want for your item.

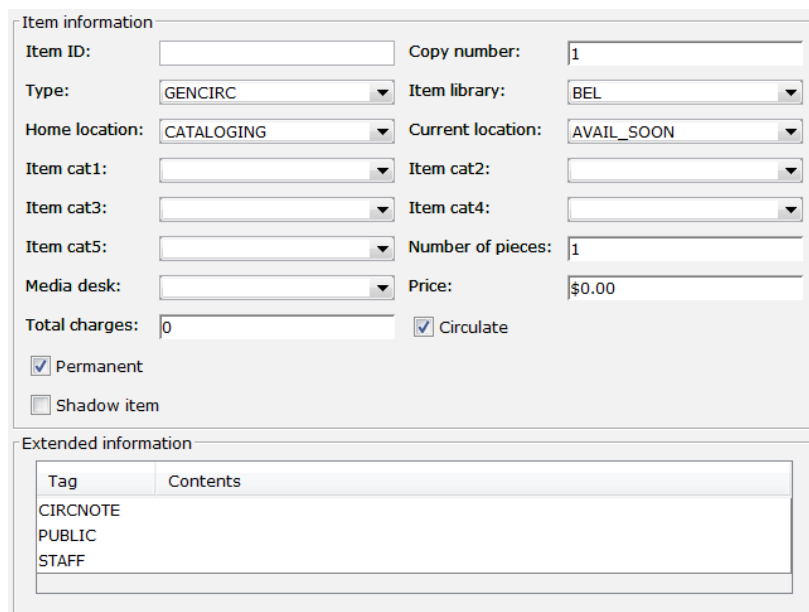
C. Class Scheme- With the exception of SEO, all of the member libraries will use the Dewey classification.



D. Call Library- This value represents the owning library for this call number. **Each library and branch must have its own call number record, even if the call numbers are exactly the same.**

E. Scan the barcode into the Item ID field.

F. Copy Number- Copy Number is system generated. Please do not change it.



# Call Number and Item Maintenance– Add & Edit Items

The screenshot shows a web form for item maintenance. It is divided into two main sections: 'Item information' and 'Extended information'.

**Item information section:**

- Item ID:** A text input field.
- Copy number:** A text input field with the value '1'.
- Type:** A dropdown menu with 'GENCIRC' selected.
- Item library:** A dropdown menu with 'BEL' selected.
- Home location:** A dropdown menu with 'CATALOGING' selected.
- Current location:** A dropdown menu with 'AVAIL\_SOON' selected.
- Item cat1:** A dropdown menu.
- Item cat2:** A dropdown menu.
- Item cat3:** A dropdown menu.
- Item cat4:** A dropdown menu.
- Item cat5:** A dropdown menu.
- Number of pieces:** A text input field with the value '1'.
- Media desk:** A dropdown menu.
- Price:** A text input field with the value '\$0.00'.
- Total charges:** A text input field with the value '0'.
- Circulate:** A checked checkbox.
- Permanent:** A checked checkbox.
- Shadow item:** An unchecked checkbox.

**Extended information section:**

This section contains a table with two columns: 'Tag' and 'Contents'.

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

G. Type- This field refers to Item Type. It sets the loan period, the fine rate, if it is allowed to circulate, and if it is allowed to have holds placed on it.

H. Item Library- This should be your library three letter code.

I. Home Location- Home location describes where the item is normally shelved or found in your library. **Please use the dropdown to choose the correct home location.**

J. Current Location- Current location refers to the location where the item is physically located at this time. When creating a new item record, this is defaulted to “**Avail Soon**” which means Available Soon. **Leave the current location as “Avail Soon”.** This will give you time to complete the physical processing of your item. When you check the item in, the system will change the current location to the home location.

K. Item Cat 1- Item format.

L. Item Cat 2- Audience level. **\*\* If your item is categorized as juvenile, you must choose **JUVENILE** in Item cat2 so the item will be indexed in the juvenile catalog.\*\***

M. Item Cat 3- Genre.

N. Item Cat 4- Reading level.

O. Item Cat 5- Currently undefined.

P. Media Desk- is an element of the Materials Booking module which we are not presently using. You will not have to do anything in this field.

Q. Number of Pieces- Setting the Number of Pieces field to a value other than 1 has an impact on the circulation desk. When checking an item in or out, circulation staff will be asked to confirm with an override that all elements of a multipart set are in place.

**\*\*\*SEE NOTE AT END OF SECTION CONCERNING NUMBER OF PIECES VS. CIRCNOTE\*\*\***

# Call Number and Item Maintenance– Add & Edit Items

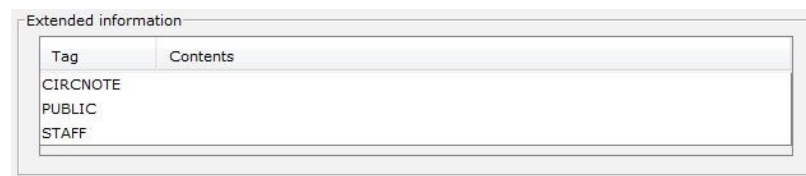
R. Total Charges- This field lists the total number of times the item has been checked out. You will not have to edit this field. It will be automatically populated by the software.

S. Price- Please enter the value or price of your item.

T. Permanent indicates whether the item is part of your library's permanent collection.

U. Circulate allows items that would normally not circulate, by system-generated circulation rules, to be checked out with an override.

V. In the Extended Information section, you can enter notes about this particular item. You can view all three types of notes in the item-level record in Workflows. Properties can be configured to allow information entered in the CIRCNOTE field to display when an item is checked out, checked in and renewed. Public Notes are also visible to users viewing the record in the online catalog. To add a note, click to the right of the type of note you want to leave and type. These are free text fields.



Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

W. Click **Save** to retain your item record.

**Please Note:** Number of Pieces and CIRCNOTE are similar but have distinct differences. Please see the chart below.

## Number of Pieces

## CIRCNOTE

Allows you to specify the number of pieces included, numerically only. <u>Example:</u> Number of Pieces: 8	Allows you to specify the number of pieces included using a free text field. <u>Example:</u> CIRCNOTE: 8 DISCS
The Number of Pieces message automatically displays during checkout or checkin.	The contents of the CIRCNOTE are currently configured to display during checkin only.
When checking an item in or out, circulation staff will be asked to enter the override verifying that all elements of a multipart set are in place.	During checkin, the CIRCNOTE will display after the barcode has been scanned. Staff will be required to click Close to continue the transaction.
The Number of Pieces message appears BEFORE a transaction has completed. <u>Example:</u> <b>During checkin</b> , if there are pieces missing, the staff will have the option to stop the transaction. They can choose not to check in an item if it has missing pieces, leaving the item checked out to the previous user. <u>Example:</u> <b>During checkout</b> , if staff notices that the item is missing pieces, they have the option to not check out the item.	During checkin, the CIRCNOTE will display after the barcode has been scanned. <u>Example:</u> <b>During checkin</b> , if they discover pieces are missing, the staff will not be able to halt the transaction. Their only option is to close the alert window. If the item was placed in transit or trapped to fulfill a hold, the item will need to be either checked out to the library's Mending User or the Damaged User.

**\*\*\*You may choose to use either alert when adding your items, however PLEASE CHOOSE ONLY ONE. If you use both, duplicate alerts will display.\*\*\***



# Call Number and Item Maintenance– Add & Edit Items

Does my library already own a copy of this item with the call number I want to use on my new item?

5. If your answer was **YES** and you clicked **Add Item**, please perform the following steps:

The screenshot shows a web form for adding or editing an item. It is divided into two main sections: 'Item information' and 'Extended information'.

**Item information section:**

- Item ID: [text input field]
- Copy number: [text input field with value '1']
- Type: [dropdown menu with 'GENCIRC' selected]
- Item library: [dropdown menu with 'BEL' selected]
- Home location: [dropdown menu with 'CATALOGING' selected]
- Current location: [dropdown menu with 'AVAIL\_SOON' selected]
- Item cat1: [dropdown menu]
- Item cat2: [dropdown menu]
- Item cat3: [dropdown menu]
- Item cat4: [dropdown menu]
- Item cat5: [dropdown menu]
- Number of pieces: [text input field with value '1']
- Media desk: [dropdown menu]
- Price: [text input field with value '\$0.00']
- Total charges: [text input field with value '0']
- ☒ Circulate
- ☒ Permanent
- ☐ Shadow item

**Extended information section:**

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

A. Scan the barcode into the Item ID field.

B. Copy Number- Copy Number is system generated. Please do not change it.

C. Type- This field refers to i-type or Item Type. It sets the loan period, the fine rate, if it is allowed to circulate, and if it is allowed to have holds placed on it.

D. Item Library- This should be your library three letter code.

E. Home Location- Home location describes where the item is normally shelved or found in your library. **Please use the dropdown to choose the correct home location.**

F. Current Location- Current location refers to the location where the item is physically located at this time. When creating a new item record, this is defaulted to "Avail Soon" which means Available Soon. **Leave the current location as "Avail Soon"**. This will give you time to complete the physical processing of your item. When you check the item in, the system will change the current location to the home location.

G. Item Cat 1- Item format.

H. Item Cat 2- Audience level. **\*\* If your item is categorized as juvenile, you must choose JUVENILE in Item cat2 so the item will be indexed in the juvenile catalog. \*\***

I. Item Cat 3- Genre.

J. Item Cat 4- Reading level.

K. Item Cat 5- Currently undefined.

L. Media Desk- is an element of the Materials Booking module which we are not presently using. You will not have to do anything in this field.



# Call Number and Item Maintenance– Add & Edit Items

The screenshot shows a web form for item maintenance. The 'Item information' section contains fields for Item ID, Copy number (set to 1), Type (GENCIRC), Item library (BEL), Home location (CATALOGING), Current location (AVAIL\_SOON), five item category fields (all empty), Number of pieces (set to 1), Price (\$0.00), Total charges (set to 0), and checkboxes for Circulate (checked), Permanent (checked), and Shadow item (unchecked). The 'Extended information' section features a table with columns 'Tag' and 'Contents'. The 'Tag' column lists CIRCNOTE, PUBLIC, and STAFF, while the 'Contents' column is empty.

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

M. Number of Pieces- Setting the Number of Pieces field to a value other than 1 has an impact on the circulation desk. When checking an item in or out, circulation staff will be asked to confirm with an override that all elements of a multipart set are in place.

N. Total Charges- This field lists the total number of times the item has been checked out. You will not have to edit this field. It will be automatically populated by the software.

O. Price- Please enter the value or price of your item.

P. Permanent indicates whether the item is part of your library's permanent collection.

Q. Circulate allows items that would normally not circulate, by system-generated circulation rules, to be checked out with an override.

R. In the Extended Information section, you can enter notes about this particular item. You can view all three types of notes in the item-level record in Workflows. Properties can be configured to allow information entered in the CIRCNOTE field to display when an item is checked out, checked in and renewed. Public Notes are also visible to users viewing the record in the online catalog. To add a note, click to the right of the type of note you want to leave and type. These are free text fields. **\*\*\*Please see note on page 7 concerning Number of Pieces versus CIRCNOTE\*\*\***

S. Click **Save** to retain your item record.

# Call Number and Item Maintenance—Add & Edit Items

## 6. Editing an Existing Call Number or Item-

A. Open the **Call Number and Item Maintenance Wizard**.

B. Search for the title for which you want to make modifications.

C. In the hit list, select the title from the list and click **Modify**. The **Call Number/Item** tab appears displaying the call number and item information.

D. To display and edit **only** call number information, click on the appropriate call number in the tree.

**\*\*\*Remember, any changes or edits made in the call number information pane will affect all the items listed immediately under that call number.\*\*\***

Control Bibliographic Call Number/Item Bound-with

October sky : a memoir - Hickam, Homer H., 1943-

PS 3558 .I224 O27 1999x - SEO

- 31705003323513 - 2 - GENCIRC - BOOK
- 31705003323406 - 3 - GENCIRC - BOOK
- 31705003323331 - 4 - GENCIRC - BOOK
- 31705003140669 - 5 - GENCIRC - BOOK
- 31705003323471 - 6 - GENCIRC - BOOK
- 31705003323398 - 8 - GENCIRC - BOOK
- 31705003323356 - 9 - GENCIRC - BOOK
- 31705003323448 - 11 - GENCIRC - BOOK

629.1092 HIC - ACM

39061001125845 - 1 - GENCIRC - NONFICTION

629.1092 HIC - ACW

39061003323984 - 1 - GENCIRC - NONFICTION

ANF 920 HIC - ALG

34382000018558 - 1 - GENCIRC - NONFICTION

Y-PB Hick - ATT

33590000480807 - 1 - GENCIRC - JUVFICTION

B HICKAM - BAR

Call Number Holds

Call number information

Call number: PS 3558 .I224 O27 1999x Class scheme: LC

Call library: SEO

☐ Shadow call number

E. To make changes to a specific item record, click on the appropriate item ID in the tree. You cannot edit anything in the call number window. If you do, your changes will affect all the items under that same call number. You can only edit the information in the item information window.

F. Make any modifications and click **Save** and **Close**.

Control Bibliographic Call Number/Item Bound-with

October sky : a memoir - Hickam, Homer H., 1943-

PS 3558 .I224 O27 1999x - SEO

- 31705003323513 - 2 - GENCIRC - BOOK
- 31705003323406 - 3 - GENCIRC - BOOK
- 31705003323331 - 4 - GENCIRC - BOOK
- 31705003140669 - 5 - GENCIRC - BOOK
- 31705003323471 - 6 - GENCIRC - BOOK
- 31705003323398 - 8 - GENCIRC - BOOK
- 31705003323356 - 9 - GENCIRC - BOOK
- 31705003323448 - 11 - GENCIRC - BOOK

629.1092 HIC - ACM

39061001125845 - 1 - GENCIRC - NONFICTION

629.1092 HIC - ACW

39061003323984 - 1 - GENCIRC - NONFICTION

ANF 920 HIC - ALG

34382000018558 - 1 - GENCIRC - NONFICTION

Y-PB Hick - ATT

33590000480807 - 1 - GENCIRC - JUVFICTION

B HICKAM - BAR

Date created: 1/21/2003

Date last charged: 12/5/2012

Date due: none

Last discharged: 2/22/2013,15:45

Date inventoried: Never

Times inventoried: 0

Previous user ID:

Last activity: 2/26/2013

In-house uses: 0

Item Info Holds

Call number information

Call number: PS 3558 .I224 O27 1999x Class scheme: LC

Call library: SEO

☐ Shadow call number

Item information

Item ID: 31705003323331 Copy number: 4

Type: GENCIRC Item library: SEO

Home location: BOOK Current location: BOOK

Item cat1: BOOK Item cat2: ADULT

Item cat3: FICTION Item cat4:

Item cat5: Number of pieces: 1

Media desk: Price: \$7.50

Total charges: 15 ☒ Circulate

☒ Permanent

☐ Shadow item

Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	PAPERBACK
STAFF	

# Call Number and Item Maintenance– Add & Edit Items

## 7. Deleting Titles, Call Numbers or Items-

Items can be deleted using two different procedures.

If you want WorkFlows to record a count of items deleted, checkout the items to your Discard Special User.

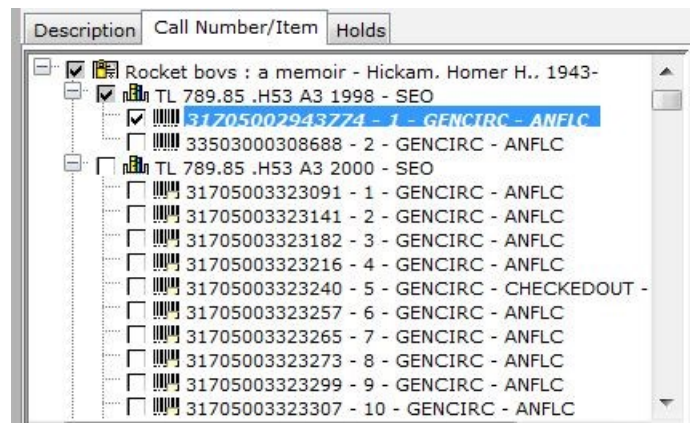
If you do NOT want WorkFlows to record the number of items deleted, Use the procedure outlined below. Use the Delete Title, Call Numbers or Item Wizard to remove a Title, Call Number, or Item record **permanently** from the database. If the item you are deleting is the last remaining item on a bibliographic record, the bibliographic record will no longer exist in the database.

A. Open the Delete Title, Call Numbers or Items Wizard located in the TECH module.

B. Type in the search terms in the Search for box and click **Search**. You can also scan an Item ID/barcode. You just need to change the Index to Item ID.

C. **To delete an individual item**, **select the check box next to the item you want to delete**. If you select the only item record under a call number, the call number will also be selected for removal. If you select the only item on the title record, the title/bibliographic record will also be selected for removal.

D. As you can see to the right, item 31705002943774 is selected for deletion. The picture also shows that the call number and title are checked. But notice, they are grayed out. There are more items under that specific call number, and more items under that title. The call number and title will NOT be deleted. Only the item selected will be deleted.



E. Click **Delete** then the click **Close** to exit the wizard.

If you selected call numbers or copies that are not eligible for removal, they will display in an exception list indicating why the items could not be removed. If you removed the last copy or volume attached to a title, a confirmation window will appear.

Users can only delete call numbers and items for libraries in their Call Number Maintenance and Item Maintenance Library Groups.

When using the Delete Title, Call Numbers or Item Wizard, if a call number/item has pending requests, it cannot be removed. Any item that is checked out or has unpaid bills cannot be deleted. In this instance, you must use the Discard User to delete the item.

If you have many items to delete, you may want to use the Discard User for your location.