Using Cataloging module on the Workflows Java Client GL 3.1

Last Updated February 7, 2008

Contents

Introduction

Be sure to check your property settings in cataloging immediately after upgrading your Workflows client to GL 3.1. You must be logged in as TECH or ACQ (for those libraries using the Acquisitions module) to make and save property changes. To view and change property settings, you must right-click on the wizard.

Getting Started

This section describes logging in to WorkFlows, the WorkFlows screen, tabs, wizards, helpers, keyboard shortcuts, links to current patron and current item information, glossaries, sorting, and gadgets.

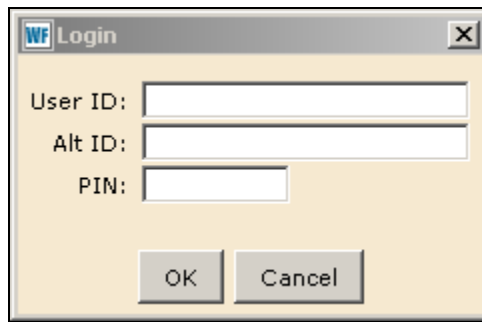## Logging into WorkFlows

To log into WorkFlows:

1. Click on the WorkFlows icon located on your computer desktop.

When the following screen appears, click **OK.**

The login screen then appears.

2. Enter your library's **User ID** and **PIN**, and click **OK**.

If you do not know your library's User ID or PIN, contact an administrator at your library or contact SAILS.

The User ID and PIN serve several purposes, including:

- It defines what features of WorkFlows you can use.
- It identifies your computer to your library.

The WorkFlows Screen

After you enter your library's User ID and PIN, the computer starts WorkFlows. This may take a minute or two. Then, the WorkFlows screen appears.
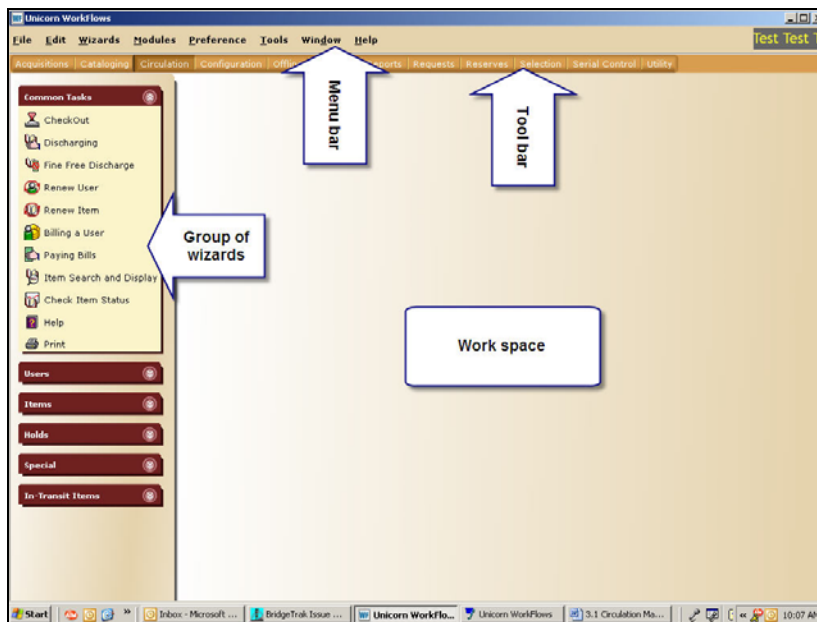

Toolbars

Each toolbar, such as the Cataloging toolbar, consists of wizards, which are grouped into "groups of wizards".
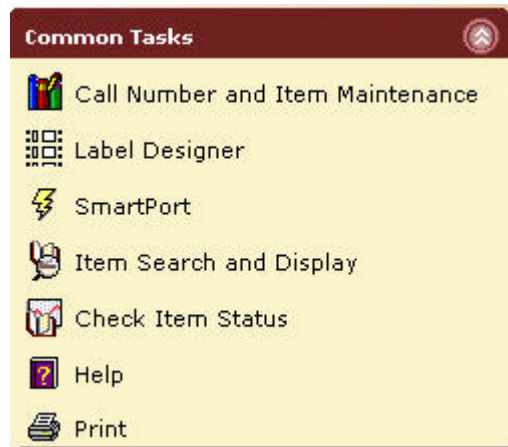
Wizards

A wizard is the feature of WorkFlows that you use to perform a specific task, such as checking out an item, registering a patron, or placing a hold for an item.

WorkFlows arranges wizards that have similar functions into groups of wizards (such as Common Tasks, Users, Titles, and Items) on the left side of the screen. To open or close a group of wizards, click the open/close icon:
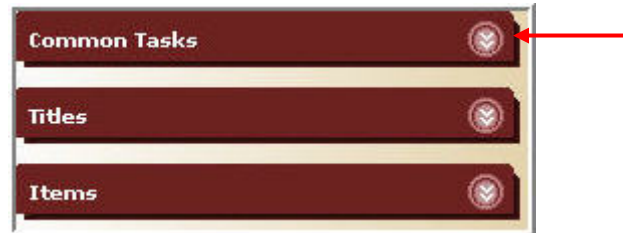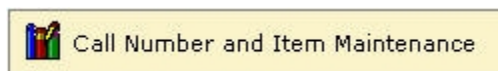

For example, the Common Tasks group of wizards looks like this:

To use a wizard, click on the wizard icon or text within the group of wizards. If you are unsure what a wizard does, move your mouse over the image without clicking. Brief text will appear describing the function of that wizard.
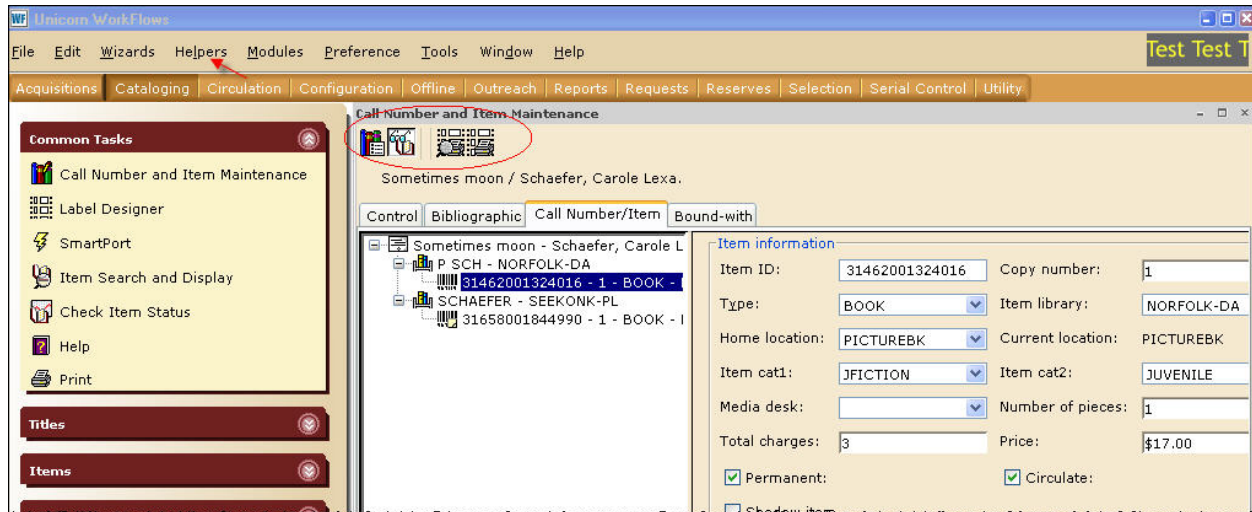
For example, to edit a call number, begin by clicking:

Helpers

Helpers appear within each wizard (see the following figure). A helper is a link to a wizard.

Another way to access a helper is to click Helpers in the menu bar and select a helper from the drop-down list.

Keyboard shortcuts

You may find that keyboard shortcuts can save time and are easier to use than clicking with the mouse.

Keyboard shortcut: ALT + [underlined letter]

In the above example of searching for a title, press ALT and the letter "s" at the same time. The system will search for the title as if you had clicked on the Search button.

When you are in the Cataloging module, you can access a wizard by using a function key. For example, the function key to access the Add Item wizard is F9. A table of all function keys appears below. To change the function key for a wizard, see Mapping function keys on page 15.

| Wizard	Key Sequence
Add Title	SHIFT+F2
Modify Title	ALT+F2
Duplicate Title	SHIFT+F3
Delete Title, Call Numbers or Items	F11
Call Number/Item Maintenance	SHIFT+F9
Add Item	F9
Edit Item	SHIFT+F11
Global Item Modification	ALT+F11
Display Authority	ALT+F5
Bound-withs	ALT+F3
Label Designer	None
Item Search and Display	F4
Check Item Status	F2
Help	F1
Print	F12

Windows keyboard shortcuts

You can use standard Windows editing shortcuts, such as:

- CTRL + X for cut
- CTRL + C for copy
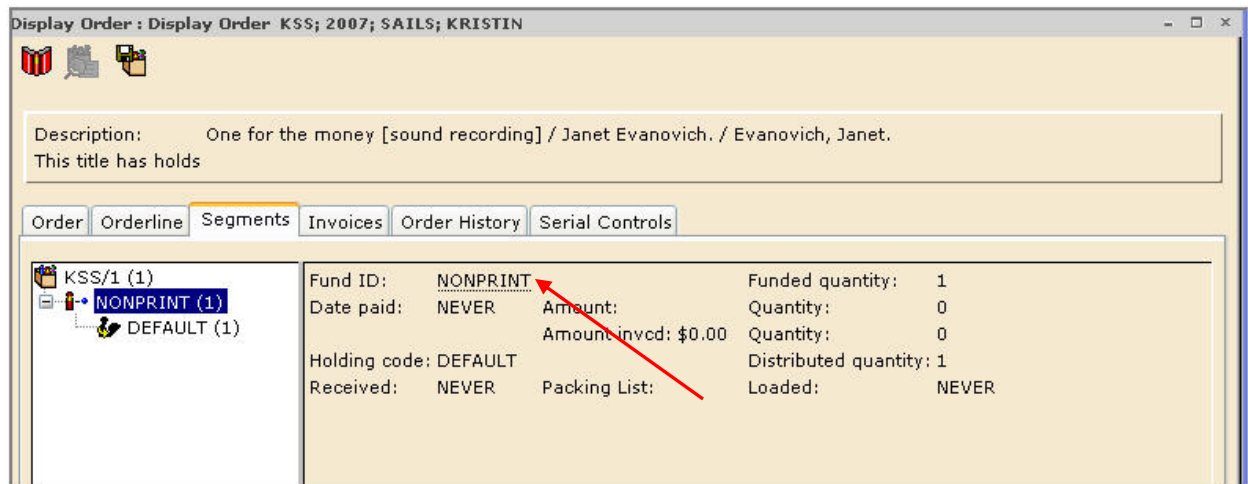- CTRL + V for paste

Current item

When using a wizard, the current item may appear, as shown in the following figure. Click the link to use that item information, when appropriate.
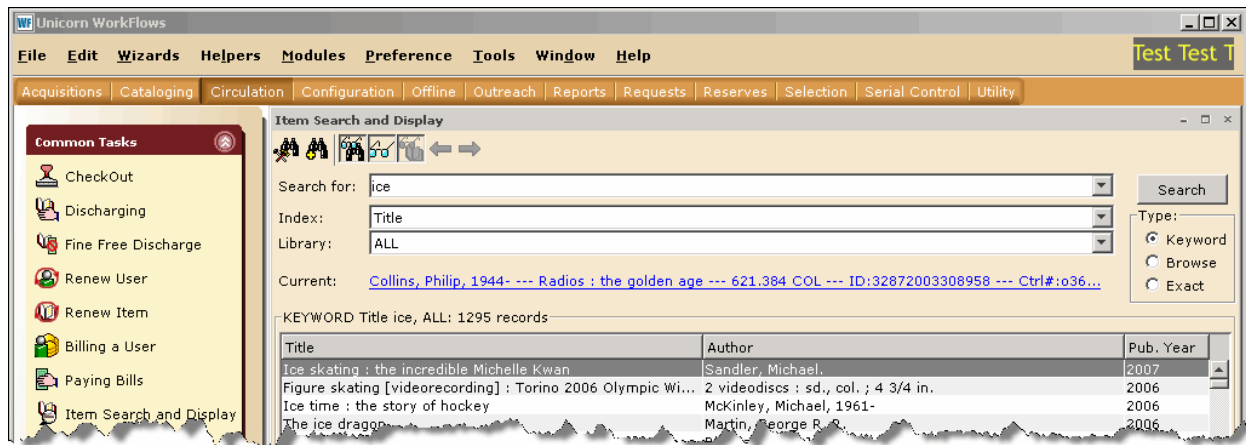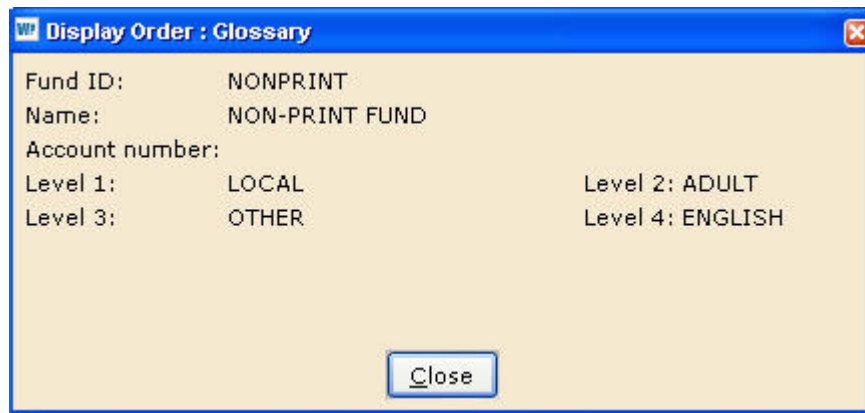
Glossaries

In some screens, Workflows lists information that appears with a dotted underline. When you click on the underlined entry, information about that entry appears.

In this example of an on-order record, you can click:

- on Fund ID to see the information about the fund (see figure below)

You can copy and paste fields from the glossary by clicking and dragging over the field and then using CTRL + C and CTRL + V.

Sorting

To sort a list of items, click the column heading. To sort the column in the opposite direction, click the column heading a second time.

In the following example, the records are sorted by publication year. To sort the list by Title, click on the Title column heading.
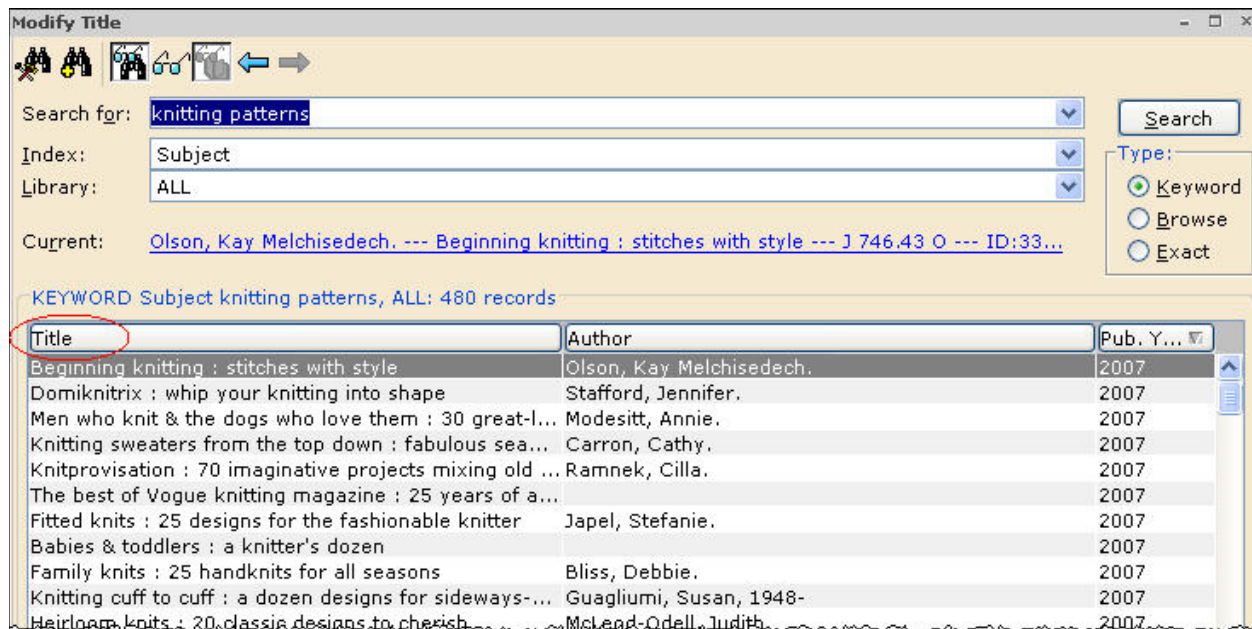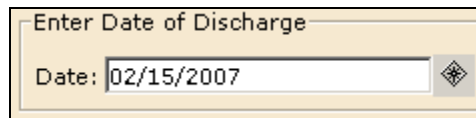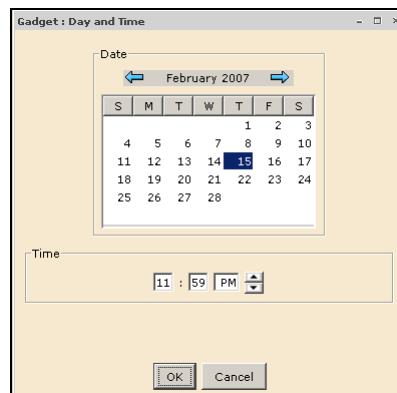

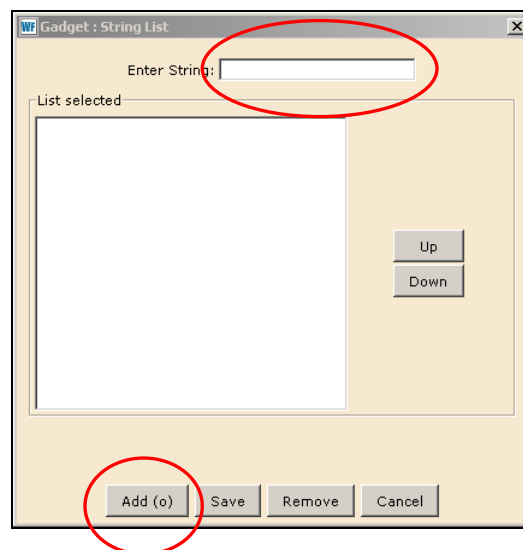After sorting, the results will appear as follows:
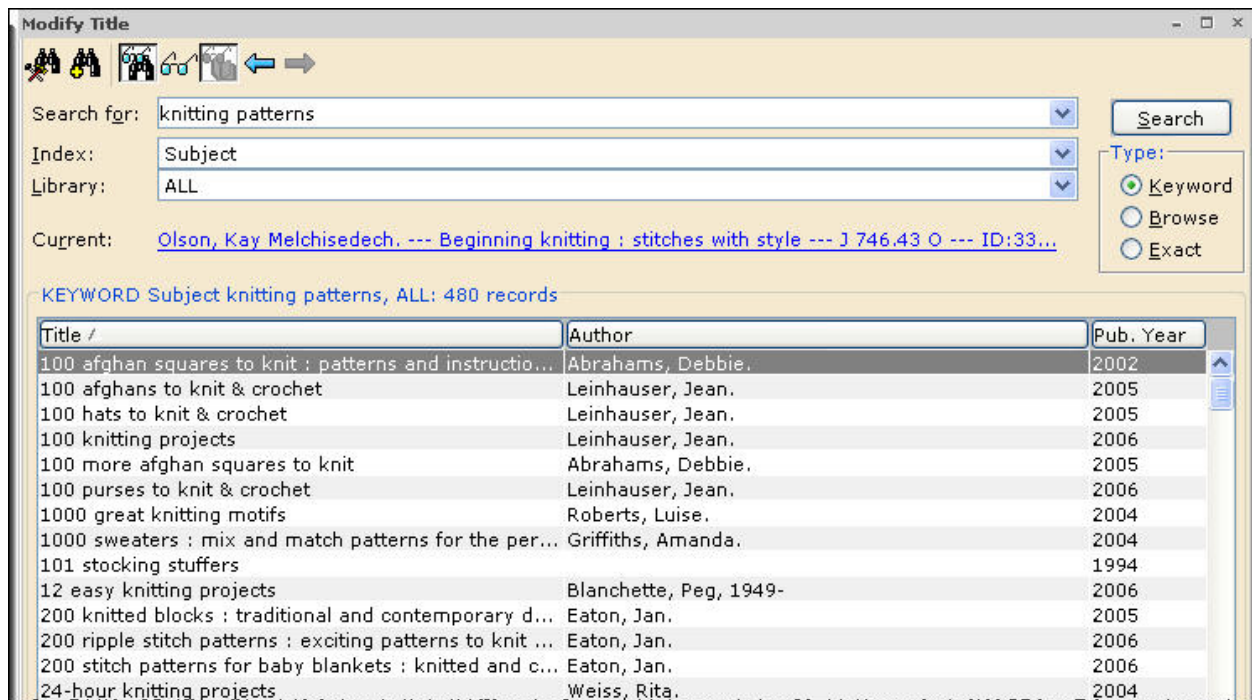
Gadgets

Gadgets help you enter the date, text strings, and field entries in the correct format.

For example, when you click the date gadget, the following screen appears in which you can select the appropriate date.

To use the gadget to enter text strings, such as when you create a receipt header or receipt footer for the date due slip:

1. Enter the text into the **Text String** field and click the **Add** button.

2. If you want, continue adding text as in step 1, then click **Save** when you finish.

To use the gadget to select field entries:
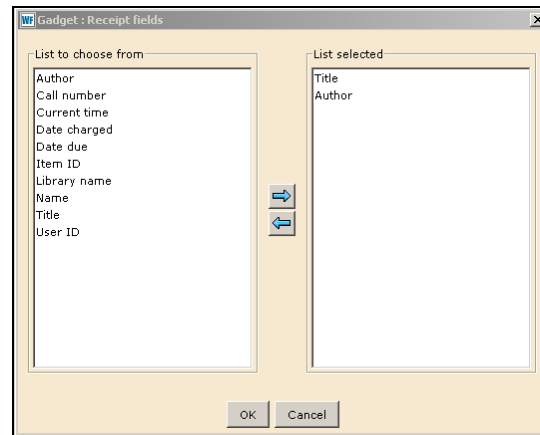
1. Click an entry in the list on the left, and click the right arrow to move the entry into the list on the right.

2. To remove an item from the list on the right, click the item and click the left arrow .

3. When you finish selecting entries, click **OK**.

Mapping function keys

You can change the function key or key combination that you use as a shortcut to access a wizard:

1. In the menu bar, select **Preference > Desktop > Current toolbar > Function key mapping**. The following screen appears:
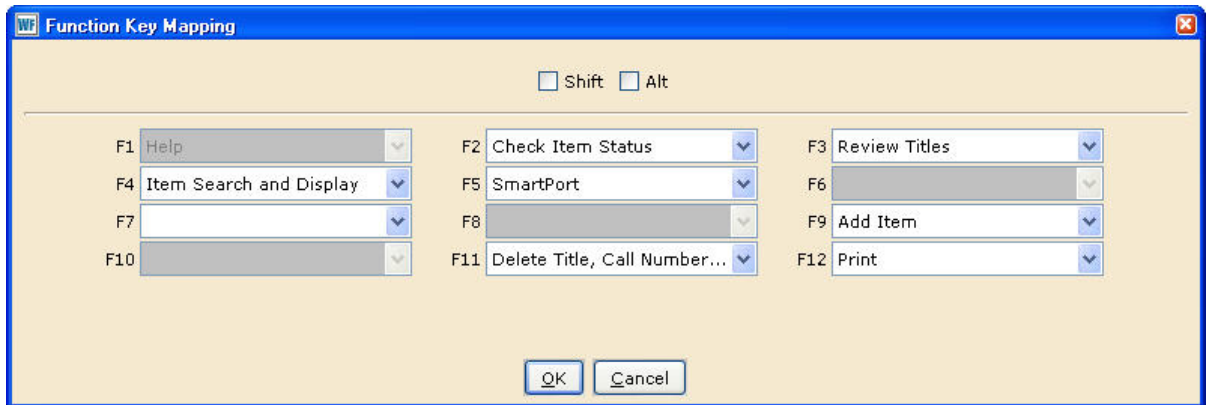
If you want to display more function options, check the SHIFT, ALT, or both ALT and SHIFT boxes. For example, when you check SHIFT, a screen such as the following appears:
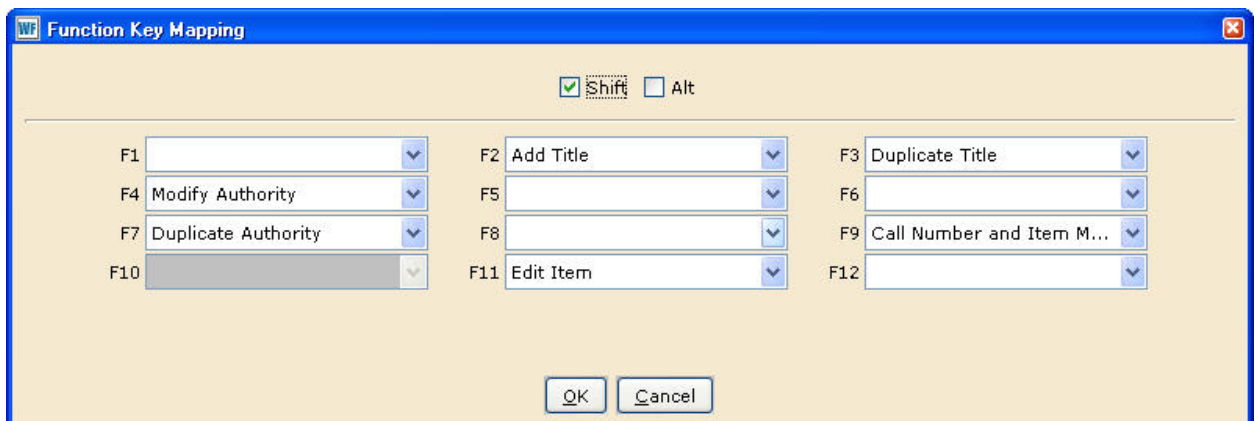

2. Click the down-arrow next to the field you want to change or add, and select the wizard you want for that function key. You cannot use the grayed out fields.

3. Click **OK**.

## Displaying more than one wizard at a time

To display more than one wizard at a time, such as the Item Search and Display and Modify Title wizards:

1. Click the Item Search and Display wizard in Common Tasks.

2. Click the Modify Title wizard in the Title group.

3. From the menu bar, select **Window > Horizontal**. The wizards appear as follows:
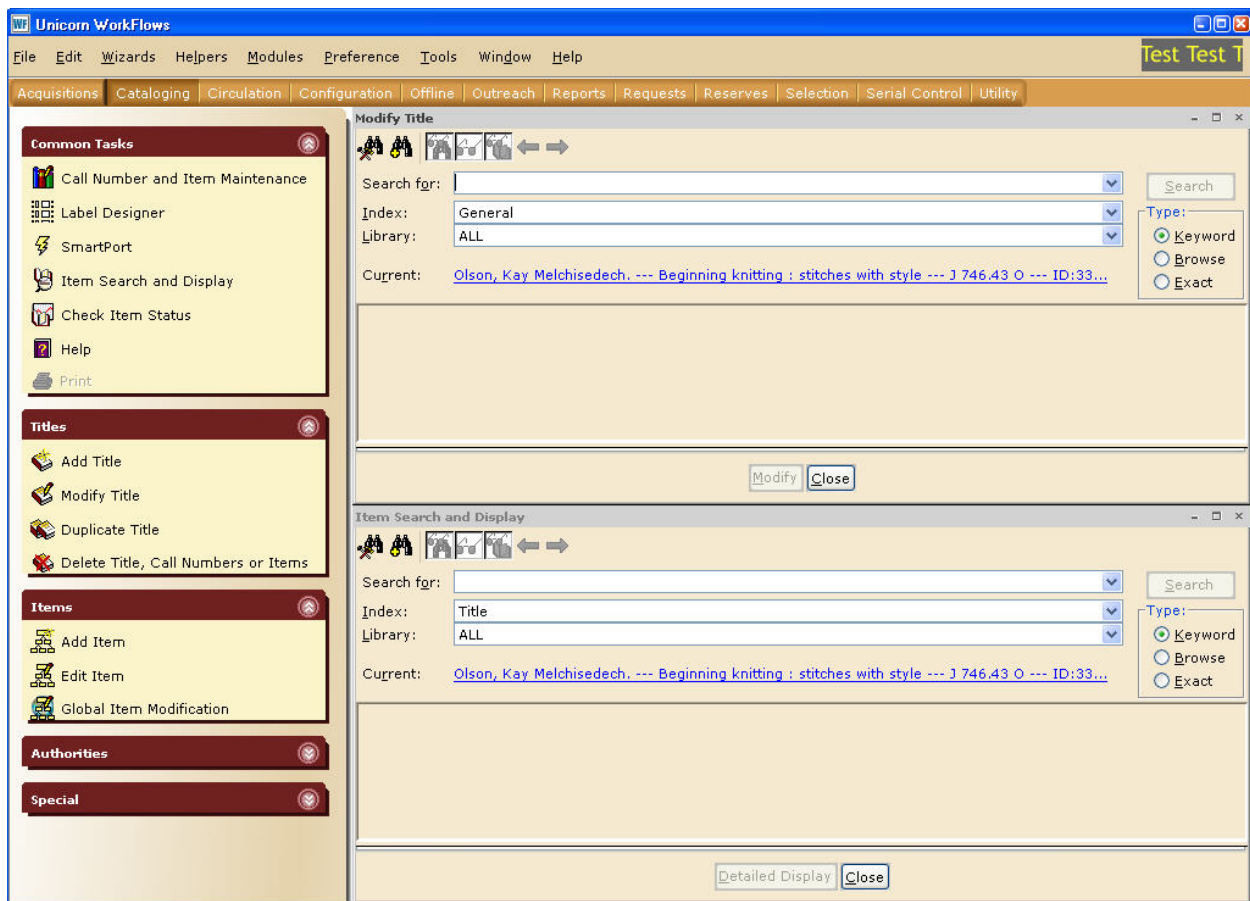

4. Each time you want to use one of the wizards, you must first click somewhere on the screen within that wizard.

5. You may try other arrangements of the wizards by selecting **Tile**, **Cascade**, or **Vertical** under the **Window** menu option.

Call Number and Item Maintenance
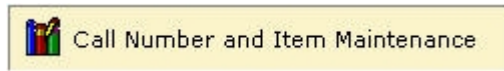
The Call Number and Item Maintenance wizard is used to add new call numbers and items, or to modify call numbers and items already in the catalog. Instead of two separate wizards, Add Call Numbers and Edit Call Numbers they have been combined into a single wizard.

1. Click on the Call Number and Item Maintenance wizard. The item search window will open.
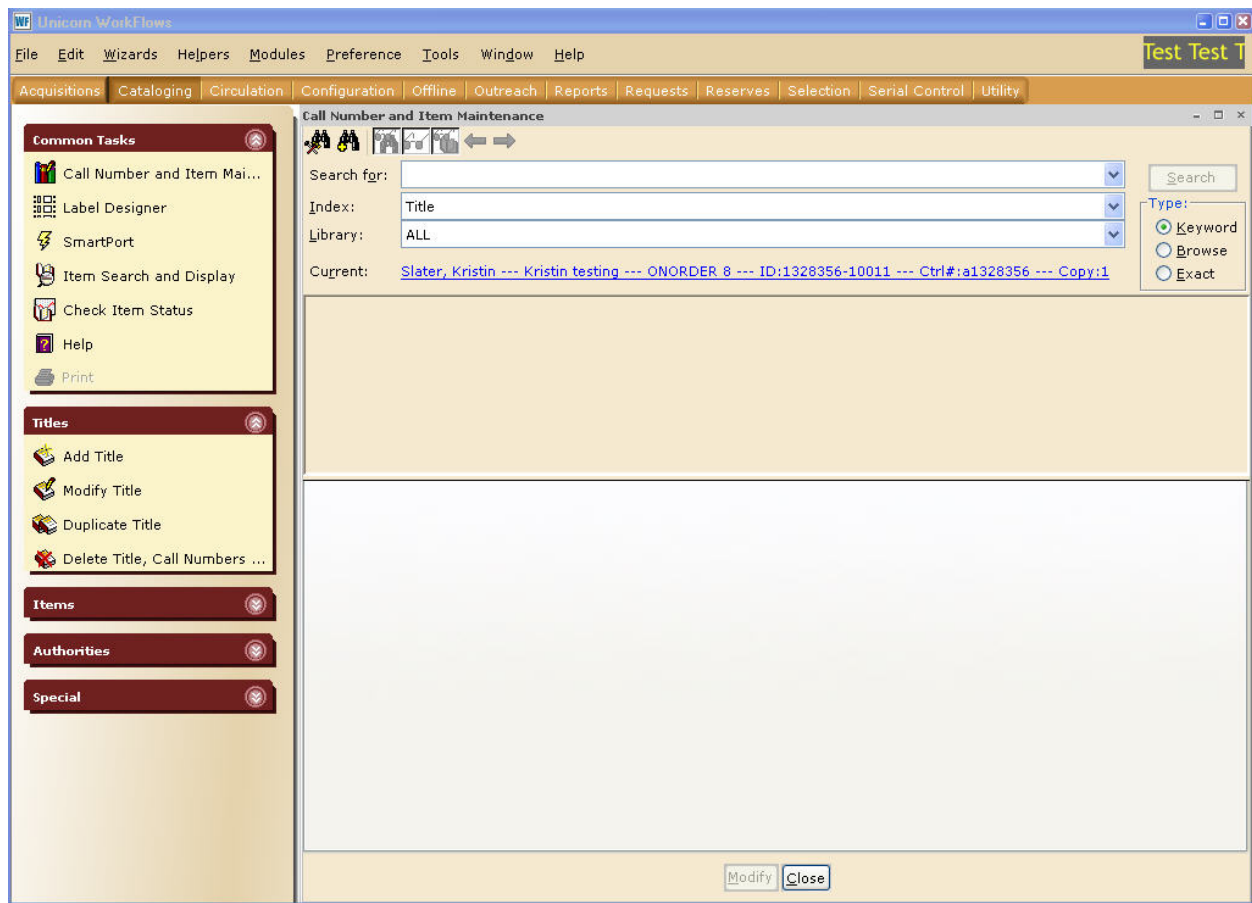
2. Search for the record you wish to modify.

    If your search finds more than one record, a list of matching records displays in the hit list area. If you have the viewer turned on then the selected record will display at the bottom of the screen.

3. Search results screen.

4. Highlight the record you wish to modify. Click **Modify**.

If you do not have a Call Number or copy on this record another library's copy information will display.

If you have a Call Number then your Copy information will display.

5. Click **Add Call Number.** A new Item information screen will open with your library, home location, item type, and etc.

6. To Edit any of the Item Information, click on any of the fields and edit the information. **Do not click on Add Item or Add Call Number. These options will either add another item or a new call number to this record.**
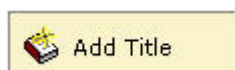
7. Click **Save**

To edit the Call Number information, click on your Call Number in the Call Number display pane.

Call Number Information edit screen.

8. Make any changes to the call number. Click **Save.**

9. To add another **Call Number (not copy)** then Click **Add Call Number**.

10. To add another copy. Click **Add Item.**

Add Title Wizard

The Add Title wizard is used to create a new bibliographic record and associated call numbers and items. Use this wizard to create your library's request records, magazine records and museum pass records.

To create a **Request Record**, use the **MARC-00 format**.

To create a **Magazine Record**, use the **SERIAL-00 format**.

To create a **Museum Pass Record**, use the **MUSEUMPASS format**.

1. Click on the **Add Title wizard**. The Bibliographic tab will open. If the properties page appears first, click OK. In this example, the MARC-00 format is being used.

The window will always open with the LCCN tag highlighted.

2. Click on the Contents column of the field in which you want to enter data. This field will now be highlighted.

All data should be entered in the Contents column.

You can use the Tab key to move forward through the record or you can just click on the Contents column of the field.

3. Enter the information as it appears on your item in the appropriate fields of the request record.

Add Title

REQUIRED FIELD

Control | Bibliographic | MARC Holdings | Call Number/Item

☐ Shadow title

..	Label	Tag	Ind.	Contents
▾	LCCN	010		
▾	ISBN	020		0123456781
▾	ISBN	020		
▾	ISSN	022		
▾	UPC	024	1	
▾	Music No.	028		
▾	Music No.	028		
▾	Personal Author	100	1	Slater, Buddy
▾	Title	245	1	Buddy's guide to poker.
▾	Edition	250		7th ed.
▾	Publication info	260		Middleboro, MA : Cat Paw Productions, c2008.
▾	Physical descrip	300		457 p. : col. ill. ; 23 cm.
▾	General Note	500		
▾	General Note	500		
▾	Contents	505		
▾	Performer	511		
▾	Added author	700		
▾	Marc Request Date	948		HNT06/6/07

Save | Add Another Title | Add Holdings | Modify Holdings | Add Call Number | Add Item | Delete | Close

4. After all the data has been entered, click on the Call Number/Item tab to enter your copy information.

If you click Save instead of the Call Number/Item tab, a message window will pop up stating: The Item ID is required. Please enter a valid Item ID. Click OK.

The Item Information screen will open.

5. Edit any of the item information that needs to be updated. If the item is a set or contains more than one piece, enter this information in the **CIRCNOTE** (This note will appear when the item is checked in or out.).

6. Enter the Item ID and c**lick Save**. A message window will pop up stating: Please enter the call number. Click OK. The Call Number information screen will open.
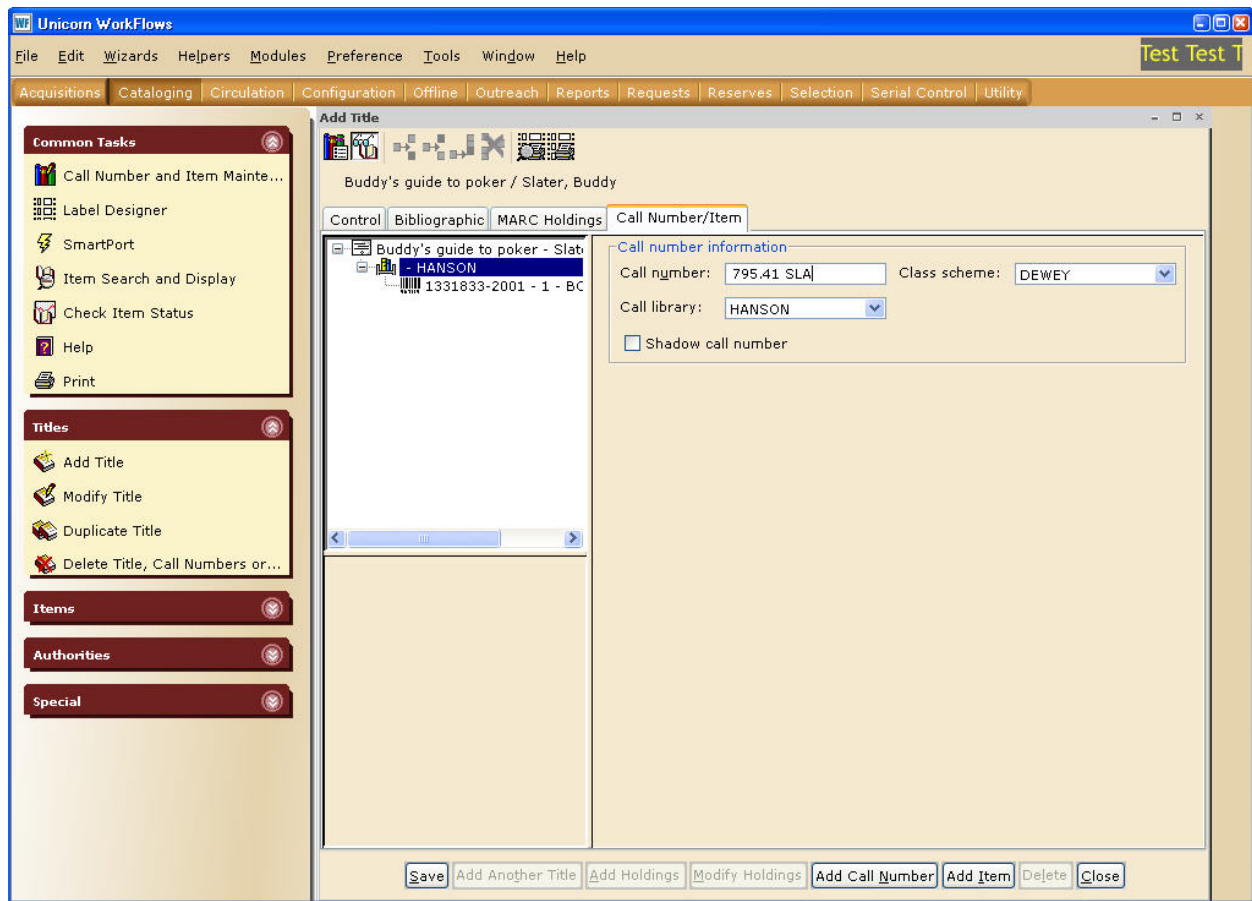
7. Enter your call number and then click **Save.**

8. Once the record has been saved, the following options will be listed:
   Add Another Title
   Add Call Number
   Add Item
   Close

Modify Title Wizard
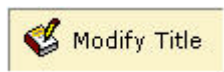
The Modify Title wizard is used to **update ACQ (on-order) records** as well as your library's **SERIAL-00 (magazine) records and Museum Pass records**.

Changes should *not* be made to full MARC records.

1. Click on the **Modify Title wizard** and search for the record you need to modify.
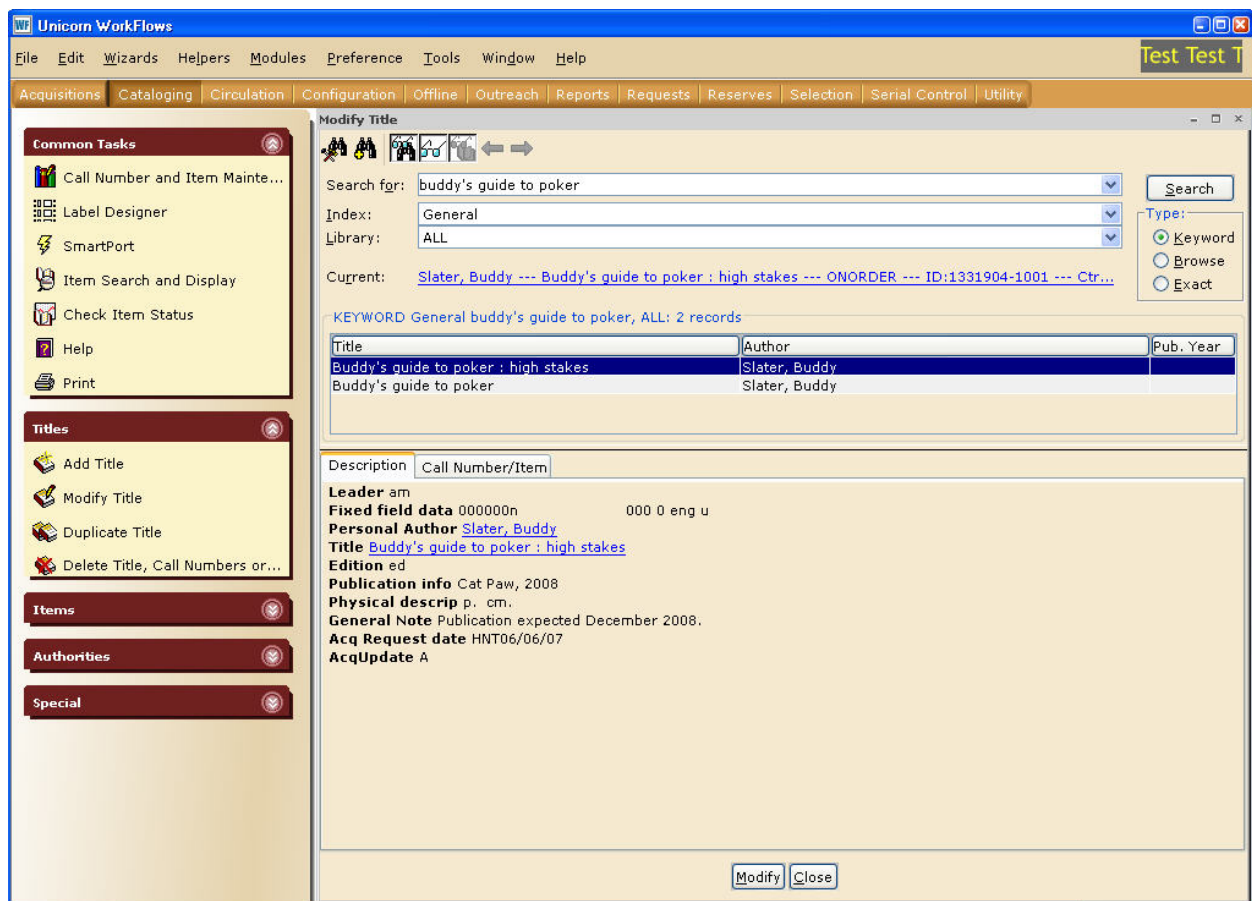
2. Highlight the record that you need to Modify and click **Modify.**
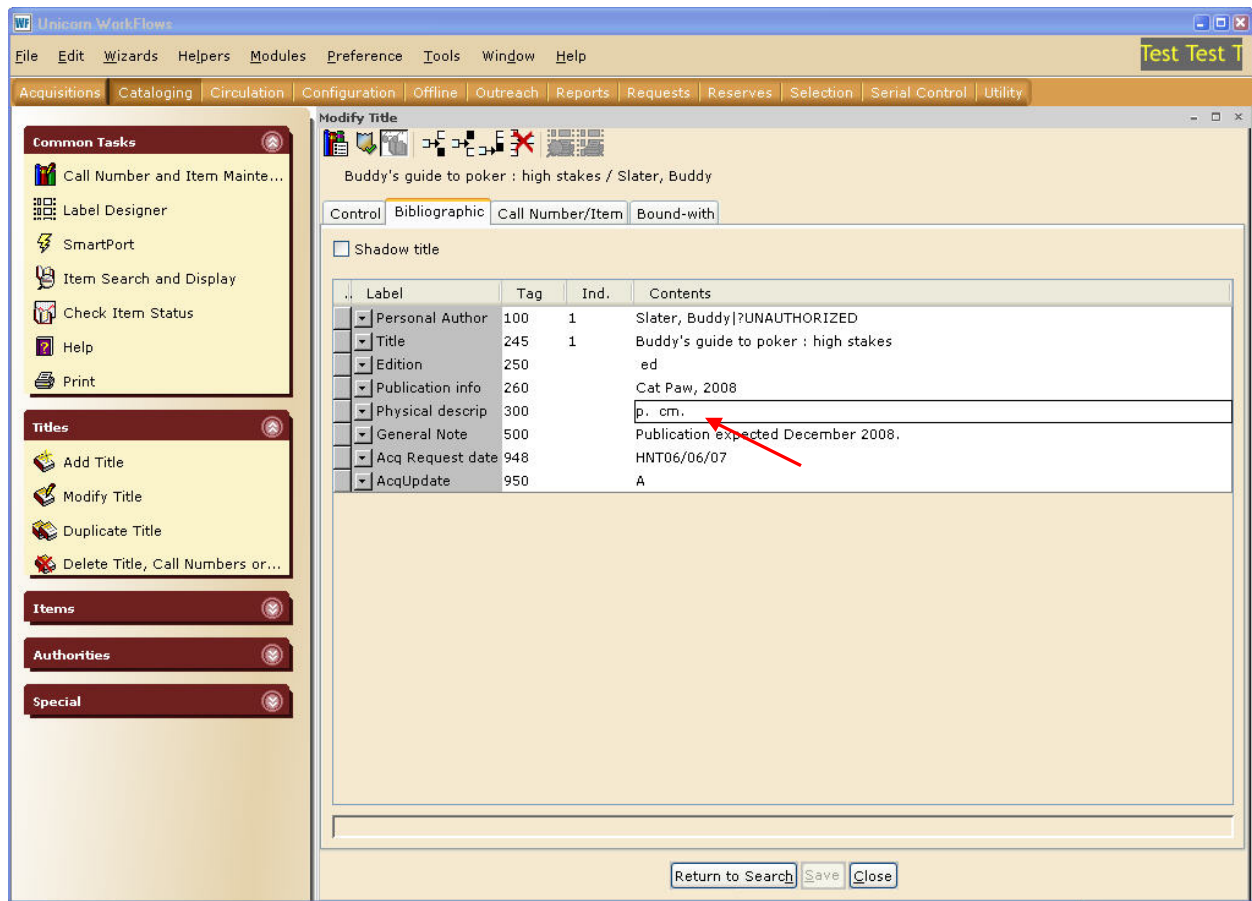
3. Click on the Contents column of the field you wish to Modify. Once the field has been highlighted, you can enter the information in that field.

In this example of an ACQ (on-order) record, the column of the physical description field is highlighted. The pages can now be entered in this record.
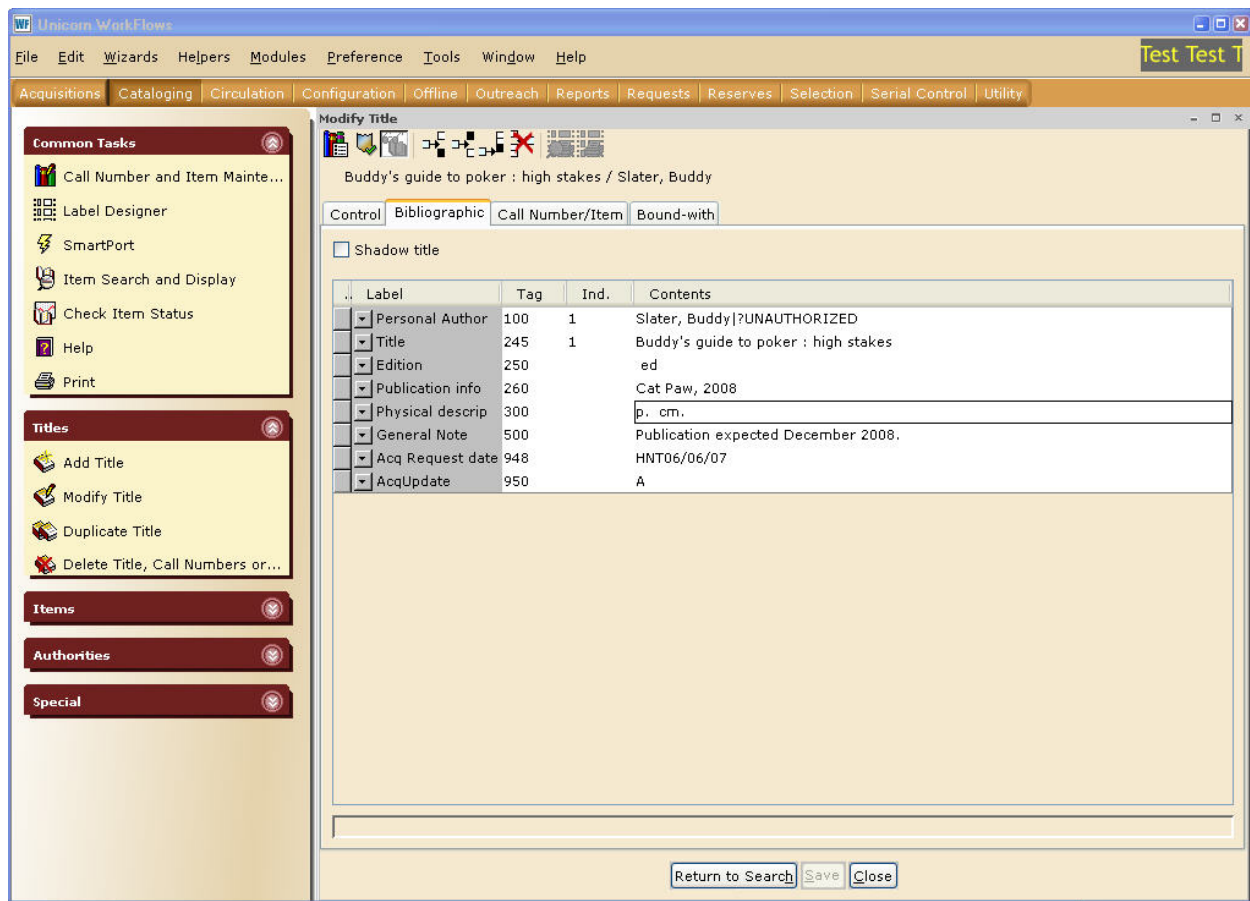
4. When you have completed editing the record, click **Save.**

5. If you need to edit your call number and copy information, click on the Call Number/Item tab**.**

   You cannot add a Call Number when modifying a title. You must use the Call Number and Item Maintenance wizard.

Adding Fields When Using the Add Title or Modify Title Wizards

Add Before

To add a field before the current one, do the following:
- Select the field immediately below where you want to add the new field, then click the **Before** helper.

  Or, right-click to open the shortcut menu and click **Add Field Before**.

- You must also type the tag number of the field that you have added.

Add After

To add a field after the current one, do the following:
- Select the field immediately above where you want to add the new field, and then click the **After** helper.

  Or, right-click to open the shortcut menu, then click **Add Field After**.

- You must also type the tag number of the field that you have added.

Deleting Fields

To delete a field, do the following:
- Select the field you wish to delete and then click the **Delete** Helper.

  Or, right-click to open the shortcut menu, and then click **Delete Field**.

Appending Fields

In addition to adding fields, you can also append a field to a record. When you append a field to a record, Unicorn adds the new field at the end of the record.

- Position the insertion point anywhere in the Editor window, then click the **Append Field** helper.

  Or, right-click anywhere in the Editor window to open the shortcut menu, then click **Append Field**.

- You must also type the tag number of the field that you have added.

- Unicorn adds the new field at the end of the record.

Delete Title, Call Numbers, or Items Wizard
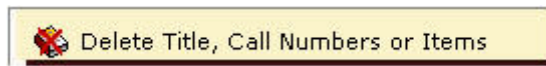
The Delete Title, Call Numbers or Items wizard is used to remove a title, call numbers, or items from the catalog.

1. Click on the **Delete Title, Call Numbers, or Items wizard**. The search window will open. Search for the title that you wish to delete.
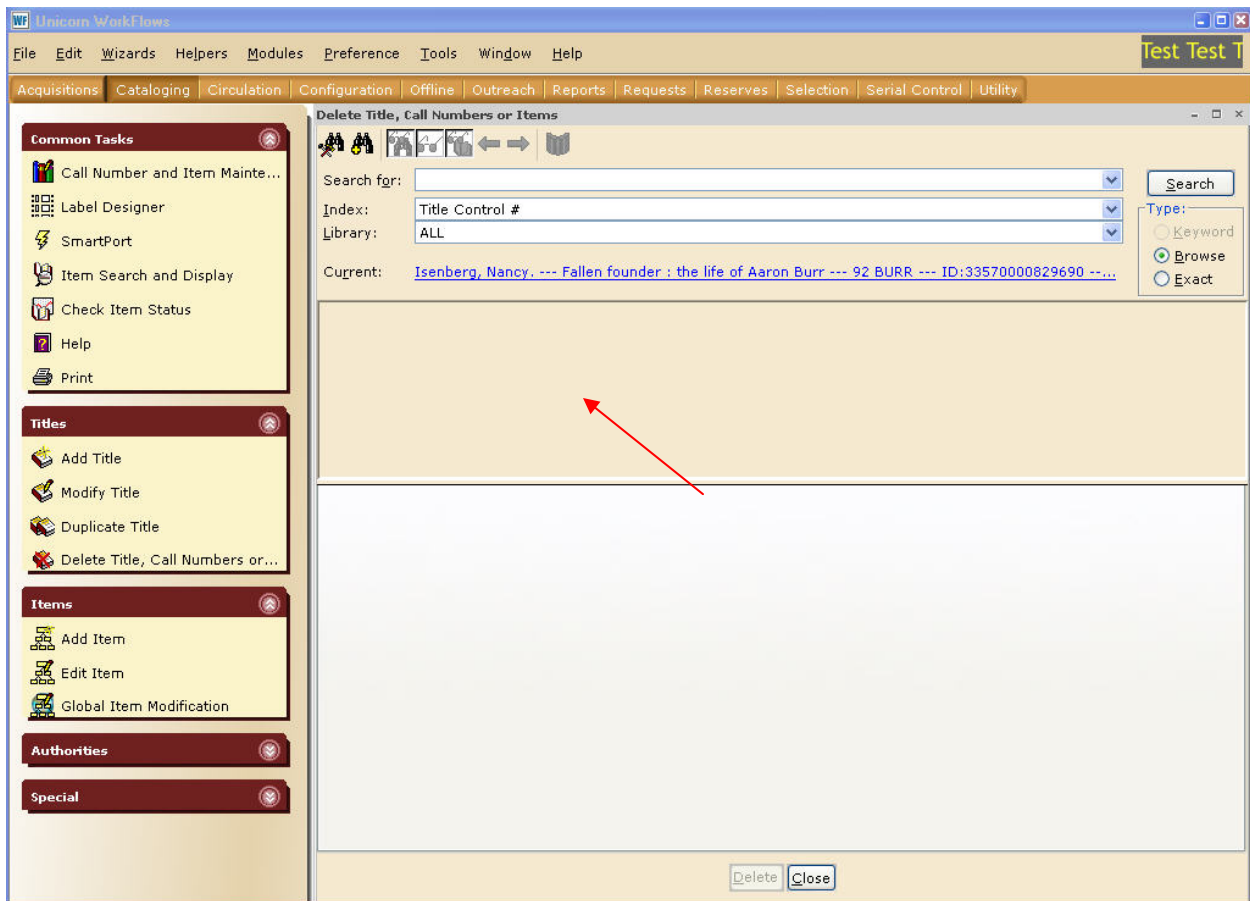
2. If there is more than one record, the list will display in the hit list area. Select the record you want to display and the call numbers/Item tab will open in the record display area.

The Call Number/Item tab displays in a tree structure of the title, call numbers and copies. You will only be able to delete your library's call number and copies.

3. To delete a call number and copy, check the box next to the call number you wish to delete. The call number and copy information both have a check and they will now be in bold and italics, making it easier to identify what you have chosen to delete.

4. Click Delete

To remove the title and all of the copies, check the box next to the title. The title will display in bold and italics.
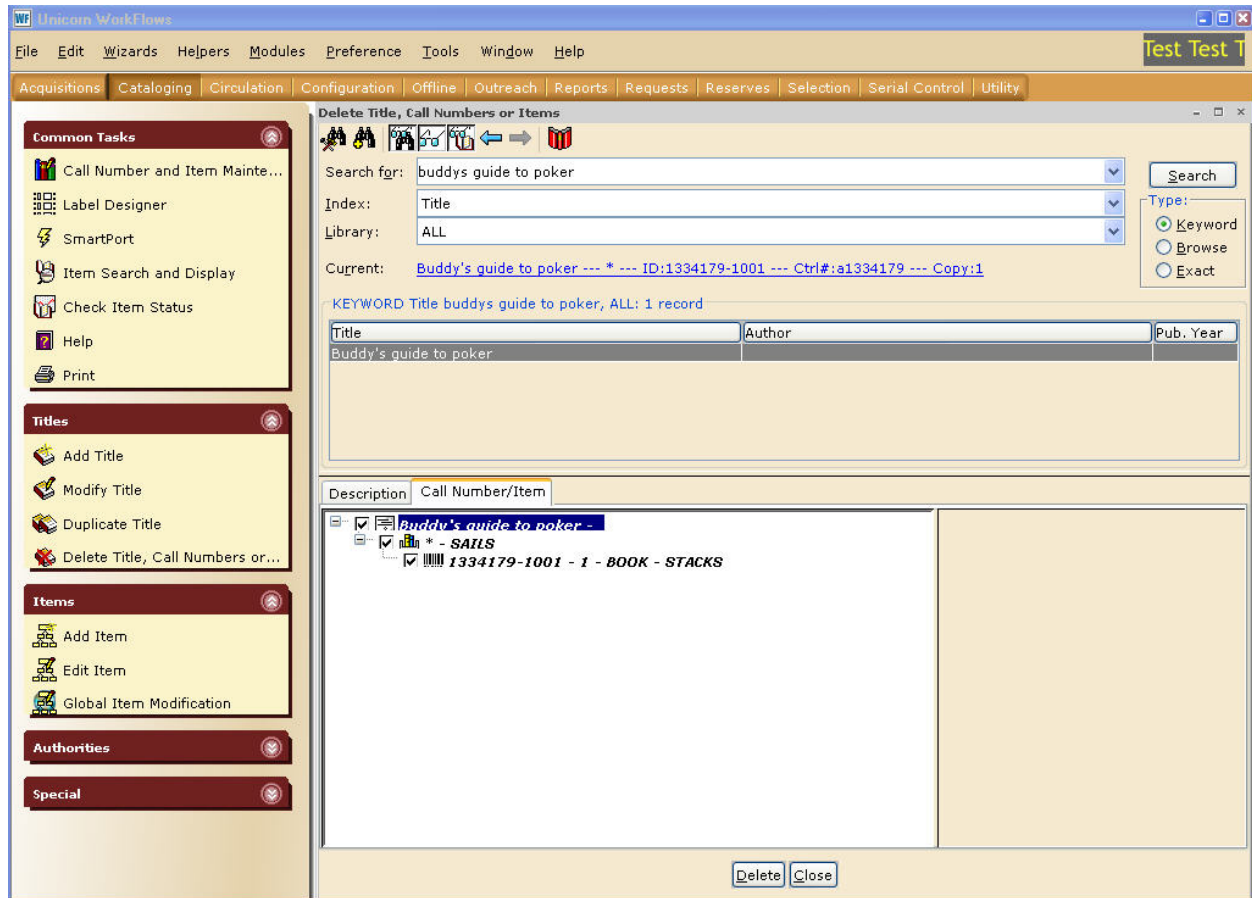
5. Click **Delete.** A message window will pop up stating: This action will remove the title. Would you like to remove the title?

6. Click **Yes.**
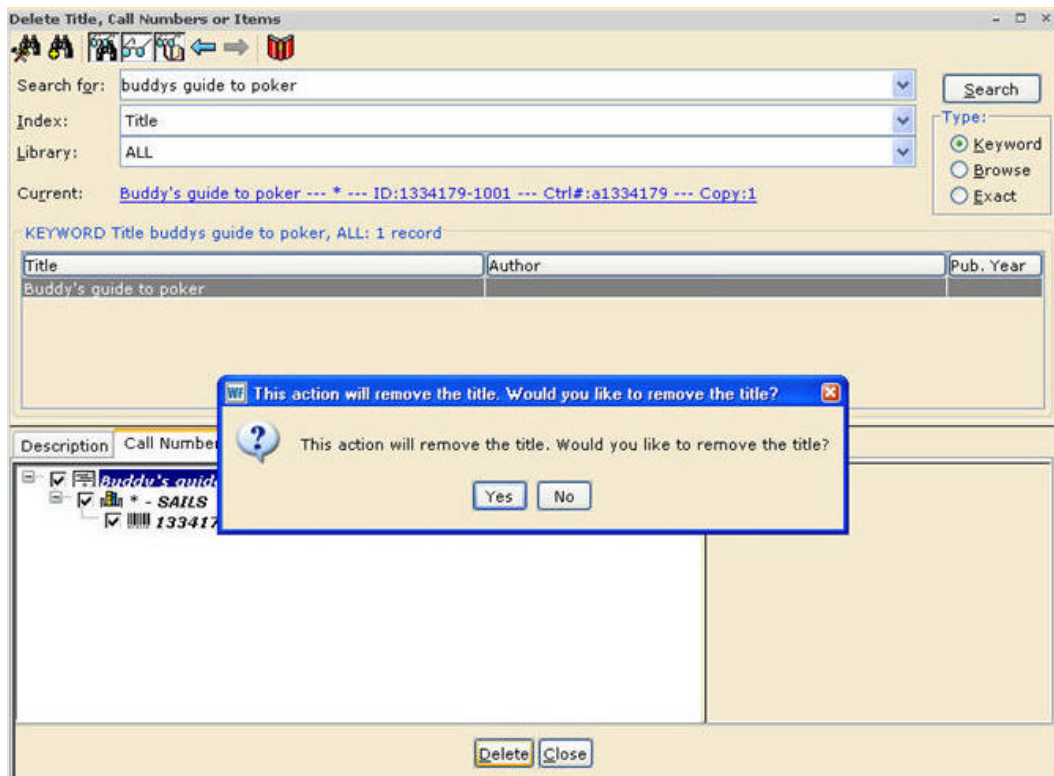
7. After clicking yes, you will return to the search window. In the hit list area, you will see Unavailable for display for the record that was just deleted.
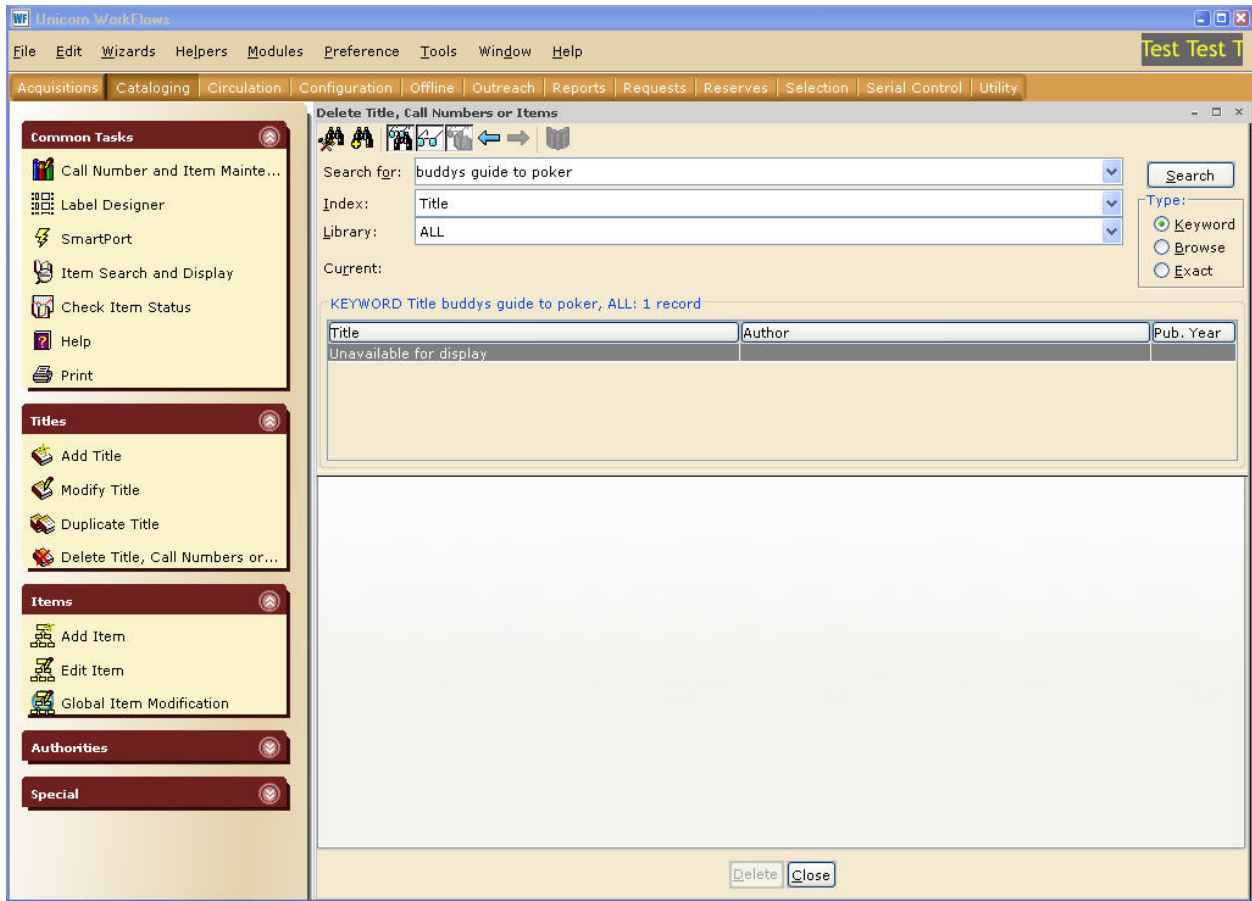
8. Click **Close** or search for another record to delete.

Add Item Wizard
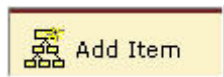
The Add Item wizard is used to add a new item to a bibliographic record. You must already have a call number attached to the record in order to use the Add Items wizard to add a new copy.

1. Click the **Add Item wizard**. Search for the record to which you want to add an item record (or copy).
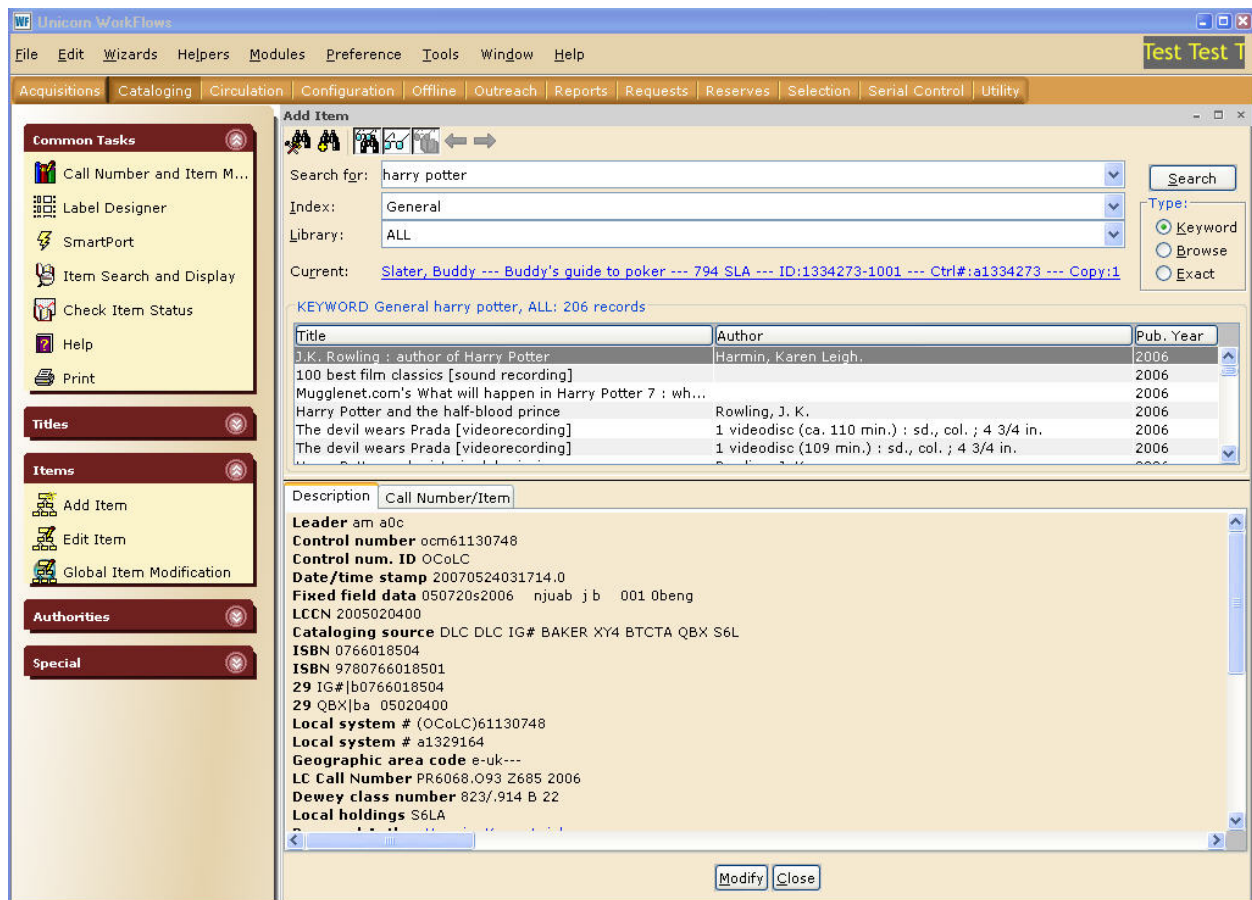
2. Select the record to which you want to add a copy. **Click Modify.**

The Call Number/Item tab will open. Make sure that your library's copy (the Item ID) that is already in the system is highlighted.
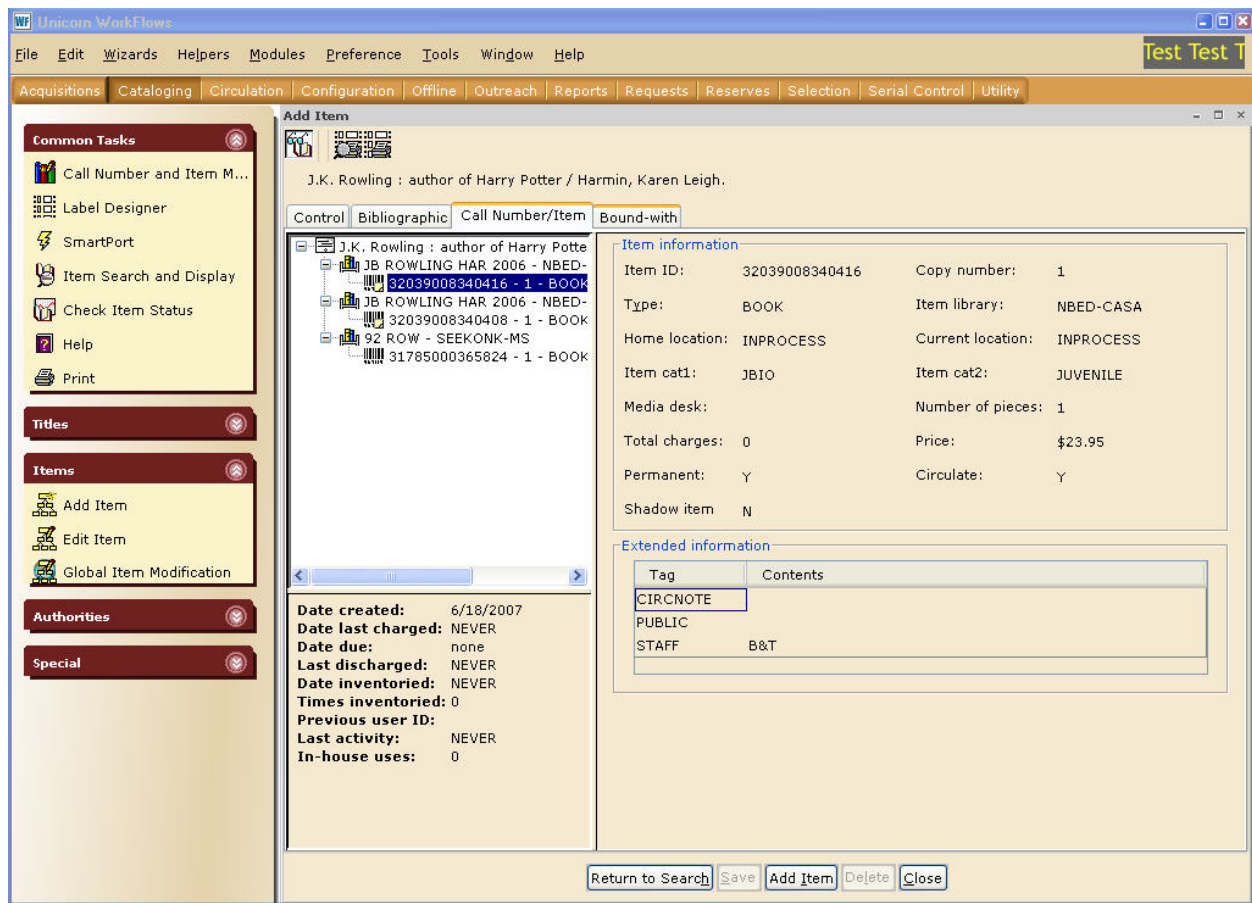
3. Click **Add Item**.
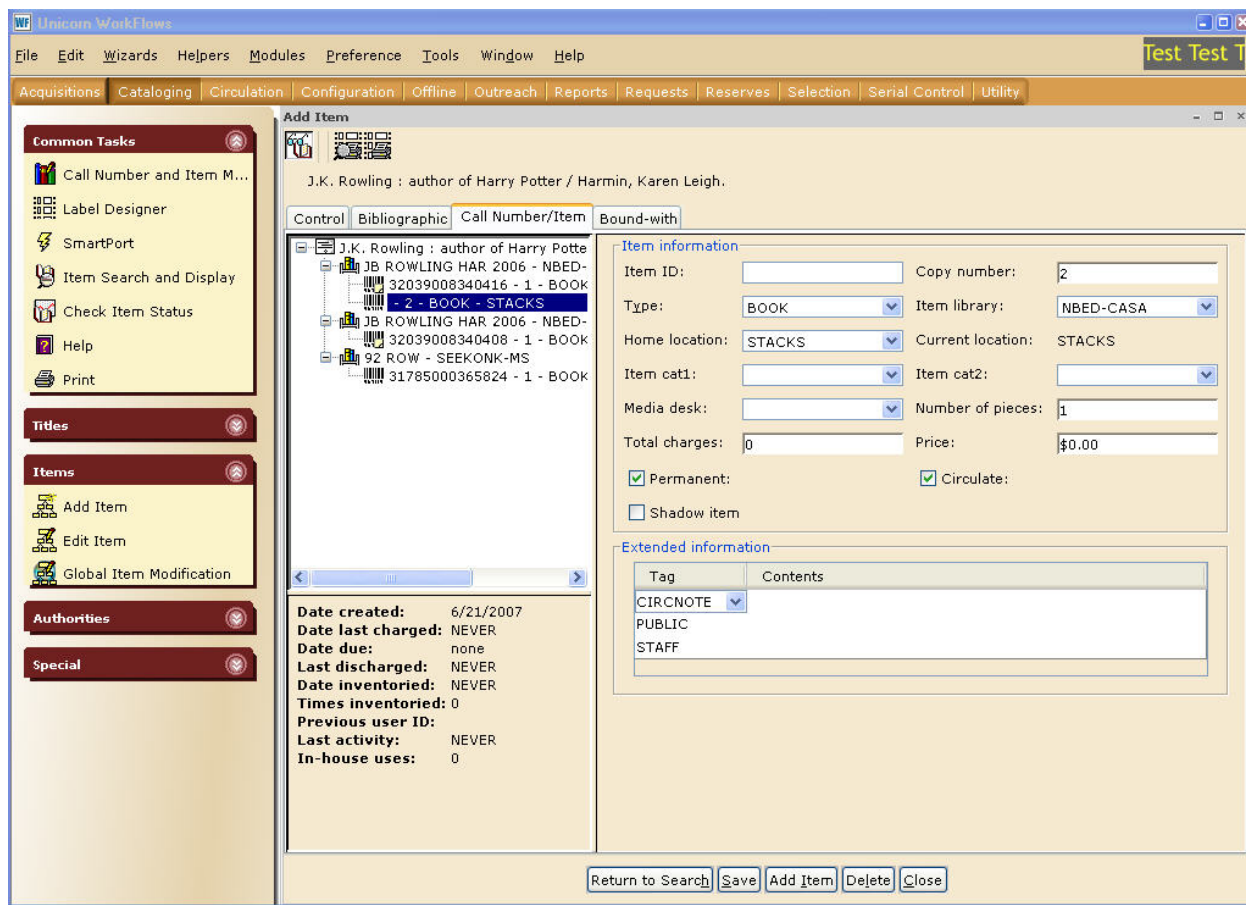
4. Add your Item ID. Edit any of the other copy information.

5. Click **Save**. Do not click Add Item. This option adds another copy to the record and does not save the one you are currently working on.
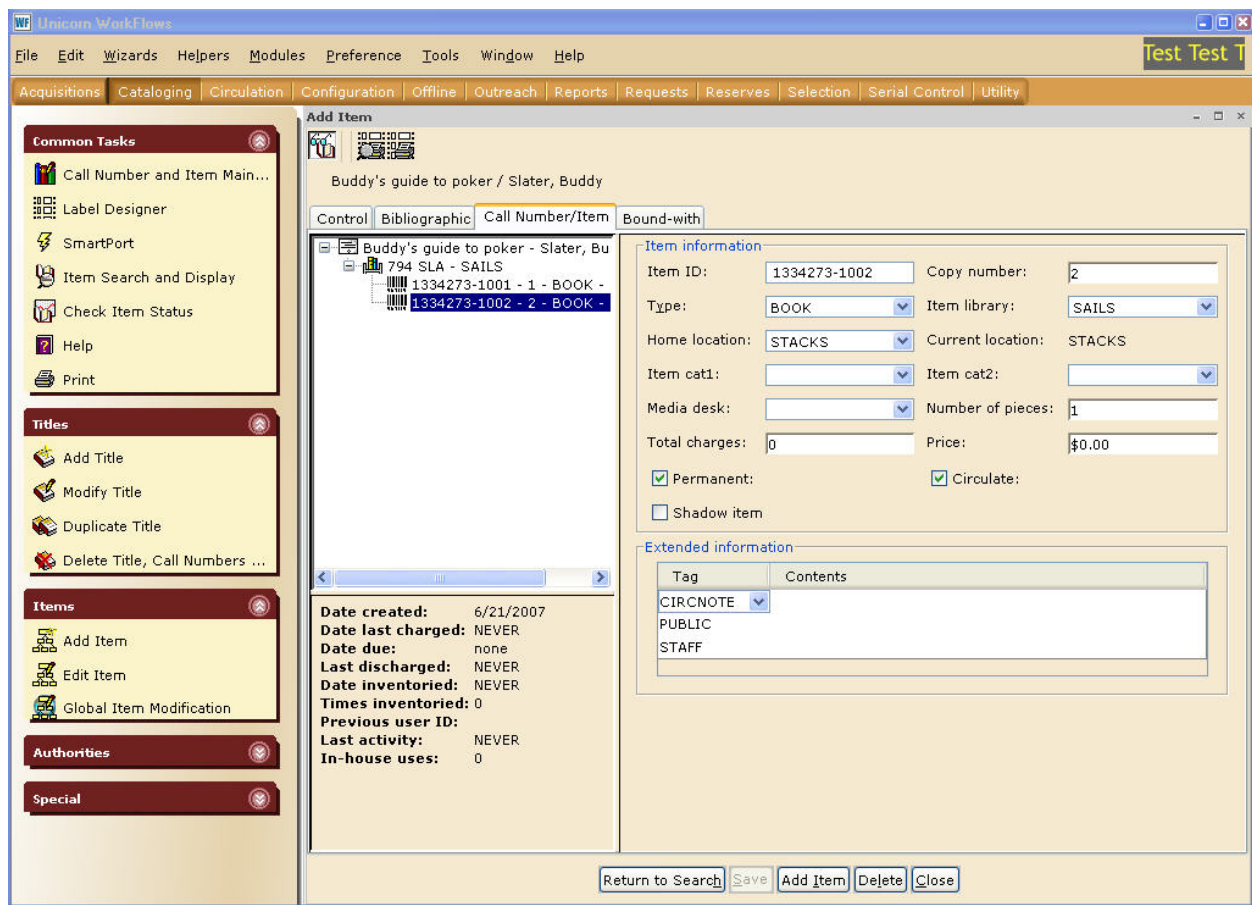
If you made a mistake when adding this new copy, you can use the **Delete button** to remove it. This option will only work on the newly created item(s).

6. After adding an item, click one of the following options:

    Return to Search - click to return to the search screen.
    Add Item - click to add another item to this record.
    Delete - click to delete item records created during the wizard session
    Close

Edit Item Wizard

The Edit Item wizard is used to modify individual items (or copies) of a title.

1. Click the **Edit Item wizard**. The search window will appear. Search for the item you wish to modify.

2. Select the record for the copy (or copies) you want to edit. Click **Modify**.
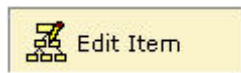
The Call Number/Item tab will open. Make sure that your library's copy that is already in the system is highlighted.
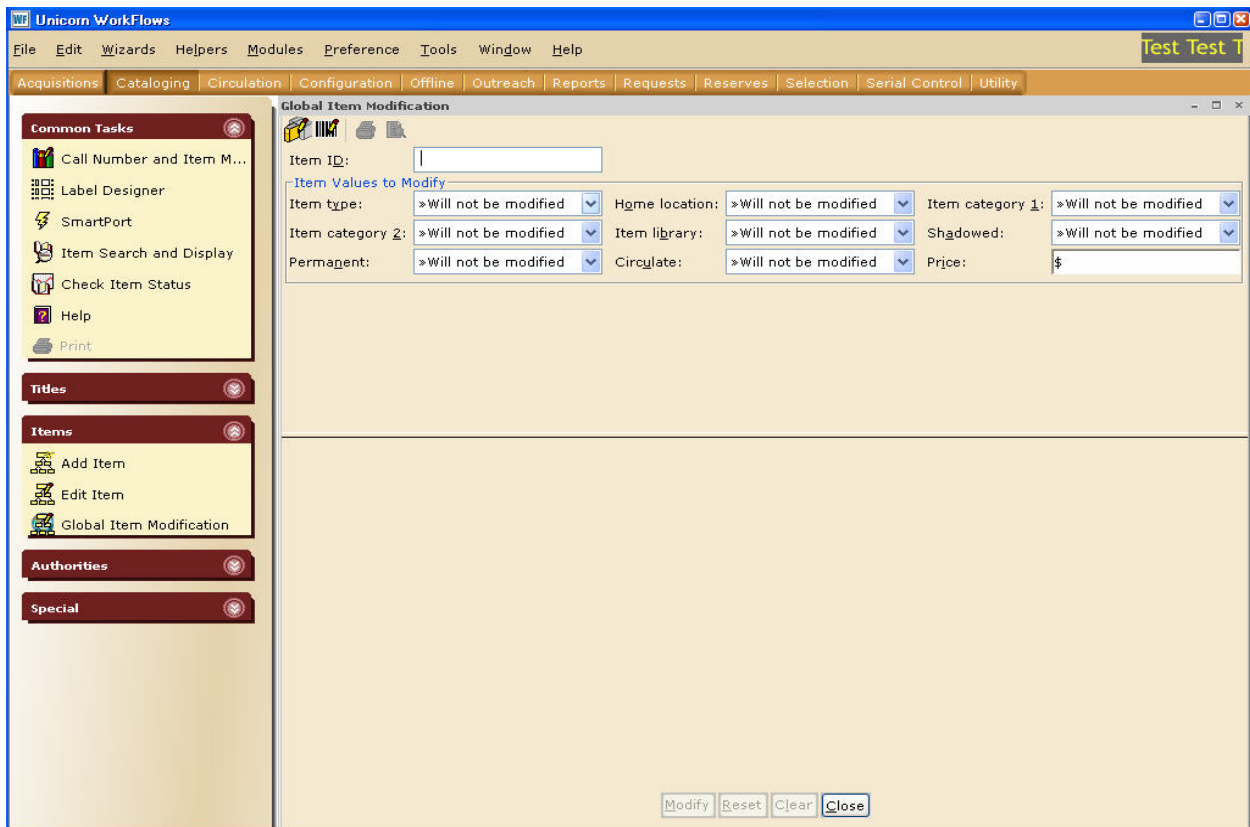

3. Modify any of the copy fields.

4. Click **Save.**

5. If you need to modify another item, click **Return to Search**. If you are finished, click **Close.**

Global Item Modification Wizard

The Global Item Modification wizard allows you to create a template of changes to be made to selected items and globally apply these changes by scanning the IDs of all the selected items.

1. Click on the **Global Item Modification wizard**.
2. Under **Item Values to Modify,** make any needed changes to the item value fields by selecting a new policy value from the drop-down list. To reset the item values, click **Reset**.
3. In the **Item ID** box, type or scan each item's ID that you want to modify.

4. If you do not know the item ID, use the Modify Selected Items helper to search for items by title, and then select the items you want to modify.

Administration Functions

Toolbar Manager

A toolbar file contains groups of wizards. By default, toolbar files such as Circulation and Cataloging appear in the toolbar. When you create a local toolbar file that file will also appear in the toolbar.

The WorkFlows administrator can manage toolbar files for all users by:

- creating and modifying toolbar files,
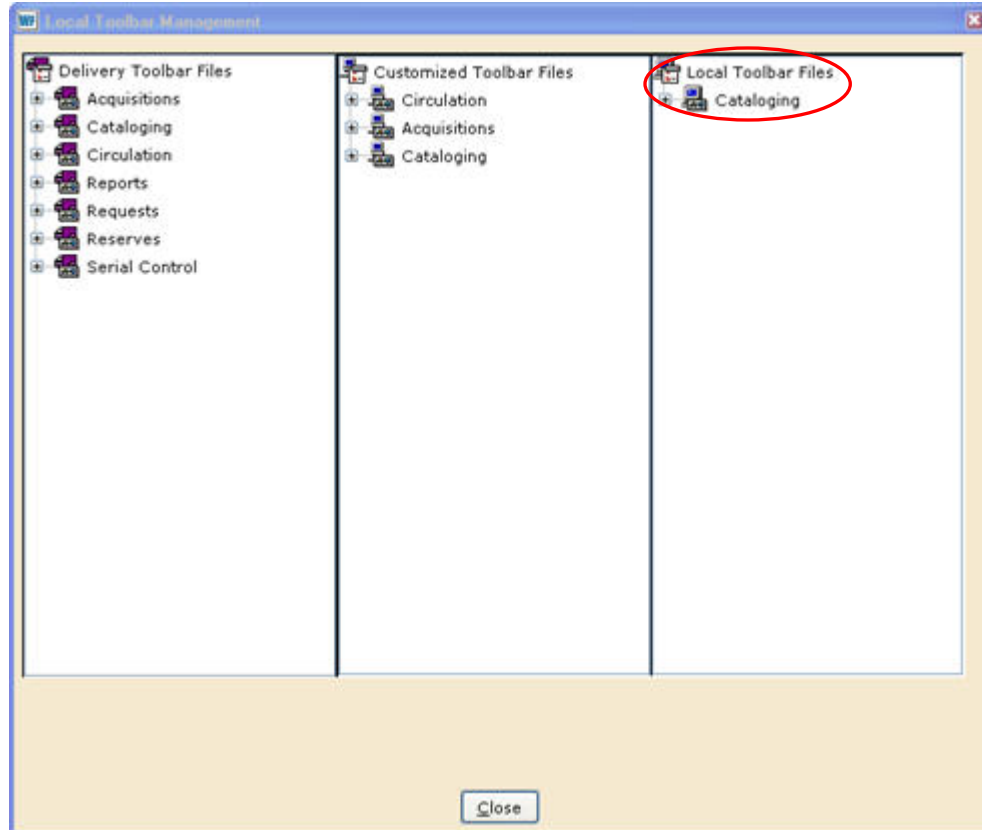- adding and removing wizards and wizard groups, and
- mapping wizards to function keys.

Creating toolbar files

To create a new toolbar file as well as to add or remove wizards:

1. From the menu bar, select **Preference > Desktop > Current Toolbar > Local Toolbar Management**.

   The following screen appears:

2. Right-click Local Toolbar Files and click **Add Toolbar**.

3. Enter a file name for the toolbar and click **Save**.

4. In the resulting screen, enter a description and click **OK**. The description will appear in the menu bar in WorkFlows.

5. Under Customized Toolbar Files (the middle pane), click the box to the left of Cataloging to expand the Cataloging files.
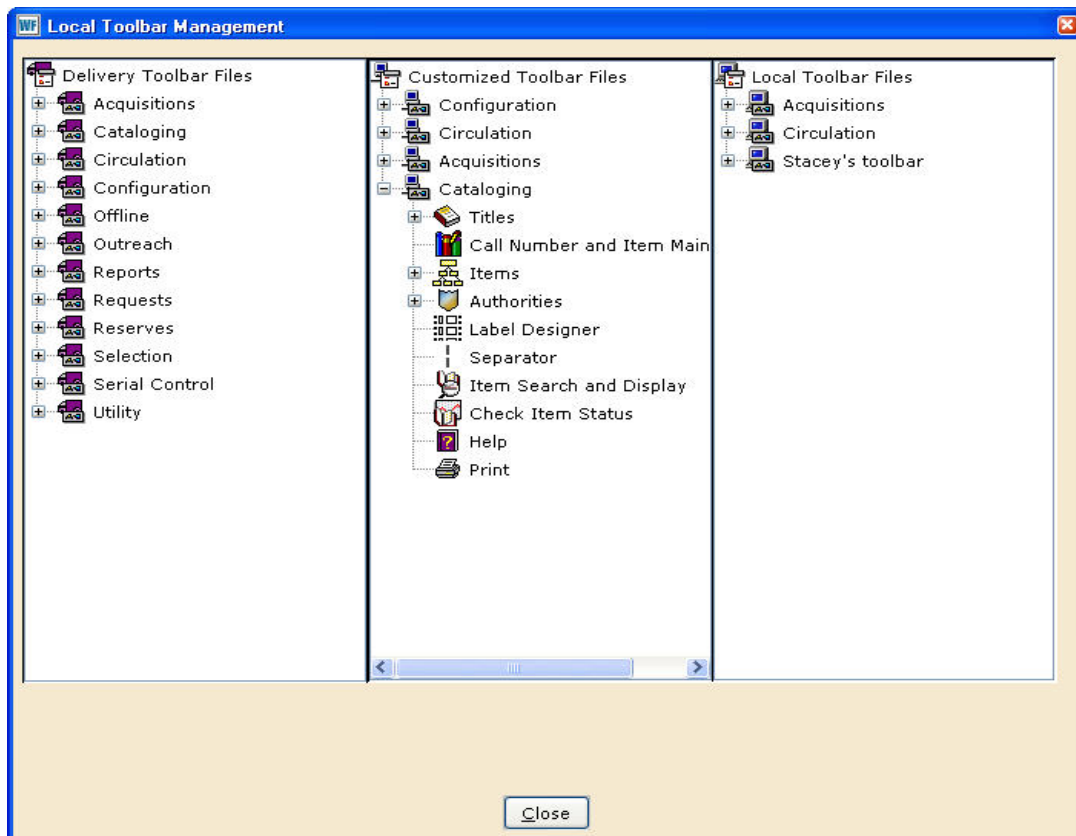
6. In the middle pane, right-click a wizard or a group of wizards and click **Copy to Local**.

7. Right-click where you want to copy the wizard and click **Paste**. For example, in the screen above, right-click **Stacey's toolbar** and click **Paste.** The following screen appears:
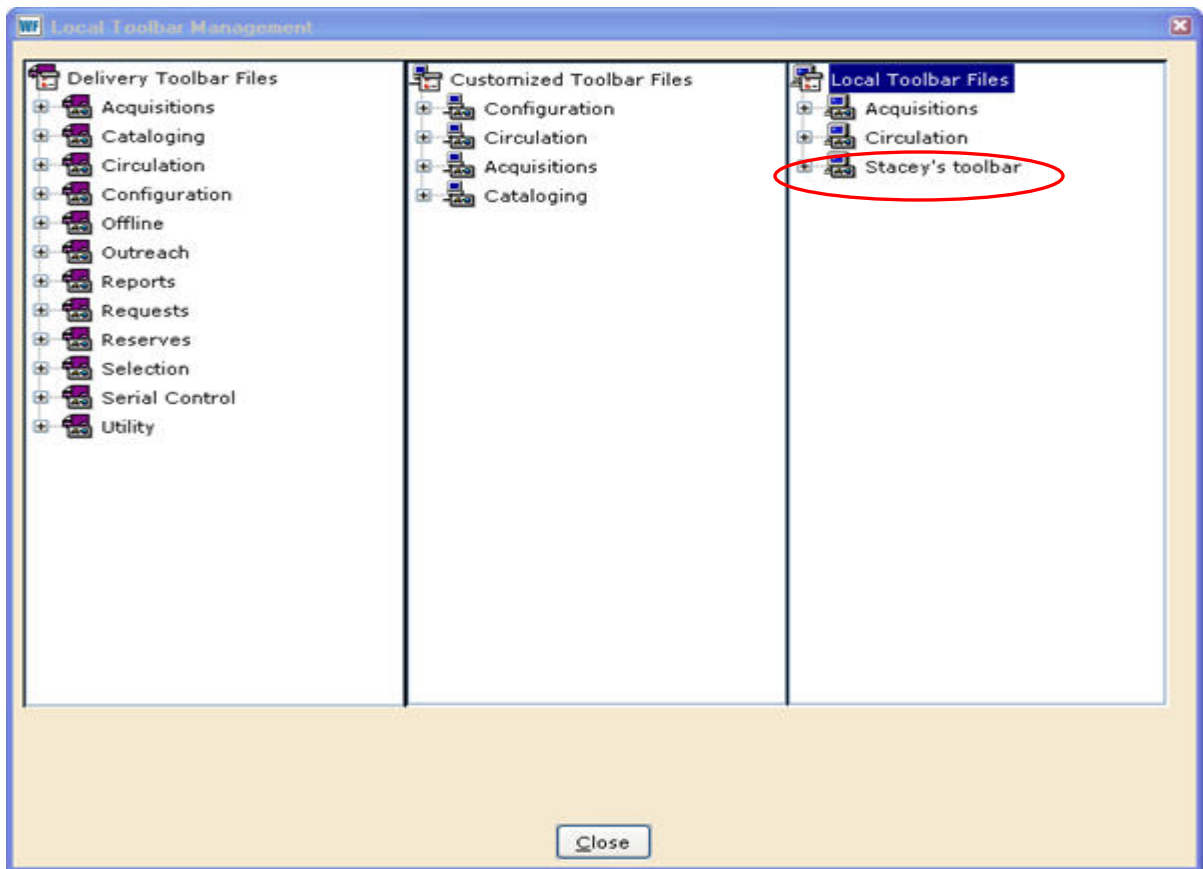
8. To remove a wizard from the Local Toolbar Files, right-click the wizard and click **Remove**.

9. When you finish, click **Close**.

Mapping function keys

You can map wizards function keys for use as keyboard shortcuts. See **Mapping function keys** on page 15.

Removing a toolbar file

To remove a Local Toolbar file:

1. From the menu bar, select **Preference > Desktop > Current Toolbar > Local Toolbar Management**.

2. Right-click the toolbar file and click **Remove**.

You cannot remove a local toolbar file if you are currently using that toolbar. Click a different toolbar file, go back into Local Toolbar Management, right-click the toolbar file you want to remove and click **Remove**.