

Cataloging Manual for
Symphony Workflows

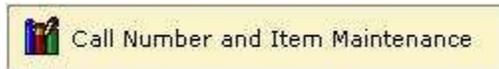
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Introduction

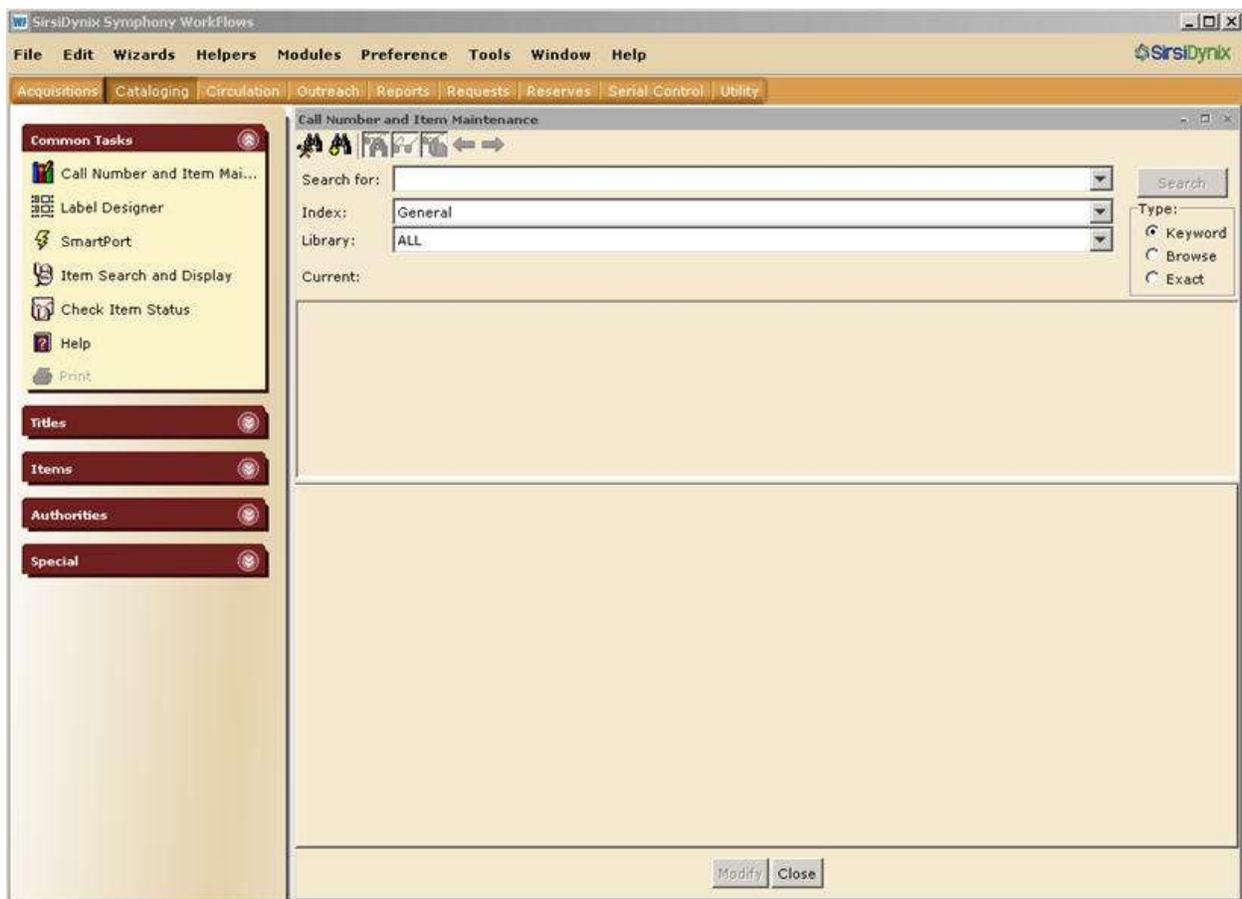
Be sure to check your property settings in cataloging immediately after upgrading your Workflows client to Symphony. You must be logged in as TECH or ACQ (for those libraries using the Acquisitions module) to make and save property changes. To view and change property settings, you must right-click on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

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.

Call Number and Item Maintenance

Search for: knitting and every

Index: Title

Library: ALL

Current:

Search

Type: Keyword Browse Exact

KEYWORD Title knitting and every, ALL: 4 records:

Title	Author	Description	Pub. Year
Lily Chin's knitting tips & tricks : sh...	Chin, Lily M.	208 p. : ill. ; 19 cm.	2009
Every mother is a daughter [sound ...	Klass, Perri, 1958-	9 sound discs (ca. 74 min. each) : d...	2006
Every mother is a daughter : the ne...	Klass, Perri, 1958-	xxvi, 289 p. ; 22 cm.	2006
The ultimate sourcebook of knitting ...		320 p. : ill. (chiefly col.) ; 23 cm.	2003

Description | Call Number/Item

Leader imKa0n

Control number ocm69854376

Control num. ID OCoLC

Date/time stamp 20071029030946.0

Fixed field data sd fungnn|||uu

Fixed field data 060605s2006 orunnn g z eng d

Local system # (Sirsi) a1339484

Cataloging source BLACP BLACP BAKER BTCTA S6L

ISBN 0786170824

ISBN 9780786170821

Music No. Z 3622 Blackstone Audiobooks

Local system # (OCoLC)69854376

Local system # a1339484

LC Call Number HQ755.85 .K565 2006ab

Dewey class number 306.874/3 22

Local holdings S6LA

Personal Author [Klass, Perri, 1958-](#)

Title [Every mother is a daughter \[sound recording\] : \[the neverending quest for success, inner peace, and](#)

Publication info Ashland, Or. : Blackstone Audiobooks. 2006.

Modify Close

- Highlight the record you wish to modify. Click **Modify**. The record will open with the Bibliographic information displaying.

Call Number and Item Maintenance

Every mother is a daughter [sound recording] : [the neverending quest for success, inner peace, and a really clean kitchen (recipes and knitting patterns included)] / Klass, Perri, 1958-

Control Bibliographic | **Call Number/Item** | Bound-with

Shadow title: N

Rec_Type	i	Bib_Lvl	m	TypeCtrl		Enc_Lvl	K
Desc	a	Entrd	060605	Dat_Tp	s	Date1	2006
Date2		Ctry	oru	Comp	nn	Format	n
Parts		Audience	g	Repr		Accomp	
Ltxt	z	Arrang		Lang	eng	Mod_Rec	
Source	d						

Label	Tag	Ind.	Contents
Control number	001		ocm69854376
Control num. ID	003		OCoLC
Date/time stamp	005		20071029030946.0
Fixed field data	007		sd*funngn uu
Local system #	035		(Sirsi) a1339484
Cataloging source	040		BLACP cBLACP dBAKER dBTCTA dS6L
ISBN	020		0786170824
ISBN	020		9780786170821
Music No.	028	02	Z 3622 bBlackstone Audiobooks
Local system #	035		(OCoLC)69854376
Local system #	035		a1339484
LC Call Number	050	14	HQ755.85 b.K565 2006ab
Dewey class number	082	04	306.874/3 222
Local holdings	049		S6LA

Return to Search Save Add Call Number Add Item Delete(x) Close

4. Click on the **Call Number/Item** tab. A new Call Number/Item information screen will open with your defaults.

Control | Bibliographic | Call Number/Item | Bound-with

Every mother is a daughter : the n
 306.874 KLA - ABORO-MAIN
 31654002874987 - 1 - BOOK
 306.8743 K666 - ABORO-MAI
 - 1 - BOOK - STACKS
 306.8743 KLA - CARVER
 32033001021404 - 1 - BOOI
 306.8743 KLAS - NORFOLK-P
 31462002085558 - 2 - BOOI
 306.874 KLA - PEMBROKE
 33335001293019 - 1 - BOOF
 306.8743 K666 - TAUNTON
 32872002826430 - 1 - BOOF

Date created: 6/2/2017
 Date last charged: Never
 Date due: none
 Last discharged: Never
 Date inventoried: Never
 Times inventoried: 0
 Previous user ID:
 Last activity: Never
 In-house uses: 0

Item Info | Holds

Call number: 306.8743 K666 Class scheme: DEWEY
 Call library: ABORO-MAIN
 Shadow call number

Item information

Item ID: Copy number: 1
 Type: BOOK Item library: ABORO-MAIN
 Home location: STACKS Current location: STACKS
 Item cat1: FICTION Item cat2: ADULT
 Item cat3: BOOKS Item cat4:
 Item cat5: Number of pieces: 1
 Media desk: Price: \$0.00
 Total charges: 0 Circulate
 Permanent
 Shadow item

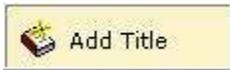
Extended information

Tag	Contents
CIRCNOTE	

Return to Search | Save | Add Call Number | Add Item | Delete(x) | Close

5. To edit any of the Call number or 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.**
6. Click **Save**
7. To add another **Call Number (not copy)** then Click **Add Call Number**.
8. To add another copy. Click **Add Item**.

Add Title Wizard



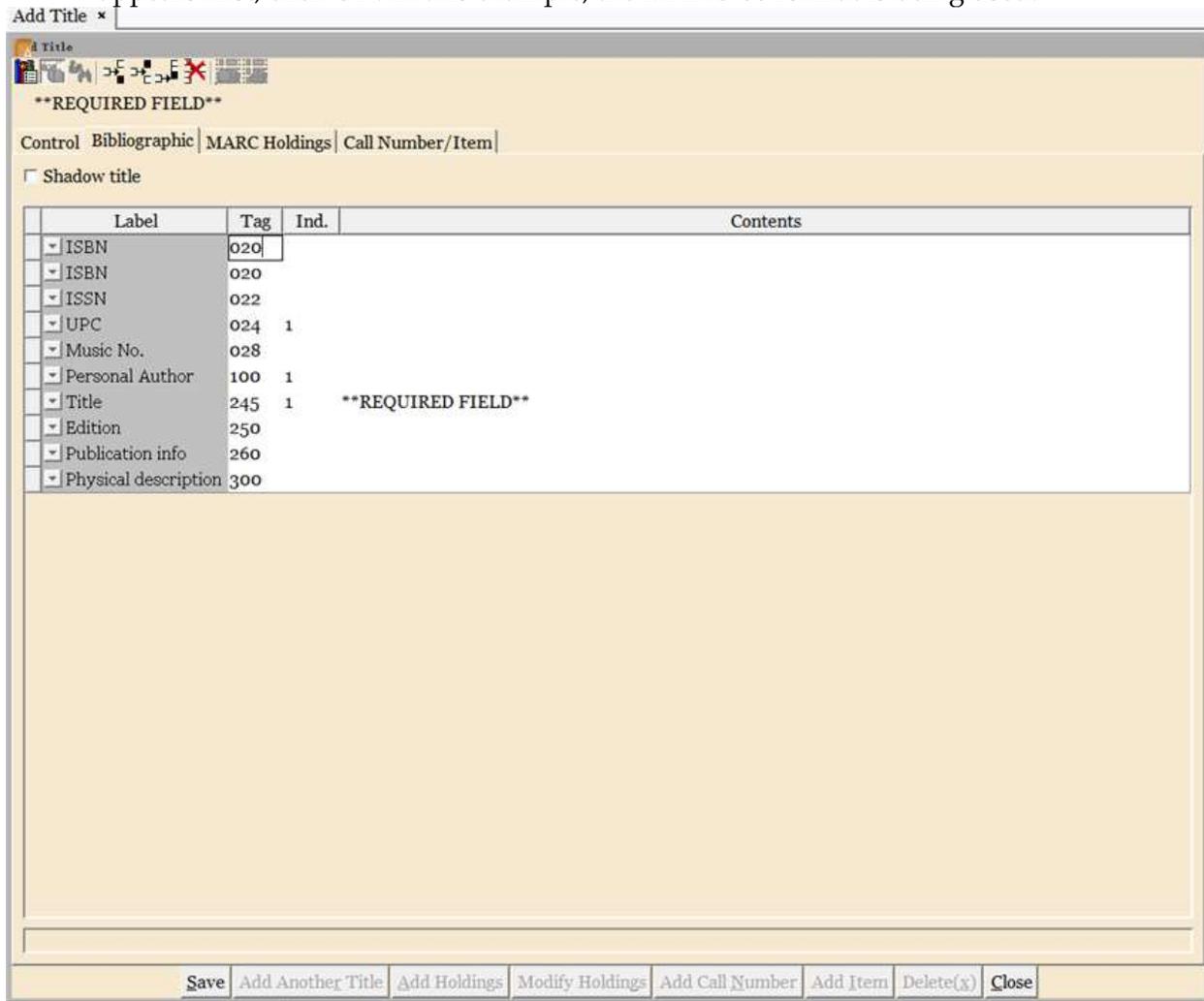
The Add Title wizard is used to create a new bibliographic record and associated call numbers and items. Use this wizard to create your library's request records, magazine records and museum pass records.

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 ISBN 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.

The screenshot shows a software window titled "Add Title" with a menu bar containing "Title", "Control", "Bibliographic", "MARC Holdings", and "Call Number/Item". Below the menu bar is a "Shadow title" checkbox. The main area contains a table with columns "Label", "Tag", "Ind.", and "Contents". The table lists various fields like ISBN, ISSN, UPC, Music No., Personal Author, Title, Edition, Publication info, and Physical description. A red arrow points to the "Contents" column of the second ISBN row.

Label	Tag	Ind.	Contents
ISBN	020		
ISBN	020		
ISSN	022		
UPC	024	1	
Music No.	028		
Personal Author	100	1	
Title	245	1	**REQUIRED FIELD**
Edition	250		
Publication info	260		
Physical description	300		

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

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

****REQUIRED FIELD****

Control Bibliographic MARC Holdings Call Number/Item

Shadow title

Label	Tag	Ind.	Contents
[-] ISBN	020		978123789123
[-] ISBN	020		
[-] ISSN	022		
[-] UPC	024	1	
[-] Music No.	028		
[-] Personal Author	100	1	Slater, Buddy
[-] Title	245	1	Buddy's guide to poker
[-] Edition	250		9th ed.
[-] Publication info	260		Cat Paw Productions 2017
[-] Physical description	300		459 p. col. ill. 27 cm.

Save Add Another Title Add Holdings Modify Holdings Add Call Number Add Item Delete(x) Close

- 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 Call Number/Item Information screen will open.

****REQUIRED FIELD****

Control | Bibliographic | MARC Holdings | Call Number/Item

****REQUIRED FIELD****

XX(2441993.1) - ABORO-
2441993-1001-1 - BO

Call number information

Call number: Class scheme: DEWEY

Call library: ABORO-MAIN

Shadow call number

Item information

Item ID: Copy number: 1

Type: BOOK Item library: ABORO-MAIN

Home location: STACKS Current location: STACKS

Item cat1: FICTION Item cat2: ADULT

Item cat3: BOOKS Item cat4:

Item cat5: Number of pieces: 1

Media desk: Price: \$0.00

Total charges: 0 Circulate

Permanent

Shadow item

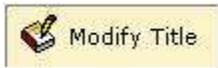
Extended information

Tag	Contents
CIRCNOTE	

Save Add Another Title Add Holdings Modify Holdings Add Call Number Add Item Delete(x) Close

5. Edit any of the Call Number or 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. Click **Save**.
7. Once the record has been saved, the following options will be listed:
 - Add Another Title
 - Add Call Number
 - Add Item - (Add copy)
 - 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.

The screenshot shows the 'Modify Title' wizard interface. At the top, there are search filters: 'Search for:' set to 'DK readers', 'Index:' set to 'Title', and 'Library:' set to 'ALL'. A 'Search' button is on the right. Below the filters, the current record is identified as 'Slater, Buddy --- Buddy's guide to poker --- KX(2001472.1) --- ID:2001472-1001 --- Ctrl#:a2001472 --- Copy:1'. A table of search results is displayed, with the first record highlighted. Below the table, a detailed view of the selected record is shown, including fields like Leader, Control number, ISBN, and Publication info.

Title	Author	Description	Pub. Year
DK Readers L2: Star Wars: Journey Thr...	Windham, Ryder	p. cm.	2015
DK Readers L2: Lego DC Comics Super ...	Not Available	p. cm.	2015
DK Readers L1: Star Wars: What Is a W...	Buller, Laura	p. cm.	2015
DK Readers L2: Star Wars Rebels: Bewa...	Not Available	p. cm.	2014

Description | Call Number/Item

Leader am5a0n
Control number in501623153
Fixed field data 14090482015 |||| ||| |||||
ISBN 9781465433909 \$3.99
ISBN 1465433902 \$3.99
UPC 790778033903
Personal Author [Windham, Ryder](#)
Title [DK Readers L2: Star Wars: Journey Through Space](#)
Edition ed.
Publication info DK Publishing (Dorling Kindersley) 20150119
Physical description p. cm.
Acqupdate A
Held by ABORO-MAIN
Bulletin heading NBK, NEW

[Modify](#) [Close](#)

2. Highlight the record that you need and click **Modify**.

Modify Title x

DK Readers L1 Lego(r) Star Wars Secrets of the Dark Side / Jones, Matt

Control Bibliographic | Call Number/Item | Bound-with

Shadow title

Label	Tag	Ind.	Contents
Control number	001		in502182195
ISBN	020		9781465463364 c\$3.99
ISBN	020		1465463364 c\$3.99
Personal Author	100	1	Jones, Matt
Title	245	10	DK Readers L1 Lego(r) Star Wars Secrets of the Dark Side
Edition	250		ed.
Publication info	260		bDK Publishing (Dorling Kindersley) c20171003
Physical description	300		p. cm.
Holdings	949		fABOROMAIN1 hACQAT oAuJo51517JEYR p3.99 q1 i9781465463364
Acqupdate	950		A
Holdings	999		hACQAT
Held by	596		ABORO-MAIN
Bulletin heading	598		NK-ABORO, NEWKIDS

Return to Search Save Close

- 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.

Modify Title x

DK Readers L1 Lego(r) Star Wars Secrets of the Dark Side / Jones, Matt

Control Bibliographic Call Number/Item Bound-with

Shadow title

Label	Tag	Ind.	Contents
Control number	001		in502182195
ISBN	020		9781465463364 c\$3.99
ISBN	020		1465463364 c\$3.99
Personal Author	100	1	Jones, Matt
Title	245	10	DK Readers L1 Lego(r) Star Wars Secrets of the Dark Side
Edition	250		1 st ed.
Publication info	260		bDK Publishing (Dorling Kindersley) c20171003
Physical description	300		300 p. col. ill. 28 cm
Holdings	949		fABOROMAIN1 hACQAT oAuJo51517JEYR p3.99 q1 i9781465463364
Acqupdate	950		ACQ
Holdings	999		hACQAT
Held by	596		ABORO-MAIN
Bulletin heading	598		NK-ABORO, NEWKIDS

A_Production_XREF - sirsi@206.187.16.147 - FileZilla [Return to Search](#) [Save](#) [Close](#)

- When you have completed editing the record, click **Save**.
- 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



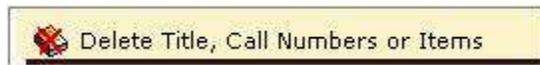
In addition to adding fields, you can also append a field to a record. When you append a field to a record, Unicorn adds the new field at the end of the record.

- 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**.

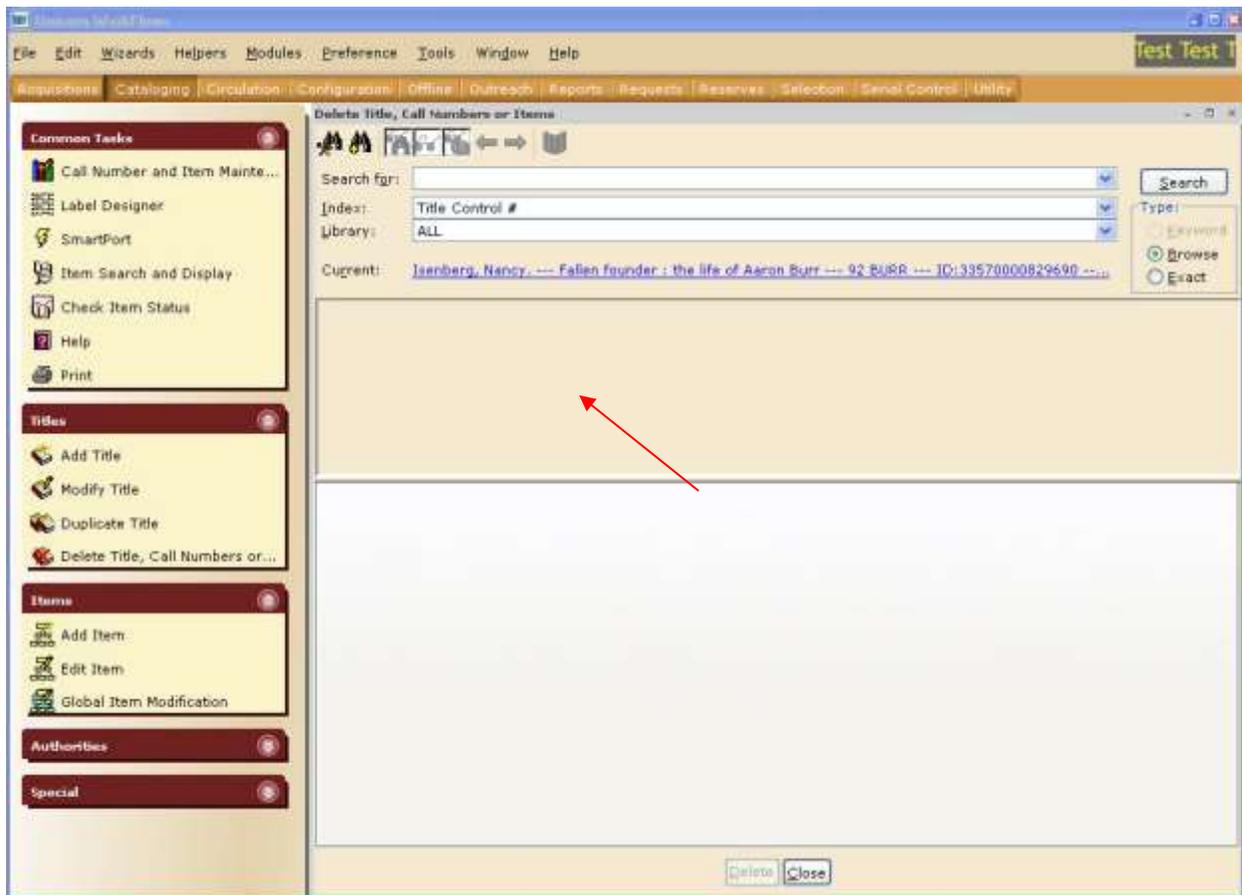
- You must also type the tag number of the field that you have added.
- Unicorn adds the new field at the end of the record.

Delete Title, Call Numbers, or Items Wizard

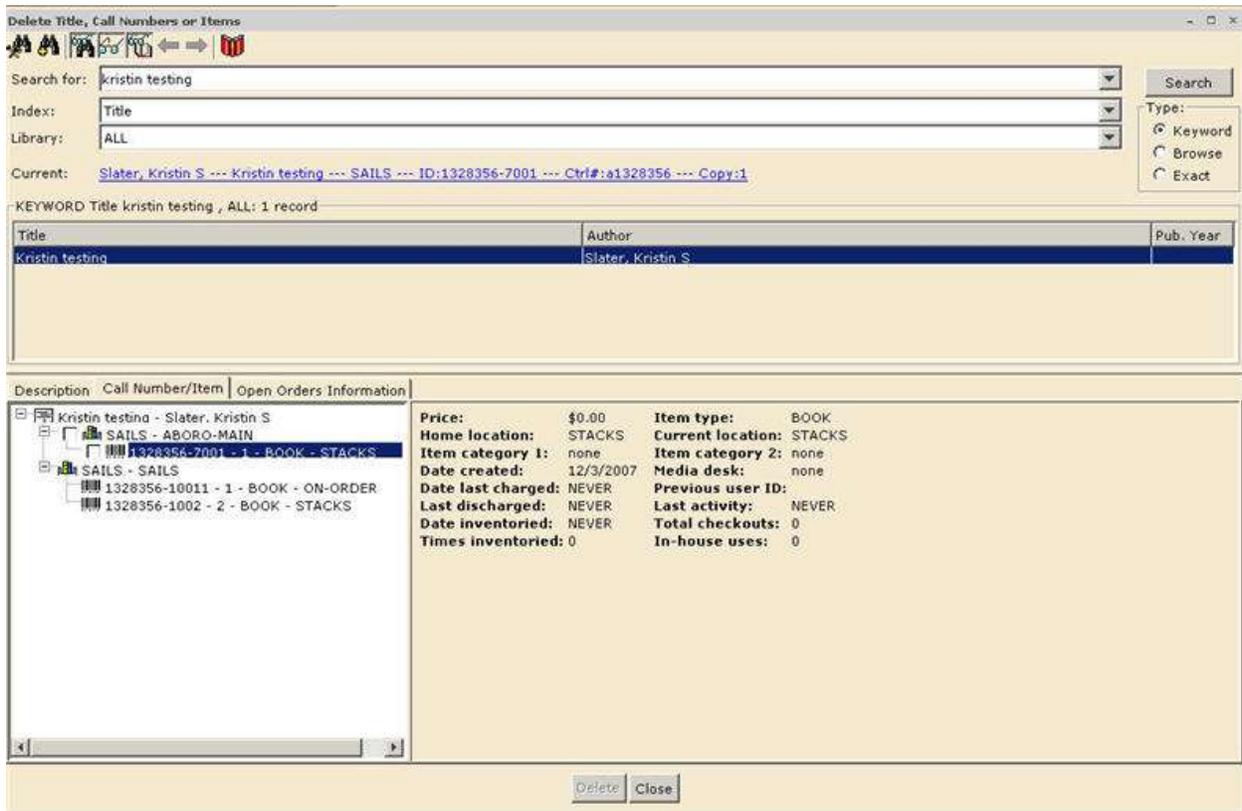


The Delete Title, Call Numbers or Items wizard is used to remove a title, call numbers, or items from the catalog.

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.

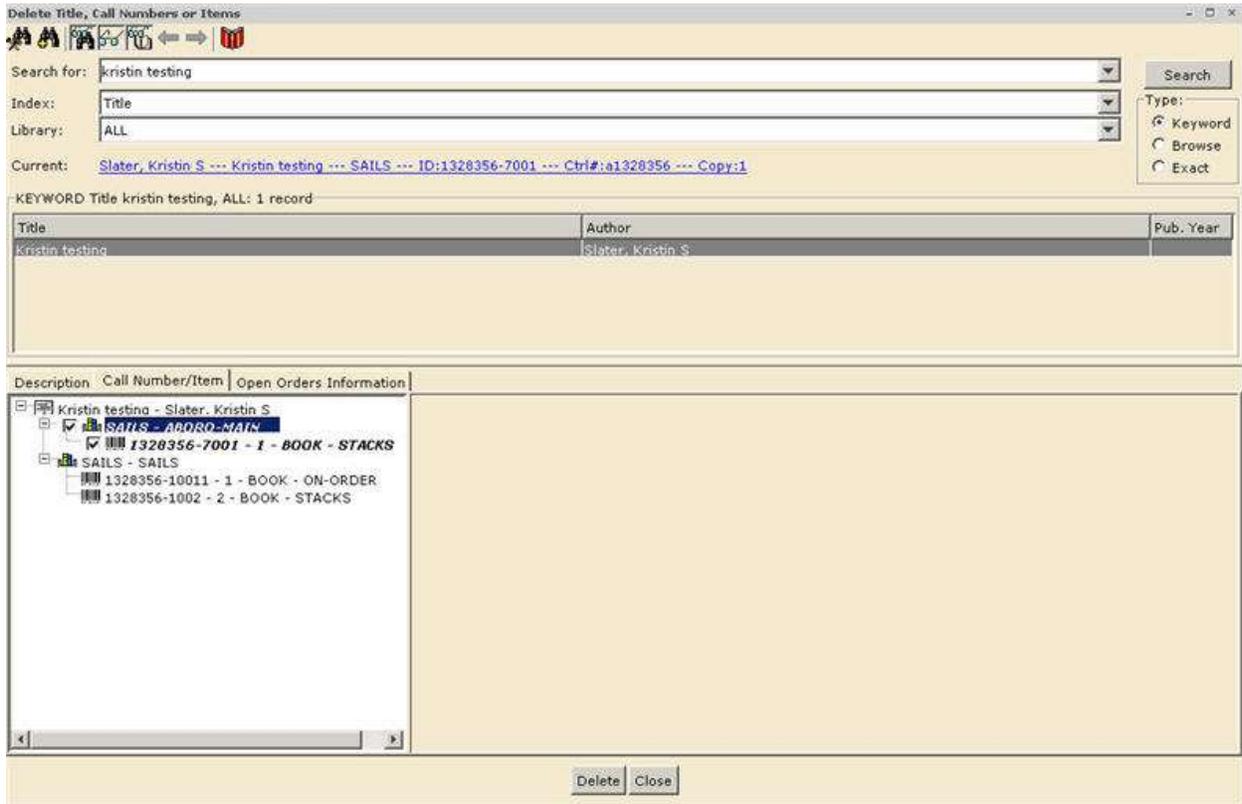


2. If there is more than one record, the list will display in the hit list area. Select the record you want to display and the call numbers/Item tab will open in the record display area.



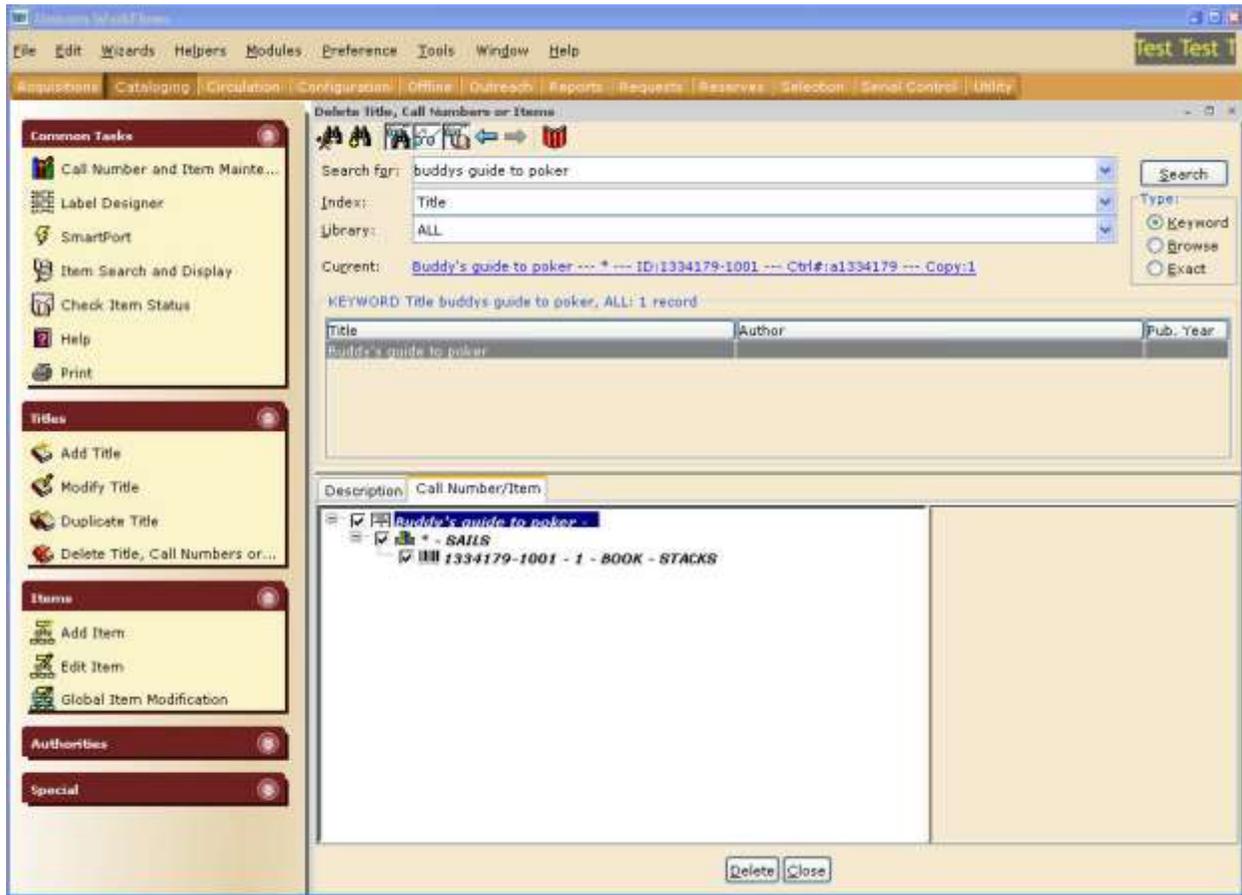
The Call Number/Item tab displays in a tree structure of the title, call numbers and copies. You will only be able to delete your library's call number and copies.

- 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.

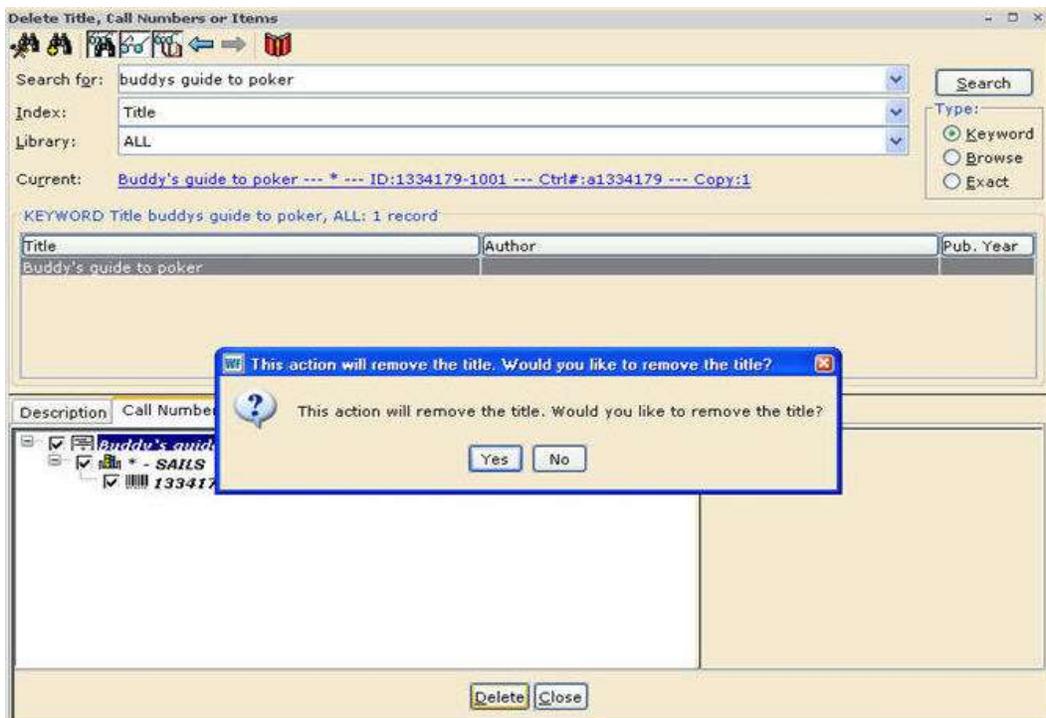


- Click **Delete**.

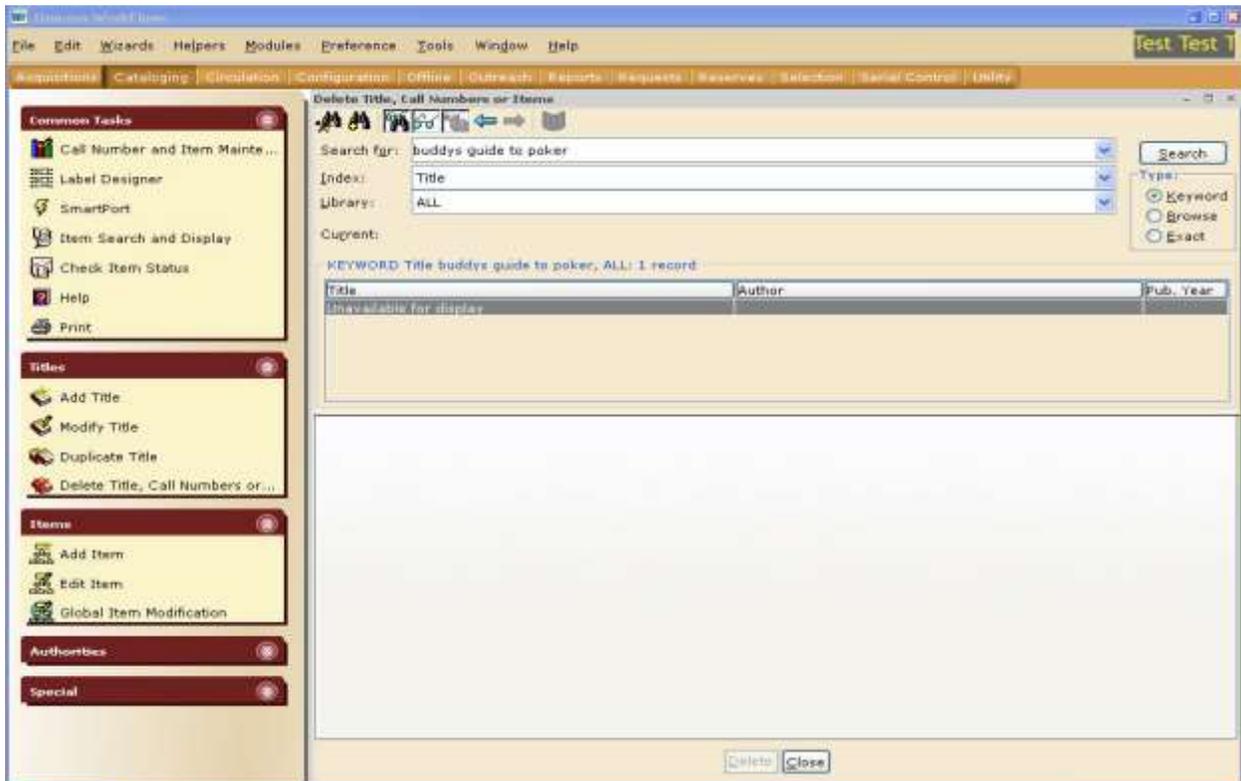
To **Remove a Title and all Copies**, check the box next to the title. The title will display in bold and italics.



1. Click **Delete**. A message window will pop up stating: This action will remove the title. Would you like to remove the title?
2. Click **Yes**.

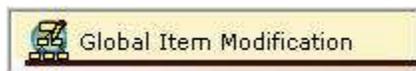


3. After clicking yes, you will return to the search window. In the hit list area, you will see Unavailable for display for the record that was just deleted.

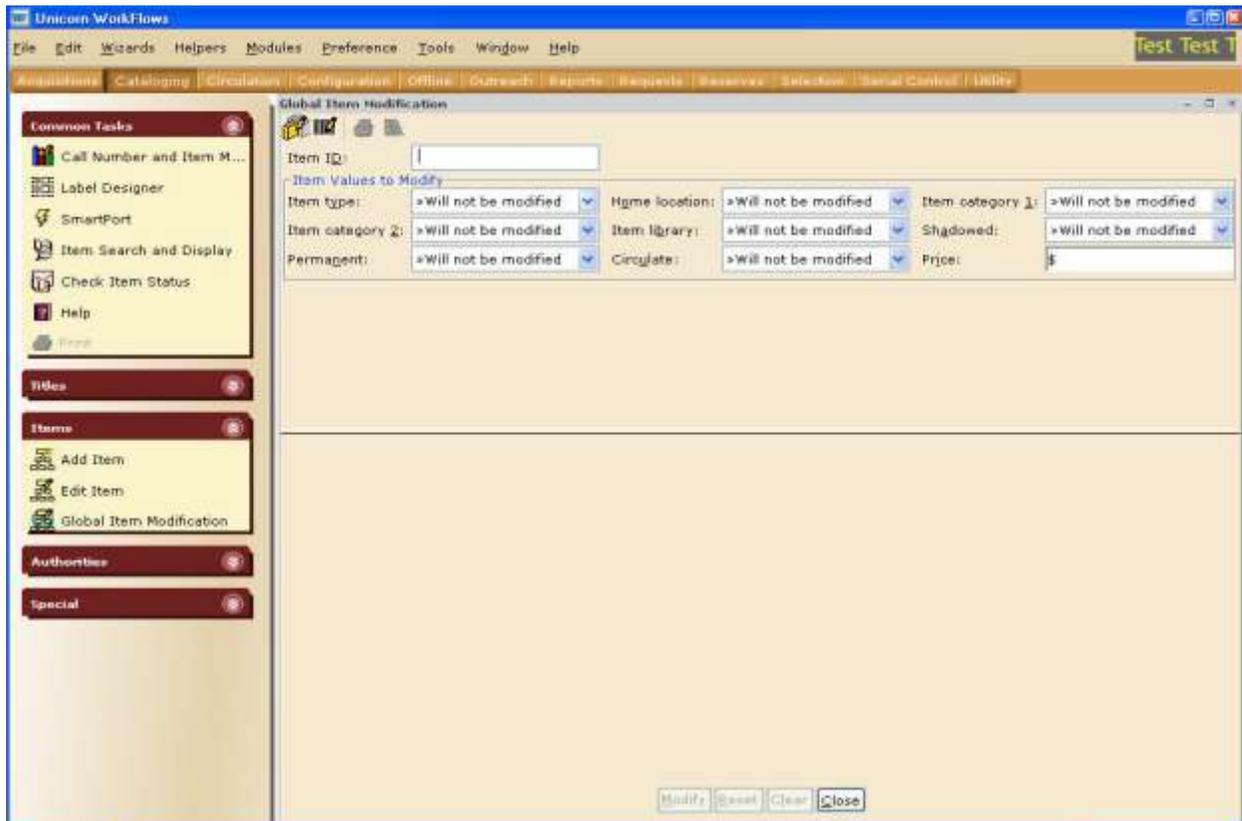


4. Click **Close** or search for another record to delete.

Global Item Modification Wizard

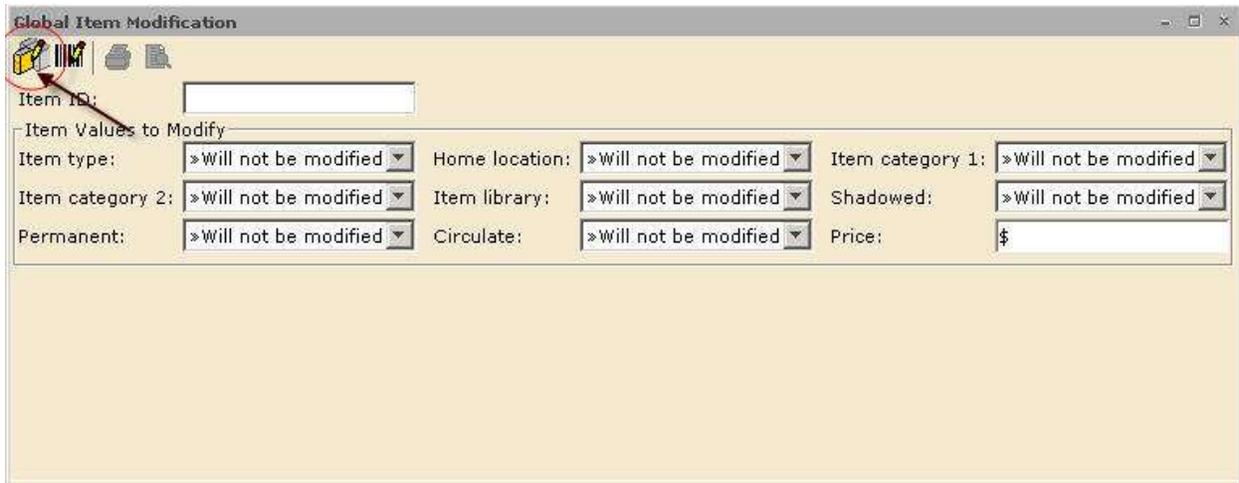


The Global Item Modification wizard allows you to create a template of changes to be made to selected items and globally apply these changes by scanning the IDs of all the selected items.



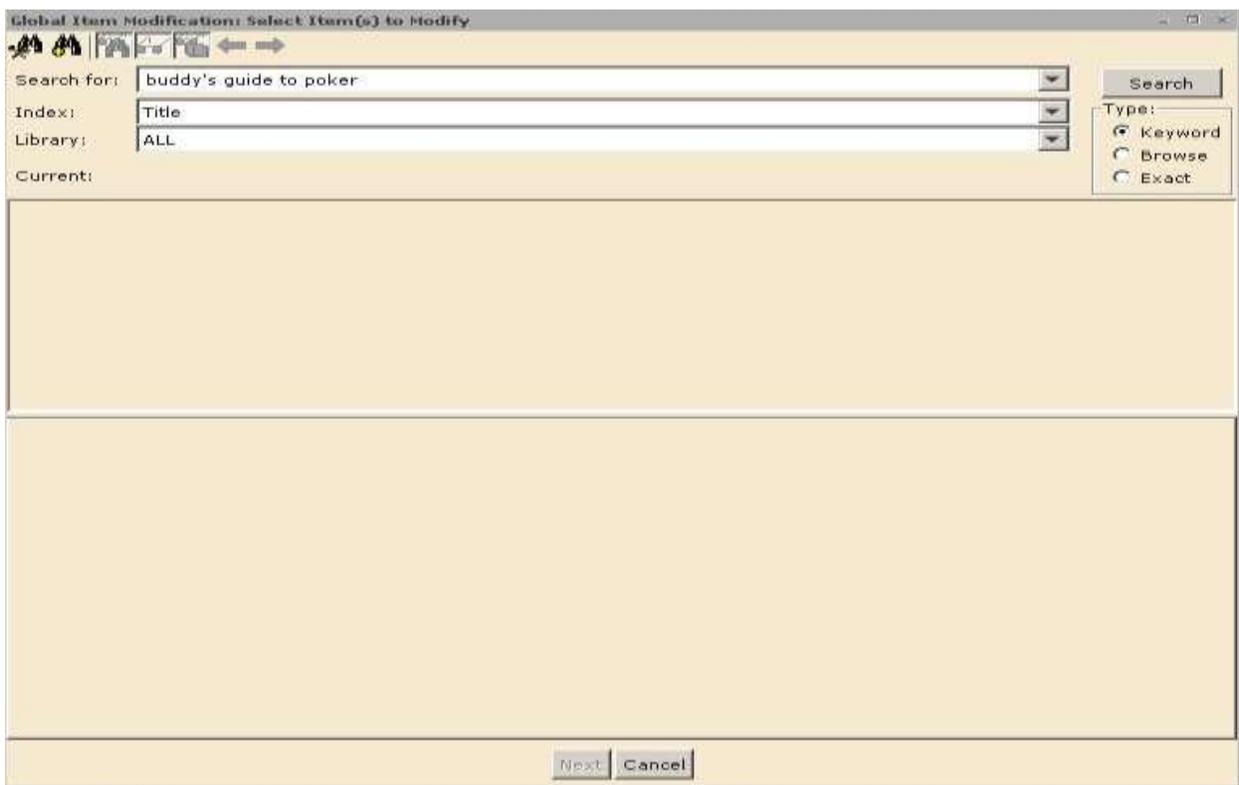
1. Click on the **Global Item Modification wizard**.
2. Under **Item Values to Modify**, make any needed changes to the item value fields by selecting a new policy value from the drop-down list.
3. To reset the item values, click **Reset**. In the **Item ID** box, type or scan each item's ID that you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

If you do not have the Item IDs to scan, you can use the Modify Selected Items tool.



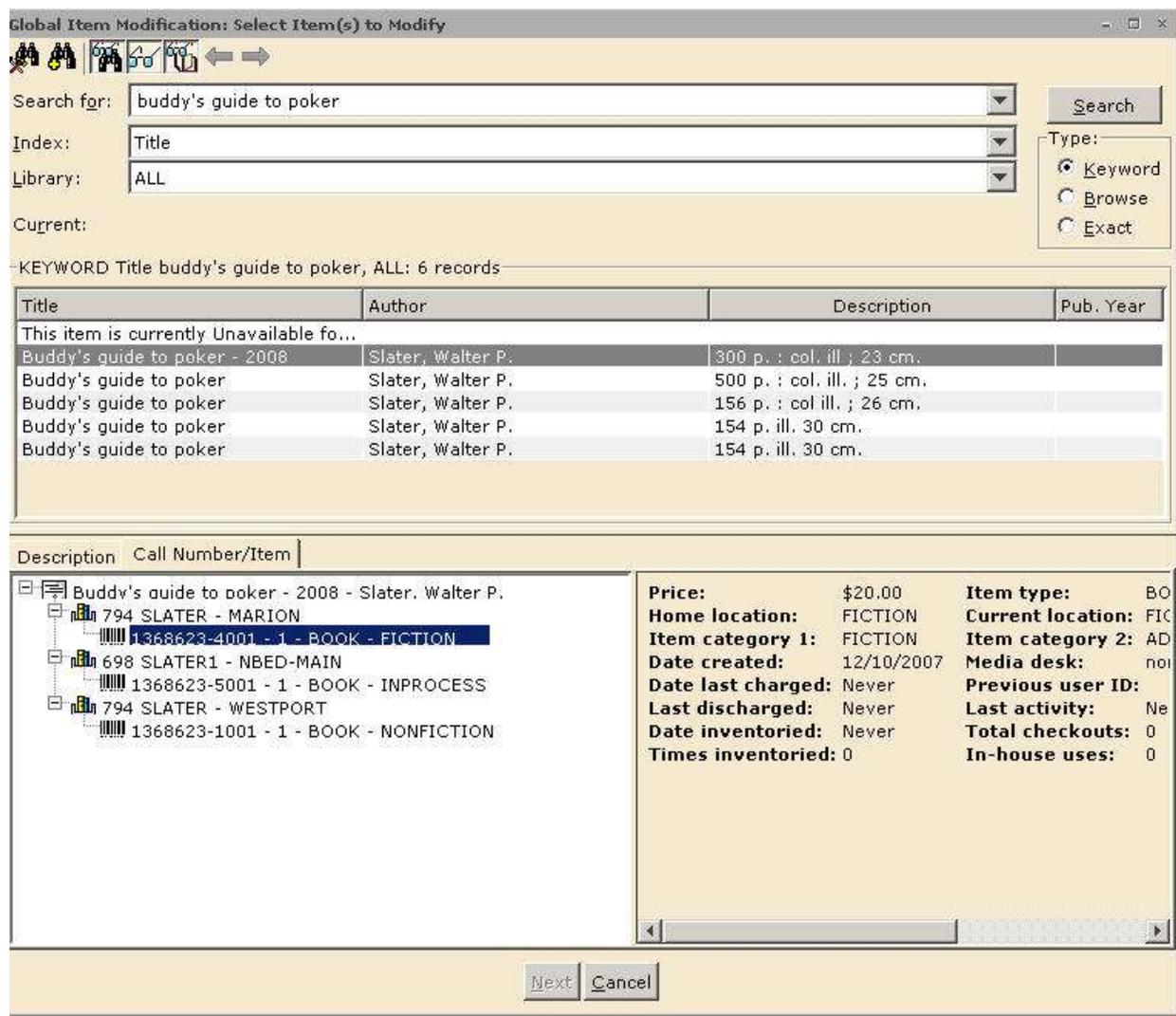
The screenshot shows the 'Global Item Modification' window. At the top left, there is a toolbar with several icons, including a magnifying glass and a document. Below the toolbar is an 'Item ID:' text box. Underneath is a section titled 'Item Values to Modify' containing several dropdown menus and a text box: 'Item type:' (set to '»Will not be modified'), 'Home location:' (set to '»Will not be modified'), 'Item category 1:' (set to '»Will not be modified'), 'Item category 2:' (set to '»Will not be modified'), 'Item library:' (set to '»Will not be modified'), 'Shadowed:' (set to '»Will not be modified'), 'Permanent:' (set to '»Will not be modified'), 'Circulate:' (set to '»Will not be modified'), and 'Price:' (set to '\$').

1. Click on Modify Selected tool. A search screen will open.

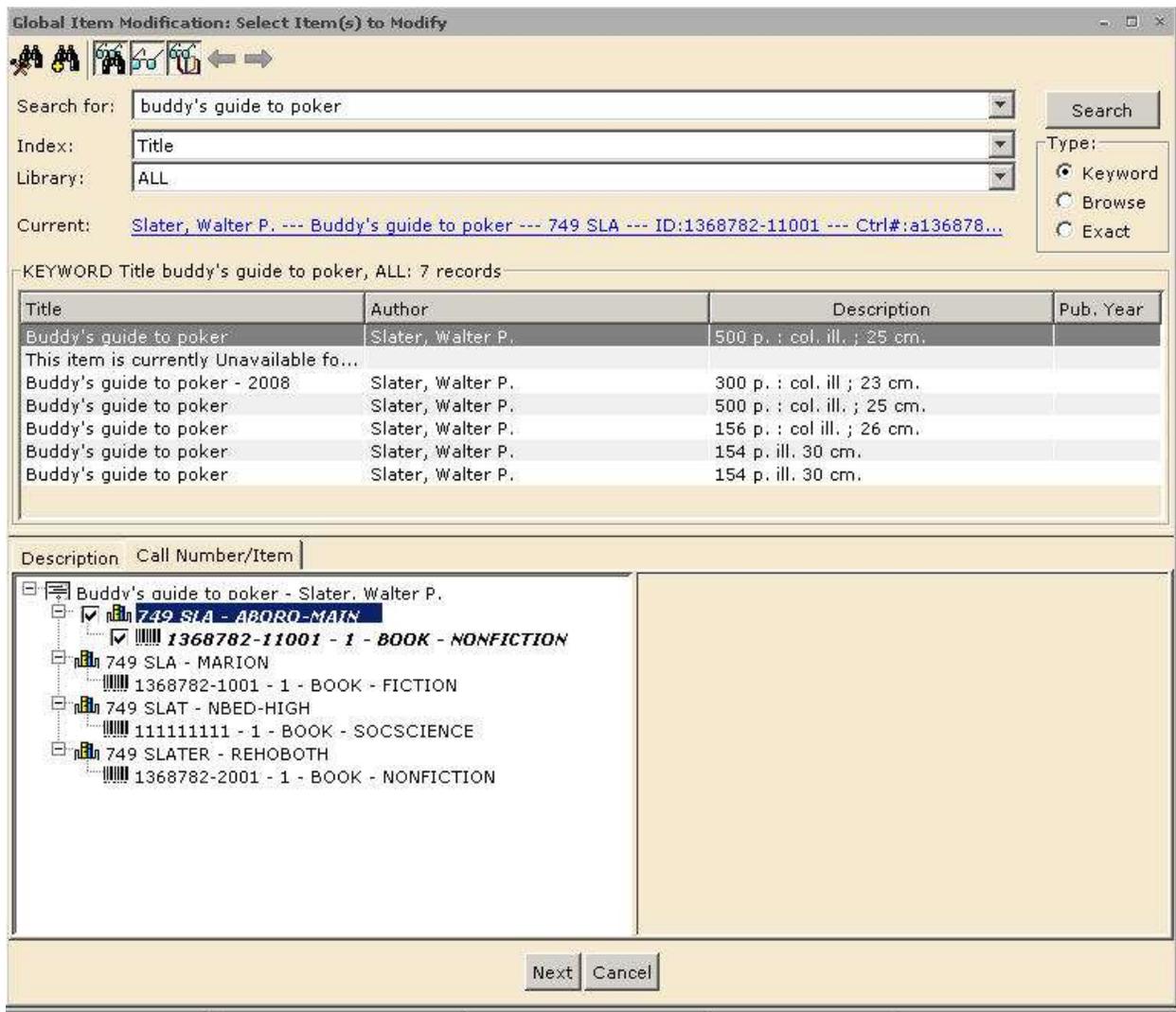


The screenshot shows the 'Global Item Modification: Select Item(s) to Modify' search screen. It features a search bar with the text 'buddy's guide to poker'. Below the search bar are three dropdown menus: 'Index:' (set to 'Title'), 'Library:' (set to 'ALL'), and 'Current:'. To the right of these dropdowns is a 'Search' button. Below the search bar and dropdowns is a large empty area for search results. At the bottom of the window are 'Next' and 'Cancel' buttons.

2. Search for the title or titles you wish to modify.



3. Highlight the title you wish to modify.
4. Click Next.



5. Click the copy or copies that you wish to modify.
6. Click **Next**

You will return to Global Item Modification: Modify Selected Item. If you haven't chosen a value to edit, you can do so now.

Global Item Modification: Modify Selected Items

Item Values to Modify

Item type:	»Will not be modified ▾	Home location:	STACKS ▾	Item category 1:	»Will not be modified ▾
Item category 2:	»Will not be modified ▾	Item library:	»Will not be modified ▾	Shadowed:	»Will not be modified ▾
Permanent:	»Will not be modified ▾	Circulate:	»Will not be modified ▾	Price:	\$

Modify Cancel

7. Click **Modify**.

Global Item Modification

Item ID: 1368782-11001

Item Values to Modify

Item type: »Will not be modified Home location: STACKS Item category 1: »Will not be modified

Item category 2: »Will not be modified Item library: »Will not be modified Shadowed: »Will not be modified

Permanent: »Will not be modified Circulate: »Will not be modified Price: \$

Title	Author	Call number	Copy	Item ID
Buddy's guide to poker	Slater, Walter P.	749 SLA	1	1368782-11001

Item type: BOOK
Home location: NONFICTION Modified to: STACKS
Item category 1: NONFICTION
Item category 2: ADULT
Item library: ABORO-MAIN
Shadowed: N
Permanent: Yes
Circulate: Yes
Price: 0.00

Modify Reset Clear Close

You will see the title and information that was modified.