Call Number and Item Maintenance—Add & Edit Items

The Horizon software utilized a two tiered level for bibliographic data and item data. Symphony WorkFlows catalog records utilize a three tiered level system. In order to successfully add and edit items, you must be familiar with the three tiers. In much of the documentation you will also see the tiers referred to as trees. The first tier is the Title or Catalog Record. It consists of the bibliographic data (author, title, subject headings, format) The second tier is the Call Number or Volume information. In this tier you will find or record call number, class scheme (Dewey) and the owning library. The third tier contains the specific item information such as item ID, item type, home location, current location, price, etc.

Bibliographic Record Structure

SirsuDynix Symphony catalog records include the following types of information:

1. **Title or Catalog**
   - Fixed Fields
   - Bibliographic Data
     - (Title Author, Subject)

2. **Call Number or Volume**
   - Call Number
   - Class Scheme
   - Library

3. **Item**
   - Item ID/Barcode
   - Item Type
   - Location
   - Price

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Title

Call Number

Item

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The hunger games - Collins, Suzanne

PZ 7 .C6837 HUN 2008 - SEO

31705003969471 - 1 - GENCIRC - CHECKEDOUT - Can’t Circ

YA F COL - ACM

39061002492244 - 1 - GENCIRC-FF - DISCARD - Can’t Circ

39061002663075 - 2 - GENCIRC-FF - INTRANSIT

YA F COL - ACN

39061002492186 - 1 - GENCIRC-FF - INTRANSIT
1. **Item Search**

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, is the same as General Keyword searching in Horizon. In fact, it’s better in WorkFlows because 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.
- **ISBN**—Searches for the ISBN within the MARC record.

**Type**

- **Keyword**—Keyword searching locates and displays records that contain the terms you entered.
- **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 specific number or code searches.

**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**

You can do a General Keyword search of *October Sky*. However, if you have a format or phrase that has multiple words, it will not work. Including “**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 work. It will work however if you add the boolean operator “**and**”: *James Patterson and large print*. Another example is Brad Taylor *One Rough Man* (Author and title) will not work, so try Brad Taylor *and One Rough Man* and that will work.

**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.
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**.
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

G. **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.

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

I. **Home Location**- Home location refers to the collection code for your new item. **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 Cat1**- Item Category One populates the icon that is viewed on the OPAC. It is also used for statistics.

L. **Item Cat2**- If your item is categorized as adult, Item Cat2 will give you the option to assign a genre. **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. **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.

N. **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***

O. **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.

P. **Price**- Please enter the value or price of your item.
Q. **Permanent** indicates whether the item is part of your library's permanent collection.

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

<table>
<thead>
<tr>
<th>Tag</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIRCNOTE</td>
<td></td>
</tr>
<tr>
<td>PUBLIC</td>
<td></td>
</tr>
<tr>
<td>STAFF</td>
<td></td>
</tr>
</tbody>
</table>

S. 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.

T. 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.

<table>
<thead>
<tr>
<th><strong>Number of Pieces</strong></th>
<th><strong>CIRCNOTE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Allows you to specify the number of pieces included, numerically only. <strong>Example:</strong> Number of Pieces: 8</td>
<td>Allows you to specify the number of pieces included using a free text field. <strong>Example:</strong> CIRCNOTE: 8 DISCS</td>
</tr>
<tr>
<td>The Number of Pieces message automatically displays during checkout or checkin.</td>
<td>The contents of the CIRCNOTE are currently configured to display during checkin only.</td>
</tr>
<tr>
<td>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.</td>
<td>During checkin, the CIRCNOTE will display after the barcode has been scanned. Staff will be required to click Close to continue the transaction.</td>
</tr>
<tr>
<td>The Number of Pieces message appears BEFORE a transaction has completed. <strong>Example:</strong> <strong>During checkin</strong>, 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. <strong>Example:</strong> <strong>During checkout</strong>, if staff notices that the item is missing pieces, they have the option to not check out the item.</td>
<td>During checkin, the CIRCNOTE will display after the barcode has been scanned. <strong>Example:</strong> <strong>During checkin</strong>, 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.</td>
</tr>
</tbody>
</table>

***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:

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 refers to the collection code for your new item. 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 Cat1 - Item Cat1 populates the icon that is viewed on the OPAC. It is also used for statistics.
H. Item Cat2 - If your item is categorized as adult, Item Cat2 will give you the option to assign a genre. **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. 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.
J. 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. ***Please see note on page 7 concerning Number of Pieces versus CIRCNOTE***
K. **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.

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

M. **Permanent** indicates whether the item is part of your library’s permanent collection.

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

O. 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**

P. Click **Save** to retain your item record.
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. If the search results in a hit list of titles, 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.***

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**.
7. **Deleting Titles, Call Numbers or Items**

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 3170502943774 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.

A call number/item that has holds or is on reserve cannot be removed. Any item that is checked out or has unpaid bills cannot be deleted.

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