



Add an Item in WorkFlows

Updated 12/2017

First make sure your properties are correct!

Close your wizards and right click on the **Call Number and Item Maintenance Wizard** to set your properties - Once they look like the images below, click save and restart workflows

Display property page: Wizard Startup Never

Behavior Defaults Helpers

Search library preferences

Search library list type: Search by library
 Search by search library group
 Search by library or search library group

Search library list: ALL

Select Behavior

- Add call number
 - Prompt for library when adding a new call number
 - Auto-generate temporary XX call numbers
 - Add item when adding a new call number
- Add item
 - Auto-generate item ID when adding item
 - Modify existing call number
 - Modify existing item
 - Delete call number
 - Delete item
 - Prompt before deleting items with bills
 - Maintain MARC Holdings
 - Set current location of new items to AVAILABLE_SOON
 - Print labels for new items
 - Automatically
 - Prompt for label template
 - Print preview
 - Use label template profiles

Search preferences

Type: BROWSE
Index: Title
Library: ALL

Display View Pane

Editor display options

MARC View Display fixed fields
 Descriptive view Display descriptive labels (

Call number default values

Library: MTSC Shadow call number
Class scheme: DEWEY Show shelving key

Item tree defaults

Item tree display collapsed Item tree display expanded

Extended Info Display Options

Display staff note on item list
 Display public note on item list

Item required default values

Type: BOOK Permanent
Home location: STACKS Circulate

These may vary depending on what you are cataloging.

- Common Tasks**
 - Call Number and It...
 - Label Designer
 - SmartPort
 - Item Search
 - Check Item Status
 - Help
 - Print

- Title Maintenance**
- Item Maintenance**
- Authority Maintenance**
- Special**

1. Go to **Cataloging>Common Tasks>Call Number and Item Maintenance**

2. Search all libraries for the item using browse and title. If you don't find it the first time try again with a different method (example: ISBN/Exact Search or Title/Keyword Search – Always try at least twice. One should be a keyword.)

Call Number and Item Maintenance

Search for: watership down

Index: Title

In this library: ALL

Current: [Adams, Richard, 1920- --- Watership Down --- YA ADAMS --- ID:39525010054790 --- Ctrl#:o00730688 --- Copy:1](#)

BROWSE Title watership down, ALL

Title	Heading Occurrences
Watersheds--Montana file.	1
Watership Down	14
Watership down (Motion picture)	1
Watership Down (Television program)	1
Waterside living : inspirational homes by lakes, rivers, and the ocean /	1
Waterside modern /	1

- Records Description Call Number/Item
- Watership Down - Adams, Richard, 1920-
 - YA ADAMS - BITTERROOT
 - 39525010054790 - 1 - BOOK - CHECKEDOUT
 - FIC ADA - BOULDER
 - 39515000540320 - 1 - BOOK - FICTION
 - F ADAMS - DILLON
 - 39512010227824 - 1 - BOOK - FICTION
 - PR 6051 .D345 W3 1996 - FVCC
 - 33656000588327 - 1 - BOOK - STACKS
 - F ADAMS - HFL
 - 37455000106891 - 1 - BOOK - FICTION
 - ADAMS - MSLA-MAIN
 - 33144009137230 - 1 - BOOK - CHECKEDOUT
 - F ADA - PLAINS
 - 39522000008209 - 1 - BOOK - FICTION
 - F ADAMS - POLSON
 - 39523000507729 - 1 - BOOK - MISSINGSHC
 - HS FIC ADA - MISSION
 - 39524000039812 - 1 - BOOK - HIGH-FIC
 - HS FIC ADA - MISSION
 - 39524010097073 - 1 - BOOK - HIGH-FIC

Price: \$15.00

Home location: YA-FICT

Item category 1: none

Item category 3: FICTION

Item category 5: none

Date created: 6/30/2003

Date last charged: 8/12/2016

Last discharged: 4/29/2016,23:59

Date inventoried: 4/22/2013

Times inventoried: 3

Item type: BOOK

Current location: CHECKEDOUT

Item category 2: YA

Item category 4: none

Previous user ID: none

Card #: 29525000237944

Last activity: 8/12/2016

Total checkouts: 51

In-house uses: 0

Ongoing checkouts: 17

Ongoing renewals: 12

Checkouts to date: 17

Renewals to date: 12

Date last cleared: Never

3. Use sections 2 and 3.1 of the SCP to determine which record and attachment rules are the most appropriate to use - then highlight that item record.

4. Click **Modify**

5. Make sure the item is selected. If you see a call number you would like to use you may highlight it instead of the item to add it to your call number field.

6. Click **Add Call Number**

7. If you have more than one site select your library from the drop down menu in the popup. If you are a single site, you can turn this popup off in properties.

Add Volume: Library for new call number

Library for new call number: MSLA-MAIN

OK

Cancel

Number and Item Maintenance

Records Description Call Number/Item

Watership Down - Adams, Richard, 1920-
YA ADAMS - BITTERROOT

Information

Call number: YA ADAMS Class scheme: DEWEY

Call library: BITTERROOT

Shadow call number

Item information

Item ID: 39525010054790 Copy number: 1

Type: BOOK Item library: BITTERROOT

Home location: YA-FICT Current location: CHECKEDOUT

Item cat1: Item cat2: YA

Item cat3: FICTION Item cat4:

Item cat5: Number of pieces: 1

Media desk: Price: \$15.00

Total charges: 51 Circulate

Permanent

Shadow item

Extended information

Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

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

- Watership Down - Adams, Richard,
 - YA ADAMS - MTSC
 - 8867-136001 - 1 - BOOK - S
 - YA ADAMS - BITTERROOT
 - 39525010054790 - 1 - BOOK
 - FIC ADA - BOULDER
 - 39515000540320 - 1 - BOOK
 - F ADAMS - DILLON
 - 39512010227824 - 1 - BOOK
 - PR 6051 .D345 W3 1996 - FVCC
 - 33656000588327 - 1 - BOOK
 - F ADAMS - HFL
 - 37455000106891 - 1 - BOOK
 - ADAMS - MSLA-MAIN
 - 33144009137230 - 1 - BOOK
 - F ADA - PLAINS
 - 39522000008209 - 1 - BOOK
 - F ADAMS - POLSON
 - 39523000507729 - 1 - BOOK

Date created: 9/7/2016
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

Call number information

Call number: YA ADAMS Class scheme: LC
Call library: MTSC
 Shadow call number

Item information

Item ID: 8867-136001 Copy number: 1
Type: BOOK Item library: MTSC
Home location: STACKS Current location: STACKS
Item cat1: Item cat2:
Item cat3: 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	
PUBLIC	
STAFF	

8. Scan or type the item barcode into the item ID section

9. If you scan the barcode it will automatically save, but if you type the barcode you will need to click Save.

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