

# Adding items in Workflows to the UPRLC shared catalog

**Objective:** to learn how to add library items to existing bibliographic records in the shared UPRLC catalog (**Questions? please contact:** [support@superiorlandlibrary.org](mailto:support@superiorlandlibrary.org))

## **Part 1: Understanding the big picture**

(If you've worked in libraries for years, you can probably skim this first part or go right to [the step by step](#); if you're new to library work, you will want to read carefully.)

### **Background on library catalogs and catalog records in general:**

Depending on your age, you may or may not have firsthand experience of card catalogs. Some people still refer to modern online library catalogs as card catalogs because they serve the same purpose. The catalog information for library items used to be stored on little index cards that were stored in custom drawers, often made of wood with pretty, brass fittings, hence the nostalgia. (Imagine the labor involved typing out the cards and the learning curve in helping patrons find materials.)

Now the information about each title is stored in computer records that are easily shared amongst institutions because the records conform to an international standard called MaRC (Machine Readable Cataloging). The computer platforms for storing and accessing the library catalogs also contain patron records. Library staff commonly refer to these platforms as ILS's or ALS's (Integrated Library Systems or Automated Library Systems). Our system is created by SirsiDynix, an international company. The product is called Symphony. The two major components are Workflows (staff interface) and Enterprise (the public interface – also referred to as a PAC or OPAC (Public Access Catalog or Online Public Access Catalog)).

- Catalog records have two roles:
  1. **Checkout** – When an item is checked out to a patron the catalog record contains all the information regarding the title, author, type of material, length of checkout and cost if the item is lost or damaged
  2. **Discovery** – The record also contains all the information that allows a patron or library staff to find a book (or DVD or other items) by title, subject, author, reading level, character, series, to sort by publication date, format, fiction and nonfiction and then guide the user to where to find it in the library and where to locate it on the shelf and whether or not it's available. Good records often link to images of the item and include a description. A good record will allow your patrons to be able to search your catalog via the public interface from wherever they are and know whether or not you have what they seek.

**Background on UPRLC:** UPRLC stands for Upper Peninsula Region of Library Cooperation. UPRLC has the same staff as the Superiorland Library Cooperation but is funded differently. Everything to do with the shared catalog and Workflows (our Automated or Integrated Library System (ALS or ILS)) is managed by UPRLC. School libraries belong to UPRLC, but not to SLC. We post lots of support materials for how to use and manage our ILS on the UPRLC website:

<https://uprlc.org/technical-services-training/uprlc-cataloging-tools/>

**Background on our shared catalog:** Your library’s catalog of your library’s collection of materials is part of the UPRLC larger catalog shared by over 80 libraries in the Upper Peninsula and northern lower Michigan. Some of these libraries also share materials through a regional interlibrary loan program. Some of these libraries participate in melcat, the statewide interlibrary loan program.

Sharing the bibliographic records, the records that describe each manifestation (or format) of each title, has several advantages:

- Simplifies cataloging process
- Simplifies interlibrary loan
- Allows for reduced costs
- Allows for a nimbler system

**Three record levels** for every cataloged item in shared collection. (It helps to understand the big picture, but you will only be editing the second and third levels – call number and item numbers records)

- I. **MaRC/Bibliographic/Title records:** catalog records that describe a single **manifestation** of a work. These records are shared throughout our system. These records are generally built by trained catalogers outside our system and imported by individuals trained in selecting good records. Or in the case of locally created or other unique items, they are built by individuals trained in creating records using the proper computer code.

Call Number and Item Maintenance x

Number and Item Maintenance

Little house in the big woods / Wilder, Laura Ingalls, 1867-1957.

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

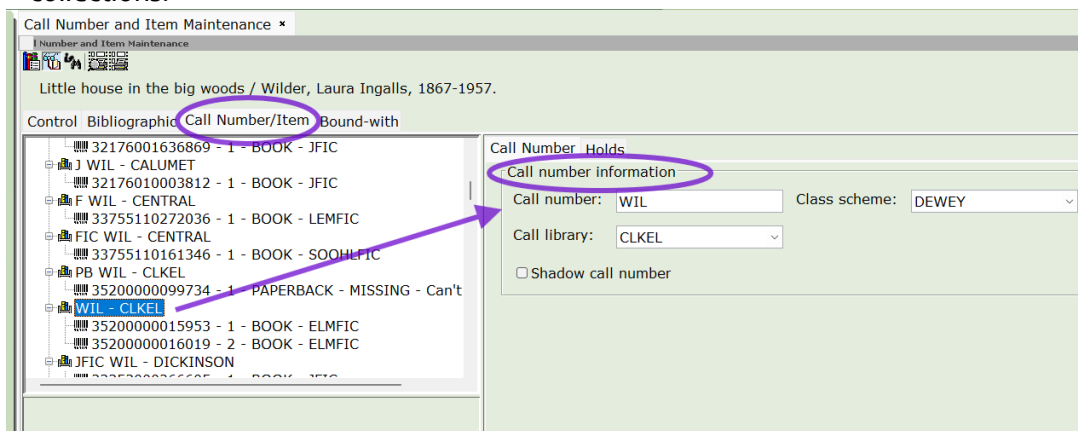
Shadow title: N

Rec_Status	c	Rec_Type	a	Bib_Lvl	m	TypeCtrl
Enc_Lvl		Desc	a	Entrd	850904	Dat_Tp
Date1	1953	Date2		Ctry	nyu	Illus
Audience	j	Repr		Cont		GovtPub
ConfPub	0	Festschr	0	Indx	0	Fiction
Biog		Lang	eng	Mod_Rec		Source

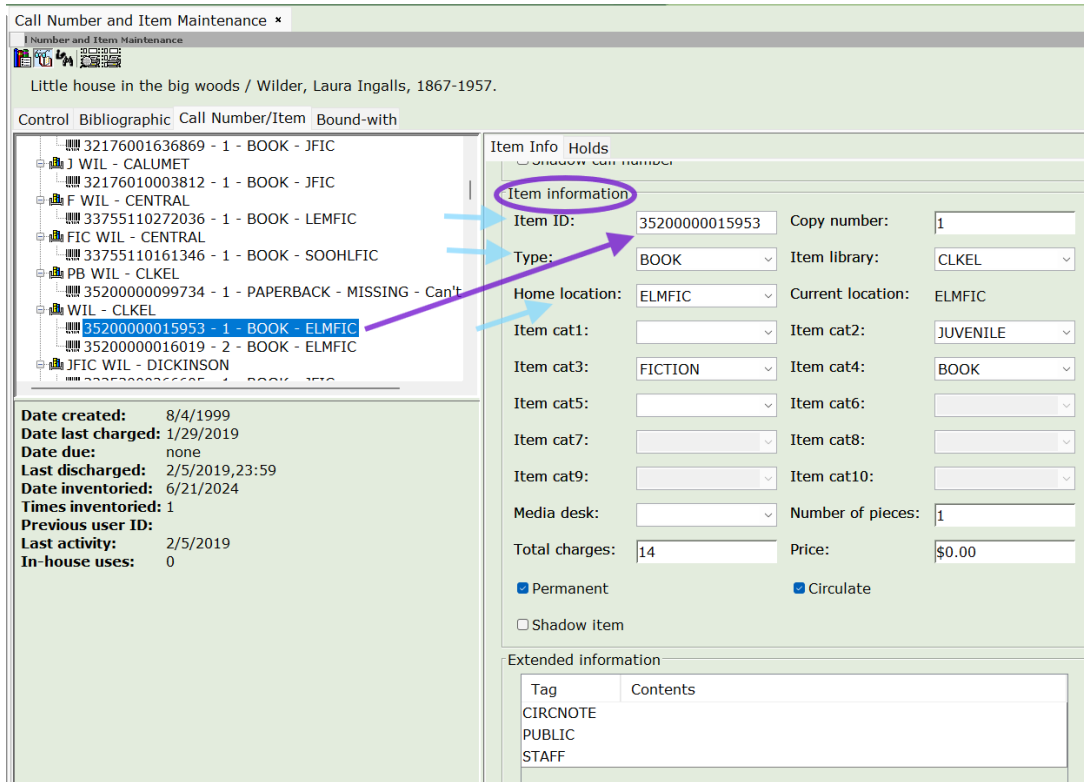
..	Tag	Ind.	Contents
	020		0545033624
	020		0060522364
	020		9780060522360
	043		n-us-wi
	055	3	PS3545.I2692 bL58 1953
	082	00	[Fic]
	100	1	Wilder, Laura Ingalls, d1867-1957. ←
	245	10	Little house in the big woods / cLaura Ingalls Wilder ; <u>illustrated by Garth Williams.</u> ←
	250		Newly illustrated, uniform ed.
	260		New York : bHarper & Bros., c1953.
	300		<u>238 pages</u>  billustrations ; c21 cm. ←
	336		text btxt 2rdacontent
	337		unmediated bn 2rdamedia
	338		volume bnc 2rdacarrier ←
	490	1	Little House
	521	8	930 bLexile.
	520		A year in the life of two young girls growing up on the Wisconsin frontier, as they help their mother with the d enjoy their father's stories and singing, and share special occasions when they get together with relatives or n

- **Manifestation** is more specific than format. Think of a work that has been around for a long time like *Little Women* by Louisa May Alcott or *Huck Finn* by Mark Twain. There's the original work, original illustrations, original pagination. Editions with different pagination and illustrations. Then there are modernized versions of the book and simplified versions. Then there are the movies with different directors and actors. Movies in DVD and BluRay. Movies on multiple discs or a single disc. Movie soundtracks. Audiobooks. Each manifestation gets a separate bib record.

- II. **Call number records:** These very brief records assign a record to specific library and to a specific call number. One library might have multiple call number records if they have multiple copies of an item in multiple locations such as *The Hobbit* in both juvenile and adult collections.



- III. **Item records:** These records contain the information for an individual item and control how a single copy of a title is used or maintained by a single library.



**Main components of item records:**

- **Item ID** this unique number will be affixed to the item with a barcode sticker. Assigning an Item ID with a barcode number is the step that enables an item to circulate. This is the number that gets scanned off an item during checkout, and it's how the system tracks the status of an item.
- **Item Type** is the part of the item record that drives the circulation rules. Your library will have a select list of choices in a drop-down menu of Item Types. The word “type” can be confusing because “Book” to you or me may mean a thing with pages that is read or looked at, but to the system it means something like this: checks out for 3 weeks, can be renewed 1 time, late fine is 25 cents/day. Your library chooses the behavior for your Item Types. We can modify the rules upon request.
- **Home Location** generates the message in the OPAC for the location of the item. In the example above, the Home Location ELMFIC generates the message Elementary School Fiction in the public catalog.

Available:59			
Library	Call Number	Material Type	Location
CLK Elementary Library (Calumet)	WIL	Book	Elementary School Fiction
CLK Elementary Library (Calumet)	WIL	Book	Elementary School Fiction

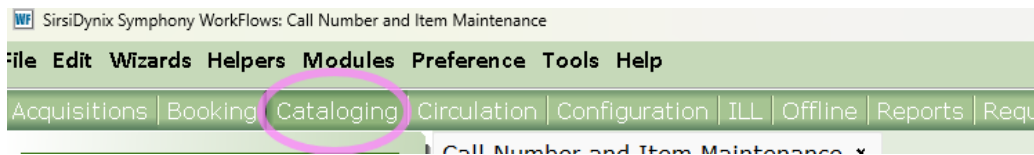
- **Item cats** are useful for statistics and lists. Item cats 2-4 are most commonly used. Item cats can also be used to keep track of items paid for by major doners or items that require a fee for check out.
- **Price** The amount entered here is the amount the patron will be charged if they lose the item. Some libraries use the list price when the item is added, some round up to account for processing costs, some use a few standard prices—one price for all hardcover books, one for all paperbacks.
- **Extended information allows for notes about the item.** If there is something unique about your library's copy – book signed by the author, cake pan in a hanging bag, or donated in memory of \_\_\_\_\_ -- you can add a note here.

## Part 2: Step by step - How to Add an Item or Call Number:

**Prep work:** You will need ...

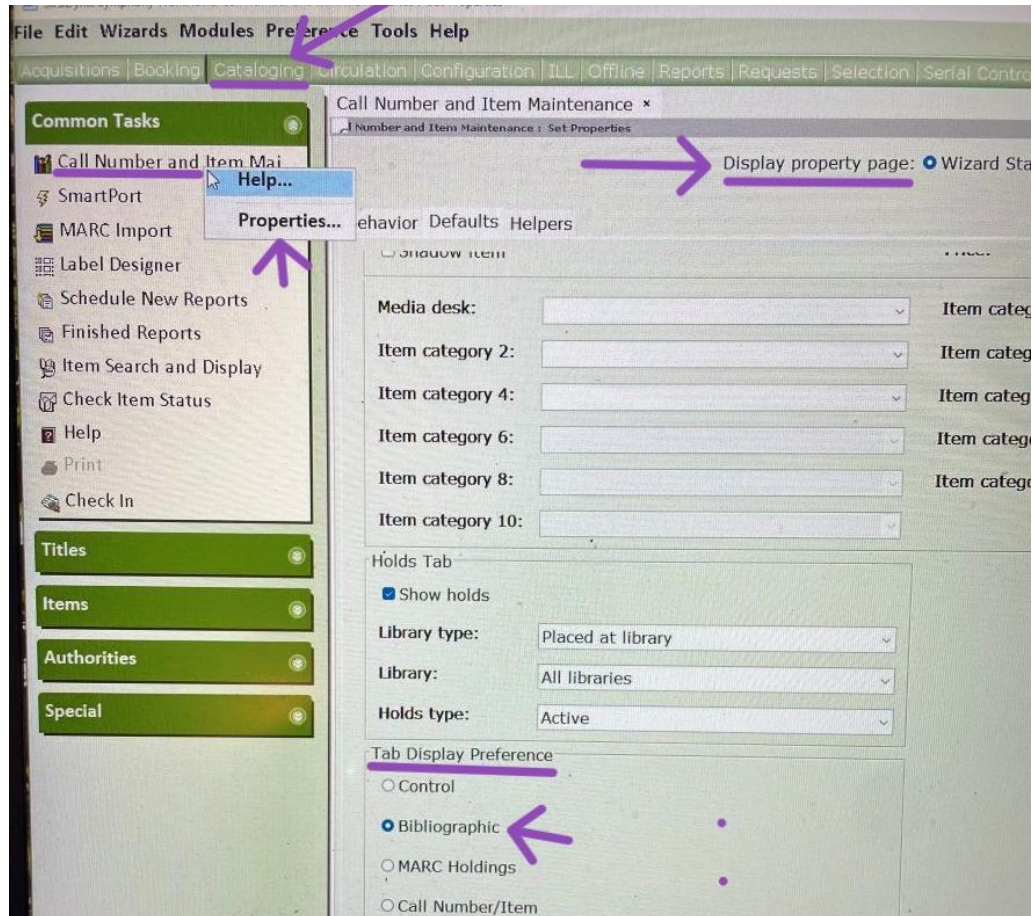
- some uninterrupted time,
- barcode stickers,
- ownership stamps or other labels used by your library,
- items to add sorted by collection,
- barcode scanner,
- an understanding of the Item Types, Locations, and other cataloging standards used by your library. (See the [Item records by collection spreadsheet template](#) for a sample guide.)

1. Select from second-from-the-top-row menu: **Cataloging**



2. Click **Call Number and Item Maintenance Wizard** from menu on the left
  - **Set Properties** (if not already set): When the wizard opens in a new window, it will either display the **Properties** page or a search screen.
    - The Properties page contains options for default functionality and display.

- You can set Properties so this page doesn't open every time you access the wizard (recommended), and you can re-access the properties page at any time by right-clicking the link to the wizard to get the pop-up menu in the image below.



- Set Properties (*Likely, these will be preset for your library by UPRLC*)-This step only needs to be done once, but it's handy to know you can always adjust these settings or ask us to help you do this.
  - Search preferences
    - Type = Keyword
    - Index = General
    - Library = Full access to all libraries
  - Editor display options
    - MARC View [Check]
    - Display Descriptive Labels [Check if you're not used to working with a MARC record]
  - Call number/item default values
    - Library = [Your Library Name]
    - Class Scheme = Dewey
  - Item required default values

- Type = [your most used type, probably BOOK]
    - Home Location = [your most used Location]
  - Tab Display Preference
    - Set to Bibliographic
  - Save!
3. **Search for a bibliographic record** that matches your item
- First try searching by ISBN (publisher barcode on the back of book),
    - In the **Index** field, select the “**General**” from the drop-down menu (arrow at the end of the field)
    - **Type** of search is **Keyword**
    - Find the ISBN on the book—scan or type number without spaces or dashes
    - Click the Search button

The screenshot shows a web application window titled "Call Number and Item Maintenance \* Item Search and Display \*". The search form includes the following fields and options:

- Search for:** 9780061906220
- Index:** General
- Library:** ALL
- Current:** Litwin, Eric. --- Pete the Cat : I love my white shoes --- JE DEA ----...
- Type:**
  - Keyword
  - Browse
  - Exact

Three pink arrows point to the search input field, the "General" index dropdown, and the "Keyword" radio button.

- If the system finds a matching ISBN, a record will open
- If the ISBN is not recognized, it will drop you into a subject list
  - **If not found by ISBN, do a Title/Browse search**

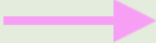
The screenshot shows the same search form as above, but with the following changes:

- Search for:** pete the cat
- Index:** Title
- Type:**
  - Keyword
  - Browse

Two pink circles highlight the "Title" index dropdown and the "Browse" radio button.

- Select the title from the list, Click Modify
- If you find a matching record with title (same page count, same illustrator, same general description), but not same ISBN, add your item per instructions below and email [support@superiorlandlibrary.org](mailto:support@superiorlandlibrary.org) with your ISBN and your item ID. We will add your ISBN to the bib record.

Pete the cat. Five little pumpkins	Dean, James...	004-008.	2015	31
Pete the cat : construction destruction	Dean, James...	Ages 4-8.	2015	22
Pete the cat : Pete at the beach	Dean, James...		2014	16
Pete the cat : Pete's big lunch [braille]	Dean, James...		2013	1
Pete the cat. Rocking in my school s...	Litwin, Eric.	audio disc	2011	12
Pete the Cat : I love my white shoes	Litwin, Eric.	Ages: 003-007.	2010	33



Pete the Cat : I love my white shoes / Litwin, Eric.

Control Bibliographic Call Number/Item Bound-with

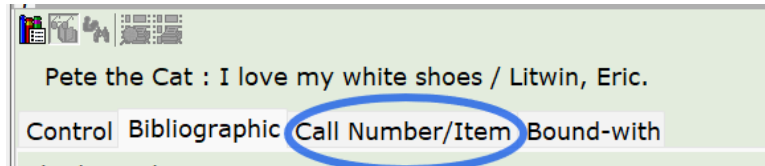
Shadow title: N

..	Tag	Ind.	Contents
	020		9780061906220
	020		0061906220
	020		9780061906237 (lib. bdg.)
	020		0061906239 (lib. bdg.)
	035		(Sirsi) o529761572
	035		(Sirsi) o529761572
	040		GCmBT beng cJFN dJFN dOCLCQ dBTCTA dXY4 dYDXCP dB2A
	050	14	PZ7.L7375 bPe 2010
	082	04	[E] 222
	100	1	Litwin, Eric.
	245	10	<u>Pete the Cat : I love my white shoes</u> / cstory by Eric Litwin (aka Mr. Eric) ; art by James Dean.
	246	30	I love my white shoes
	250		1st HarperCollins ed.
	260		New York : bHarper, c2010, c2008.
	300		<u>1 v. (unpaged)</u>  bcol. ill. ; c29 cm.
	336		text 2rdacontent
	337		unmediated 2rdamedia
	338		<u>volume</u> 2rdacarrier
	490	1	Pete the Cat
	500		Originally published: Atlanta, Ga. : Blue Whisker Press, c2008.
	520		Pete the Cat gets into colorful adventures while out walking in his new white

Review the information in the catalog record Bibliographic tab, and verify record matches item in-hand. Check the following:

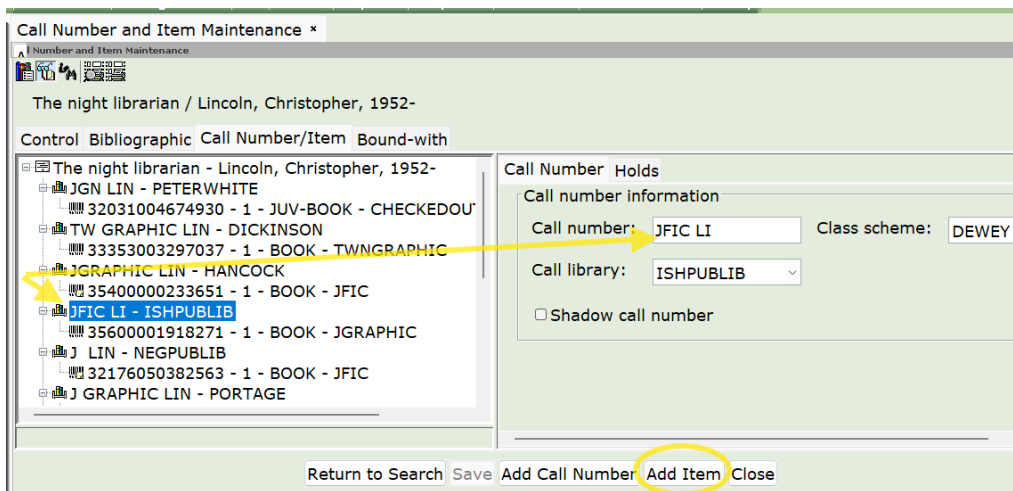
- 100 line for the Author
- 245 line for the title information
- **300 line for the description—page count**
- **338 line for the format** (volume = book)
  - The biggest, most common error is to add an item to a record that matches on title and not format

- If not the correct record, click **Return to Search** at the bottom of screen
  - **If you can't find a record**, request one (use this jotform: <https://form.jotform.com/260285389598173>).
- If the description in the bib record matches, you're ready to add, click the Call Number/Item tab at the top of the screen



4. **If your library already has a copy with the correct Call Number:**

- Select your library/call number in the left-hand window
- Click the **Add Item** button (at the bottom)



- Enter Item information on the right-hand side – Click **SAVE** when completed
- Notice that most of these fields have drop-down menus that provide the options available

Number and Item maintenance

The night librarian / Lincoln, Christopher, 1952-

Control Bibliographic Call Number/Item Bound-with

The night librarian - Lincoln, Christopher, 1952-

- JGN LIN - PETERWHITE
  - 32031004674930 - 1 - JUV-BOOK - CHECKED
- TW GRAPHIC LIN - DICKINSON
  - 33353003297037 - 1 - BOOK - TWNGRAPHIC
- JGRAPHIC LIN - HANCOCK
  - 35400000233651 - 1 - BOOK - JFIC
- JFIC LI - ISHPUBLIB
  - 35600001918271 - 1 - BOOK - JGRAPHIC
  - 2 - BOOK - STACKS**
- J LIN - NEGPUBLIB
  - 32176050382563 - 1 - BOOK - JFIC

Date created: 2/23/2026  
 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

Item information

Item ID: LIBRARY BARCODE Copy number: 2

Type: BOOK Item library: ISHPUBLI

Home location: JUVENILE Current location: STACKS

Item cat1: Item cat2: JUVENILE

Item cat3: FICTION Item cat4: BOOK

Item cat5: Item cat6:

Item cat7: Item cat8:

Item cat9: Item cat10:

Media desk: Number of pieces: 1

Total charges: 0 Price: \$0.00

Permanent  Circulate

Shadow item

Extended information

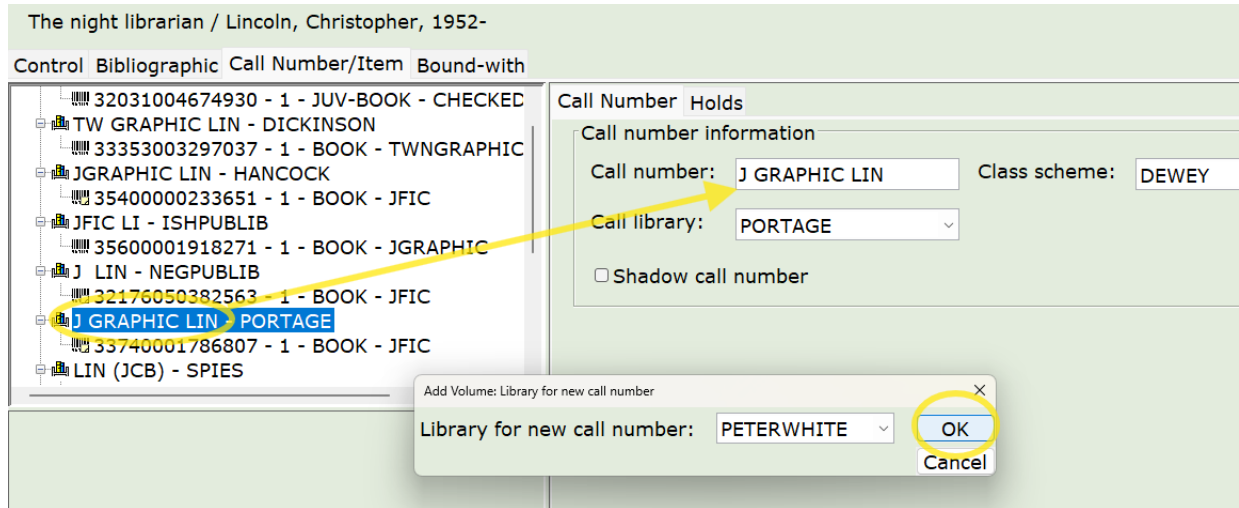
Tab Contents

- Item ID = Barcode number for your library
- Copy number = will automatically update
- Type = Item format or media type
- Library = Your Library name
- Home location = Where it will be located within your library
- Category 1 = only for special collections
- Category 2 = Reading level (Adult, Juvenile, Young Adult)
- Category 3 = Fiction, Nonfiction, Not-app, or Unknown
- Category 4 = Format (Book, Blu-Ray, CD, DVD, etc)
- Media desk = Do not use
- Number of pieces = Enter number of pieces (i.e. for books on cassette)
- Total charges = Number of times checked out up to this point (not usually needed)
- Price = Only enter a price if you want to override the default price
- Permanent = Uncheck if item is part of a temporary collection
- Circulate = Uncheck for Non-circulating
- Shadow = Check if you don't want patrons to see the item in the public catalog
- CIRCNOTE = Alerts staff each time the item is checked-in or out
- PUBLIC Note = Note visible in the public catalog, UPCat
- STAFF Note = Note only visible to staff via Workflows

- **Tip:** Create a cheat sheet like the [Item records by collection spreadsheet template](#) that you can refer to so you know going in what you want to enter into each field.

**5. If your library does not already have a copy but the call number exists for a different library:**

- Select the call number in the left-hand window (regardless of the library name)
- Click **Add Call Number**
- Your library name will appear in a pop-up; click OK to create a call number record
- Enter Item information (see step #7) – Click **SAVE** when completed



**9. If your library does not already have a copy and/or the call number format you want does not exist:**

- Select the Title in the left-hand window
- Click **Add Call Number**
- Click OK when your library's name pops up
- Modify the call number –
  - Select the call number you wish to change (in the left-hand window)
  - Edit the call number in the right-hand window
- Enter Item information (see step #7) – Click SAVE when completed
- Click Save
- Look it all over and edit as needed.

Now you're ready to add another item.

Send all questions and requests for help or support

Revised 2/24/2026eem