

## How to Catalog E-Readers in WorkFlows

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If you have questions, please contact Erica at [elaughlin@alliancelibrarysystem.com](mailto:elaughlin@alliancelibrarysystem.com) or 309-694-9200 ext. 2121.

### Before you begin:

- You will assign the EQUIP-READ item type code when cataloging an e-reader in WorkFlows. Before you begin using the EQUIP-READ code, you must contact JT at [jemert@alliancelibrarysystem.com](mailto:jemert@alliancelibrarysystem.com) or 309-694-9200 ext. 2136. Tell JT how the EQUIP-READ item type code should be entered into your library's circ map (its fine structure, loan period, renews, max charges, etc.).
- Is the item type or item category 1 drop-down menu in Workflows customized to only include those codes your library assigns to its materials?
  - If either menu is customized, ask JT to edit the menu to include the item type EQUIP-READ and the item category 1 code EQ-EREADER.
  - Your library may choose to assign the EQUIPMENT item category 1 code, rather than EQ-EREADER. If your library will use the EQUIPMENT item category 1 code, EQ-EREADER does not need to be added to your drop-down menu.
  - All edits to drop-down menus take overnight to go into effect.
- Let JT know whether only your library's patrons or other libraries' patrons can place holds on e-readers. If you shadow the e-reader's record in WorkFlows, you will not need a hold rule because patrons will not be able to see the e-reader in the RSACat to place the hold.
- If your library wants the e-reader's brief record to include the titles that are loaded on it, please submit a list of the titles to Erica at [elaughlin@alliancelibrarysystem.com](mailto:elaughlin@alliancelibrarysystem.com). She will add the titles to your e-reader's brief record so they are searchable in both WorkFlows and the RSACat.
  - If your library uploads different titles to the e-reader, submit a list of the newly loaded titles to Erica. Only RSA staff can edit the titles on a brief record. *Do not remove the brief record and enter a brief record with the new titles.* Removing the brief record will erase the e-reader's usage statistics.

## Instructions to catalog the e-reader:

1. Open the Cataloging Module.
2. Open the Add Title wizard in the Titles toolbar.
3. On the Bibliographic tab, go to the line that contains "REQUIRED FIELD."  
Backspace "REQUIRED FIELD."
4. Turn your Caps Lock key on. All words on this screen must be entered in upper case.
5. Type the title in this format: E-READER MANUFACTURER/MODEL FOR YOUR LIBRARY
  - Example: AMAZON KINDLE FOR RESOURCE SHARING ALLIANCE
6. Leave the other fields on this screen blank.
7. Check the "Shadow title" box at the top of the screen if you do not want the e-reader to appear in the RSACat.
8. Click on the Call Number/Item tab.
9. In the Call Number box, enter a call number for your e-reader.
  - If your library has more than one e-reader, enter a number after the base call number (KINDLE #1, KINDLE #2, KINDLE #3, etc.)
  - *All of your library's e-readers that are the same manufacturer and model should be attached to a single brief record.*
  - Whatever you choose for the call number, please be consistent with all your e-readers.
10. Scan or type the item ID.
11. From the item type drop-down, select EQUIP-READ.
12. Select a home location for the e-reader.
13. REQUIRED: Select either EQ-EREADER or EQUIPMENT for item category 1.  
This code is used for statistics.
14. REQUIRED: Select EQUIPMENT for item category 2.
15. Enter the number of pieces included with the e-reader. This means the number of pieces that circulate at the time of checkout.
  - Example: An e-reader with a power cord and a protective case would be entered as 3 pieces.
  - When the e-reader is returned, a pop-up box will alert circ staff that multiple pieces are being returned. Staff must enter the override password (i.e., RSA) to close the pop-up. If all of the pieces are not returned, staff should cancel the return and contact the patron.
16. Enter the e-reader's price in the price box. If you do not enter a price, the RSA default price of \$200 will be used if you need to charge a patron to replace the e-reader.
17. Optional: In the "Extended Information" section, you can enter additional information about the e-reader.
  - Example: If you entered 3 as the number of pieces, you could enter the circ note "Make sure power cord and protective case are included."
18. Click the Save button on the bottom of the screen.
19. Click on the Control tab at the top.
20. Change the Record Format to EQUIP. Nothing else needs to be changed on this screen.