

Workflow for Work Study Students

When to add items and/or item information to the Access database:

- Item from the shelf cannot be found in the Access database (use Find function or arrange records alphabetically by title by right-clicking top of “Title of Work” column and clicking “Sort A-Z” – **Add new item, one record for each copy (1)**)
- Only one copy of the item in your hand is in the Access database, and you see multiple copies (in this case, determine which copy has already been added – using publication date, publisher, ISBN, and/or OCLC number – then add a record for each additional copy – **Add new record(s) (2)**)
- A record already exists for the item you are holding, but the fields are not completely filled out (if Call number, OCLC number, Publisher, and/or Last edited are blank, chances are the record is incomplete and needs to be updated) – **Add item information to existing records (3)**)

If the item is not in the database at all...

(1) How to add items/records to the Access database:



- **First step:** Open Access database
- **Second step:** Open Add/Edit Materials Form and click “Add record” button at top
- **Third step:** Grab the physical item from the shelf – you cannot determine publication date, publisher, or edition statement from just the cover
 - Use copyright page to determine info for fourth step
- **Fourth step:** Look up OCLC record for item in Worldcat
 - Navigate to <http://library.unc.edu> and click the Worldcat link (second row of text under search box)
 - Search for item using title on title page (NOT the title from the cover! They may differ!), author last name, ISBN number, or any other method that works for you
 - Worldcat does not play well with semicolons, so if your item has a secondary title, just leave it off when searching – add other criteria if your search is too broad (like author last name or ISBN)
 - **MAKE SURE YOU CHOOSE THE RIGHT RECORD! THIS IS REALLY IMPORTANT!** Compare the following information between the **physical book** in your hand and the **record on your screen**: Author, publisher, publication date (watch out for printing dates and runs – for example, if something says “First Plume book printed December 1987” and the publisher is Plume, then your publication date would be 1987. If a book says it is a revised/expanded/x-th edition, usually go with the later copyright/publication date. However, if it says “ 2nd/3rd/x-th printing,” don’t worry about this statement. Printing runs are secondary copies of the same publication information, so look for “copyright 19__/20__” or edition statements, like “Bantam edition” with a year to determine the correct copyright date.
 - If you have any concerns about the book you’re looking at, compare OCLC records until you find the one that best matches your book in terms of the other criteria (number of pages, ISBN, publisher, etc.) and go with that one, assuming

Workflow for Work Study Students

the date on the OCLC record is listed somewhere in the publication information in the book), edition, and description (page numbers should be exact, including forewords [xvii], ill. should be listed for books with pictures/graphs/illustrations, and the size should be correct)

- **Fifth step:** Use information from OCLC record to fill in the “Add record” form in Access
 - **Subject category** ideas are generated by: a) going by the subject already assigned to the book (if applicable), or b) subjective judgement – knowledge about the book’s subject can be gained from descriptors in OCLC record or by briefly reading through the item synopsis/chapters/introduction
 - Leave **call number** field blank until item is cataloged in the system
 - For the **author field**, if the author is actually an editor, add “(Ed)” to the end of their name
 - If an **edition statement** is not listed in the OCLC record or item’s publication information, leave this field blank
 - Check for existing copies in the Library Catalog table – if this is the first copy, put a 1 in the **Copy Number** field. If not, put the correct copy number instead. (Each book must have its own record, even duplicate ones!)
 - **OCLC number** can be found at the bottom of the OCLC record, under Accession No.
 - If no OCLC record exists for the item (very rare), put “No OCLC record” in the Additional Notes field
 - For **location**, simply click the words “LGBTQ Center Library”
 - An “Other” option exists just in case, but don’t worry about this
 - The **Additional Notes** field is a catch-all field for extra information that may be necessary to know. Here are some instances you’ll use it:
 - if the book is really warped, water damaged, stained, marked up, or otherwise aesthetically and functionally damaged, make a note of this in the with the date and your initials at the end [Ex) Water damaged 11/26/14 ke]
 - If the book’s Worldcat description says that it is 27cm or larger, add a note which simply says “Oversized” (then put the book in alphabetical order by author last name, located on the spine label, on the oversized shelf by the refrigerator)
 - If the copy in your hands is autographed by the author (yes, this does happen), make a note in the notes field [Ex) Autographed copy]
 - This is a non-exhaustive list, so if you think there’s something about the book in your hands that someone might like to know (like existing damage so that the next person to check the book out isn’t blamed for damaging the book or extensive pen markings in the book), put it in the notes field. Unsure if it’s important? Put it there anyway

Workflow for Work Study Students



- Finally, for the **Last Edited** field, just click on the calendar icon that appears to the right of the field and click today's date
- Once the fields are all filled in (to the degree necessary for the item), click "Add record" again to add the record to the database
- To find the record you just created, click on "Library Catalog" and do one of two things:
 - Either search for the title (full title is required; also ensure that "Look in:" specifies "Current document" so it will search the whole spreadsheet, not just the field your cursor is in), or
 - Sort the Title field A-Z (right-click field heading to do this) and search for the title from the alphabetical list
- Ensure that EACH ITEM has its own line/record – if there are four copies of a book, there should be four records (with copies 1,2,3, and 4 specified)
- **Sixth step:**  [University of North Carolina, Chapel Hill](#)  UNIV OF N CAROLINA CHAPEL HILL
 - If the above green note comes up in the OCLC record, Kai can catalog this item – write down the name of the book and how many copies there are on the paper marked "Books to be Cataloged" – stored between the printer and the right computer at the student computer table – and Kai will catalog them
 - If the green note is not present in the OCLC record, the item is likely not owned by UNC – in this case, label the item (if not already labeled) or re-label the item (if the subject category changed from the subject area in which you found it)
- **Seventh step:** Shelf/store book in the appropriate section
 - If the book is labeled using subject categories, shelve in the correct subject area
 - If the book is owned by UNC and you wrote the title down on the "Books to be Cataloged" list (BTBC), you can either stack it up on top of/behind the BTBC list or put it back on your shelf (if it belongs to a new subject area, please stack it up and don't put it back on the shelf)

If the material is already in the Access database...



(2) How to add records for additional copies:

- **First step:** Locate existing record and click on the gray, blank square to the left of the subject category column – this should highlight the entire record
- **Second step:** Copy (Ctrl +C) the record, then scroll down to the very bottom of the table, click on the gray square with the asterisk (*), and paste (Ctrl+V) the record – this should insert all the information as a new record
- **Third step:** Edit this newly-created record with the correct information (publisher, edition, publication date, OLCLC number, copy number, and ISBN will/may differ, so check the physical copy and use the copyright page to compare) – follow steps **four** and **five** from **method one** (previous section) to choose the right OCLC record from which you will take your information

Workflow for Work Study Students

- **Fourth step:** To integrate this new record back into the table with its counterparts, scroll back up to the very top of the table, right-click top of “Title of Work” column and click “Sort A-Z”
- **Fifth step:**  University of North Carolina, Chapel Hill  UNIV OF N CAROLINA CHAPEL HILL
 - If the above green note comes up in the OCLC record, Kai can catalog this item – write down the name of the book and how many copies there are on the paper marked “Books to be Cataloged” – stored between the printer and the right computer at the student computer table – and Kai will catalog them
 - If the book is owned by UNC and you wrote the title down on the “Books to be Cataloged” list (BTBC), you can either stack it up on top of/behind the BTBC list or put it back on your shelf (if you changed the subject category, please stack it up and don’t put it back on the shelf)
 - If the green note is not present in the OCLC record, the item is likely not owned by UNC – in this case, just re-shelve the material where it belongs

(3) How to add information for existing items:

- **First step:** Locate existing record with incomplete information – these are usually records missing info in the following fields: *Call number, OCLC number, Publisher, and/or Last edited*
- **Second step:** Follow steps **four** and **five** from **method one** (“not in the DB at all” section) to choose the right OCLC record from which you will take your information
- **Third step:** Fill existing record fields with information from the correct OCLC record (CHOOSING THE CORRECT RECORD IS SUPER IMPORTANT! If you have any concerns about the item/record you’re looking at, let Kai know and they will happily help you choose the correct one)
- **Fourth step:**  University of North Carolina, Chapel Hill  UNIV OF N CAROLINA CHAPEL HILL
 - If the above green note comes up in the OCLC record, Kai can catalog this item – write down the name of the book and how many copies there are on the paper marked “Books to be Cataloged” – stored between the printer and the right computer at the student computer table – and Kai will catalog them
 - If the book is owned by UNC and you wrote the title down on the “Books to be Cataloged” list (BTBC), you can either stack it up on top of/behind the BTBC list or put it back on your shelf (if you changed the subject category, please stack it up and don’t put it back on the shelf)
 - If the green note is not present in the OCLC record, the item is likely not owned by UNC – in this case, just re-shelve the material where it belongs

FINAL STEP FOR ALL THREE: MAKE SURE TO SAVE THE DATABASE WHEN YOU’RE DONE!