

Item Record sets and bulk change

Bulk change item records

You can gather items for bulk change in a record set, and then bulk change them. Or, you can bulk change items by selecting them in a linked list box from a bibliographic record

1. Select the item records to change, and open the Bulk Change dialog box using one of the following methods:

Tip:You can create an item record set from a bibliographic record set by clicking on the Bibliographic Record Set workflow. The item record set will contain all the items linked to the bibliographic records in the record set.

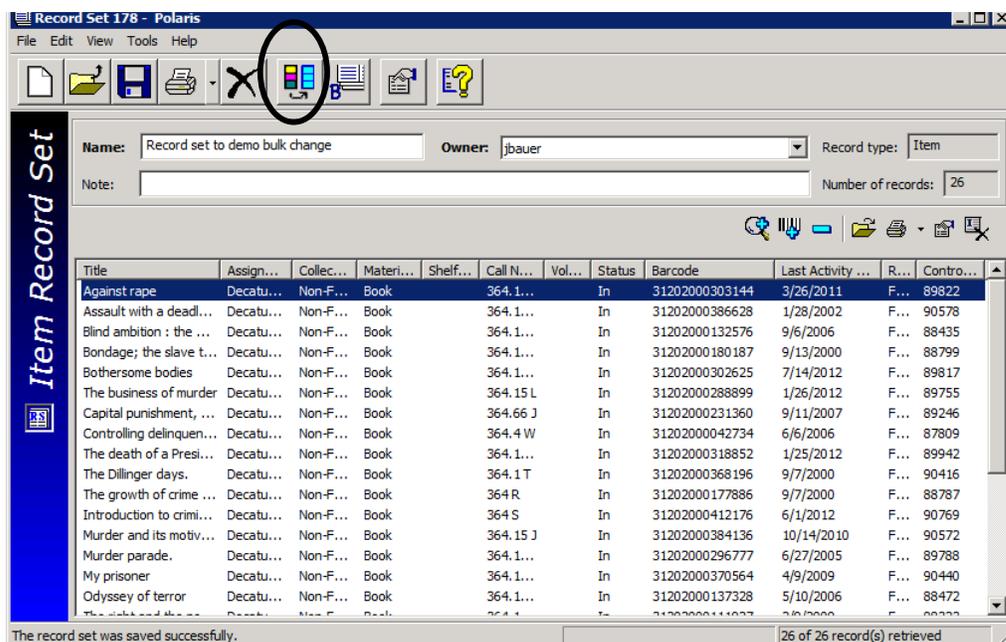
a) If the items are in a record set, open the record set, and select **Tools, Bulk Change**, press **CTRL+B**.

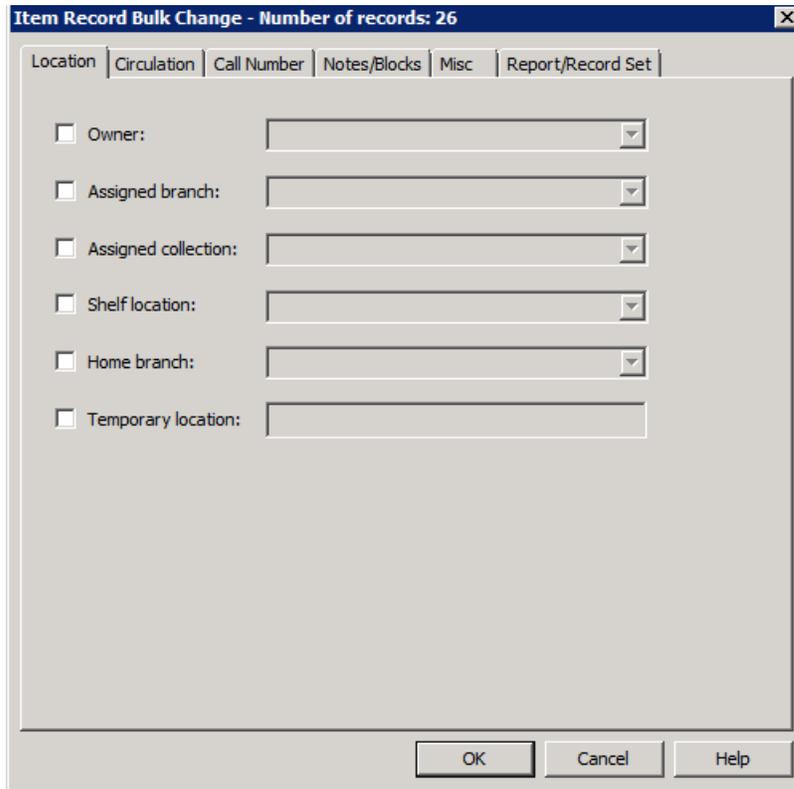
b) If the items you want to change are not in a record set, access the item linked list box by one of the following methods:

- Select **Links, Item records** from the workflow menu on the Bibliographic Record, Purchase Order, or Purchase Order Line Item workflow.
- Select a purchase order line item from the Purchase Order workflow, Line Items view, or from the Find Tool results list, right-click and select **Links, Item Records** from the context menu.
- Select a segment in the Purchase Order Line Item workflow, right-click and select **Links, Item records** from the context menu.

Then, select the items to bulk change in the item list box, right-click and select **Ad hoc Bulk Change**.

The Bulk Change dialog box appears.





2. Select one of the following tabs to change fields for all the item records in the record set or for all the items selected in the linked list box:

a) **Location** - Use this tab to change the item records' location information.

- To change the items' location information, select the **Owner**, **Assigned branch**, **Assigned collection**, **Shelf location**, or **Home branch** box, and select a corresponding value from the list.
- To enter a temporary location for the items, select **Temporary location**, and type the location. If you leave the text field blank, the **Temporary location** will be blank in all the item records in the record set.

b) **Circulation** - Use this tab to change the item records' circulation information.

- To change basic circulation information, select the **Circulation status**, **Material type**, **Loan period code**, **Fine code**, **Statistical code**, or **Renewal limit** box and select a corresponding value from the list.
- To allow or disallow holds on the items, select the **Holdable** box. Then, select the check box to allow holds on the items, or leave the check box blank to prevent holds on the items.
- To change hold limits, select the **Holdable** box and select the check box to allow holds. Then, select one of the hold limit settings, and select the check box to the right of the setting to limit the holds, or leave the right check box empty to deselect the limit

Example:

To allow all items in the record set to be held and then picked up at any library, select the **Holdable** check box, select **Pickup at this branch**, but leave the check box to the right empty. This will clear the **Pickup at this branch** setting for all items in the record set that have this limit setting selected.

- To change the **Non circulating** setting for all item records, select the **Non circulating** box, and either select the check box to the right or leave it blank. If you select the check box, all the items in the record set will not circulate. If you leave the check box blank, all the items will have the **Non circulating** check box unchecked, allowing them to circulate.

c) **Call Number** - Use this tab to change the item records' call number information, or to assign call numbers to the item records.

d) **Notes/Blocks** - Use this tab to change the item records' notes and blocks.

- To change the notes information for all item records in the record set, select **Public note**, **Non-public note**, or **Physical condition**, and type the text in the box to the right of the note you selected. Then, select **Replace** to replace any existing notes with the note you typed, **Prepend** to add the notes to the beginning of any existing notes, or **Append** to add the notes to the end of any existing notes.

- To change a library-assigned block, select the **Library assigned** check box, and select a value from the list box to the right.

- To change a free-text block, select the **Free text block** check box, and type the text for the free-text block you want to add. Then, select **Replace** to replace the text for any free-text blocks, **Prepend** to add the text to the beginning of any existing free-text blocks, or **Append** to add the text to the end of any existing free-text blocks.

e) **Misc** - Use this tab to change miscellaneous information on the item records, or to assign barcodes to items that do not have a barcode.

- To change the **Display in PAC** setting for all item records in the record set, select the **Display in PAC** box, and select the check box to the right, or leave it blank. If you select the check box, all the item records will have the **Display in PAC** setting checked, which means they will all display in the PAC. If you leave the check box blank, all the item records will have the **Display in PAC** setting unchecked, which means none of the items will display in the PAC.

- To change the funding source for all the item records in the record set, select **Funding source**, and type a value. If you leave the text field blank, the **Funding source** field will be blank in all items in the record set.

- To change the price of all the items, select **Price** and type the price. If you leave the text field blank, the **Price** field will be blank in all the items in the record set.

3. Click **Report/Record Set** tab to specify the bulk change report and error record set.

a) If you want to change the default report name, type the location and file name, or click **Browse** to locate the file.

The report also shows errors for items that could not be bulk changed either due to their status or lack of permissions.

b) To create a record set of the items for which the changes could not be made, select the box under **Error Record Set**, type a name for the record set in the **Name** box and select an owner in the **Owner** box.

Note:

An error record set is not required. However, specifying an error record set makes it easier to locate the item records that have errors. If no errors are found, no error record set is created.

4. Click **OK** or press **Enter** to start the bulk change process.

The Summary of Changes message box displays the following details:

- The number of item records to be changed
- The name and owner of the record set that contains the item records being changed
- The error record set name and owner, if the error record set is requested
- The path and file name specified for the bulk change report
- A summary of all the fields to be changed and their new values

Tip:

To return to the Item Record Bulk Change dialog box to change any of your settings, click **Cancel**.

5. Click **Continue**.

The bulk change process applies the changes to the item records. A message informs you when the bulk change process is finished and indicates if there were errors.

6. Click **OK** to close the message box.

After the bulk change process, the list display is updated as follows depending on whether changed the items from a record set or from a list:

- **Record set** - The record set workform is refreshed and sorted by the default sort order. You can re-sort the list in barcode order.
- **Item list using Ad hoc Bulk Change** - The list view is refreshed immediately after the Ad hoc Bulk Change, and you can see the results of the bulk change to fields that display in the list view. If the bib control number was changed, the new title displays in the list view.