

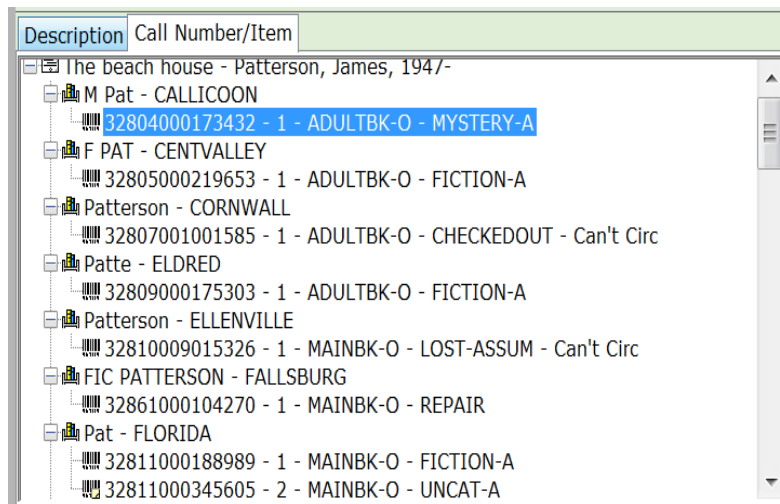
6. ITEM RECORDS

Item records allow for the location, circulation and inventory control of all physical items owned by library. Item records contain fields that indicate the shelf location of the item, its current temporary location, statistical fields used for reports, a field that helps determine circulation rules, and date fields and counters that track current and past activity.

Item records do NOT describe the contents of an item. An item's title, author, subject headings, publisher name and place, date of publication, etc., is found in bibliographic records (also known as MARC records or (in Symphony) as Title Records).

Symphony also makes a distinction between call numbers and item records. In many integrated library systems (other than Symphony), the call number is simply a field found within an item record.

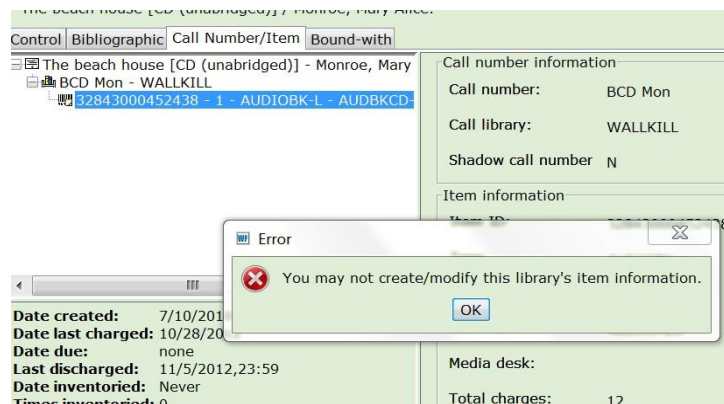
In Symphony, Call Number records are separate from item records. On item search Call Number/Item screens, the distinction is made clear by the graphical representation:



In this example, "The Beach house" on the top represents a Title record; the call numbers with library names represent Call Number records; and subordinate to Call number records are Item records. In this example, you can see that the FLORIDA library has two copies of this title and both copies have the same call number. So in FLORIDA's case, there is one call number record with two item records attached to it.

6.1 Add Item (additional copies-same call number)

The difference between Item Records and Call Number records becomes more apparent when we look at the item creation and editing routines available in Symphony. There is one routine called the Add Item wizard can be found in the Circulation module under the Item wizard group and in Cataloging under Common Tasks. The Add Item wizard is only useful if you are adding additional copies of a title you already own—and your new copy will be given the exact same call number as your existing copies. Add Item does not allow you to create a new item record if your library does not already own a previous copy. Moreover, if your library already does own a previous copy, Add Item will not allow you to create a second copy with a differing call number.



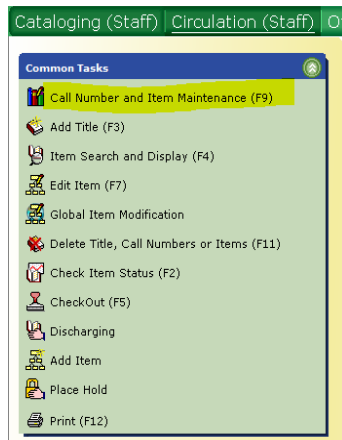
The screen shot above shows the error message that occurs if you try to add a new item and your library does not yet have any previous copies.

6.2 Edit Item (changes to existing Item records)

The Edit Item wizard found in the Common Tasks wizard group in Cataloging has a similar limitation. It only allows you to edit existing items owned by your library. Edit Item allows you to change fields in an item record, but not fields in a call number record. It does not allow you to create a new item record.

Because Add Item and Edit Item are limited to item records and don't include call number records, we think few ANSER libraries will use these wizards on a regular basis.

6.3 Call Number and Item Maintenance

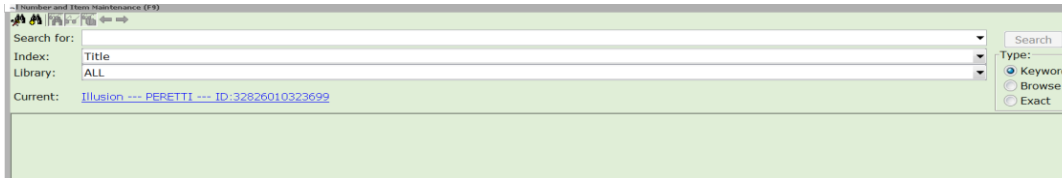


The Call Number and Item Maintenance wizard found in the Common Tasks group in Cataloging allows you to edit existing call number records and item records belonging to your library; and to create new call number records and items records for your library. It restricts you from changing call number records or item records belonging to other libraries.

If you are trying to add a new item and the title (bibliographic) record is already in the catalog, this wizard will allow you to find the title record.

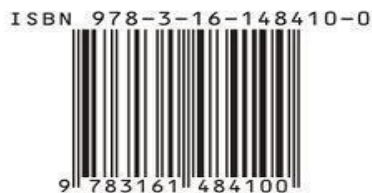
When creating a new item record, the Item Type, Library, Current Location, Item Category 1 and Item Category 2 are pre-filled with default values for your library. Those defaults can be changed at the "Set Properties" screen (seen when you first open the Call Number and Item Maintenance wizard) to reflect the type of material you add most often.

6.3.1 Call Number and Item Maintenance - Searching



Although WorkFlows catalog searching is covered in the Essential Skills (Section 2) part of the ANSER manual, there are specific search strategies that should always be followed when searching for a Title Record to link new items to.

1. **For books, search first by ISBN number (International Standard Book Number).** ISBNs are assigned by publishers to the editions of works they publish. Nearly all books have an ISBN, but only a few music CDs and DVDs have ISBNs. For those, it might be more productive to search first by title (see below). On books, the ISBN is usually found on the outside cover (back cover, most often) and may be rendered in numbers above or below a barcode.



Several years ago, some publishers found that their 10-digit ISBNs scheme was running out of numbers, so they expanded the ISBN to 13 digits. However, publishers and libraries have not gone back and retrospectively changed all 10-digit ISBN numbers to 13-digit ISBN numbers. Symphony allows you to search by either a 10-digit ISBN or a 13-digit ISBN.

NOTE: 13-digit ISBNs are NOT just 10-digit ISBNs with the "978" prefix. A 10-digit ISBN and a 13-digit ISBN for the same edition will also differ in the final digit, called a "check digit." Example:

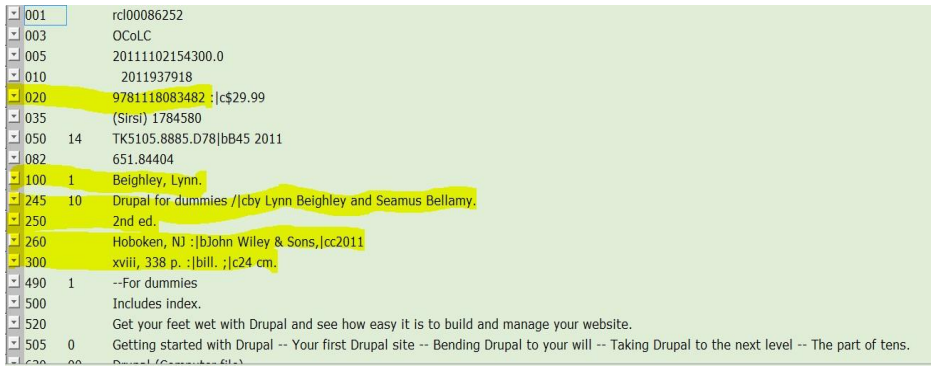
ISBN-10: 1448831873
ISBN-13: 9781448831876

Therefore, it will not work to subtract the 978 to form the 10-digit ISBN from a 13-digit ISBN. Likewise, the 978 cannot be added to a 10-digit ISBN to make it into a 13-digit ISBN. Search for (or enter) ISBNs as you see them printed.

You cannot truncate ISBNs when searching. They must be either 10 or 13 digits long. **Omit any spaces or hyphens from between digits in ISBN searches.**

2. If the ISBN search produces no results, search by Title (keyword or browse). Keep in mind that in WorkFlows, Title Browse searches will not display titles where all copies are Lost, Missing, or Discard.

As you examine search results, you should look at the Bibliographic tab screen to compare details about the title record with the title information you have in hand (either from the item in hand or the review/citation source you are using). In the example below, the critical fields you need to compare are highlighted:



The image shows a screenshot of a library catalog record with several fields highlighted in yellow. The fields and their values are:

001	rci00086252
003	OCOLC
005	20111102154300.0
010	2011937918
020	9781118083482 : c\$29.99
035	(Sirs) 1784580
050	14 TK5105.8885.D78 bB45 2011
082	651.84404
100	1 Beighley, Lynn.
245	10 Drupal for dummies / cby Lynn Beighley and Seamus Bellamy.
250	2nd ed.
260	Hoboken, NJ : bJohn Wiley & Sons, cc2011
300	xviii, 338 p. : bill. ; c24 cm.
490	1 --For dummies
500	Includes index.
520	Get your feet wet with Drupal and see how easy it is to build and manage your website.
505	0 Getting started with Drupal -- Your first Drupal site -- Bending Drupal to your will -- Taking Drupal to the next level -- The part of tens.

020: The ISBN (may not be present)
100: The author name
245: The title
250: The edition statement (may not be present)
260: Publisher name and publication date

In general, the author/title/publisher information should always match. If unsure, contact the RCLS Cataloging department. Note that it is OK to link your items to brief bibliographic title records that other libraries have created (if title/author, ISBN, or Publisher/Pubdate match). We do NOT want to see multiple brief Title Records added for the same work.

6.3.2 Call Number and Item Maintenance – Add Call Number

The display tab to the right of the Bibliographic tab is the Call Number/Item tab.

The screenshot shows a web-based interface for managing library records. The main window is titled "Drupal for dummies / Beighley, Lynn." and has four tabs: "Control", "Bibliographic", "Call Number/Item", and "Bound-with". The "Call Number/Item" tab is active. On the left, a tree view shows a hierarchy of records, with "006.76 BEIGHLEY - TAPPAN" selected. Below the tree, a metadata summary is displayed: "Date created: 9/11/2012", "Date last charged: Never", "Date due: none", "Last discharged: Never", "Date inventoried: Never", "Times inventoried: 0", "Previous user ID:", "Last activity: Never", and "In-house uses: 0". The main content area is divided into sections: "Call number information" with fields for "Call number" (006.76 BEIGHLEY), "Class scheme" (DEWEY), and "Call library" (TAPPAN); "Item information" with fields for "Item ID" (32838009004560), "Copy number" (1), "Type" (ADULTBK-L), "Item library" (TAPPAN), "Home location" (NONFIC-A), "Current location" (NONFIC-A), "Item cat1" (NONFBOOK), "Item cat2" (ADULT), "Media desk", "Number of pieces" (1), "Total charges" (0), and "Price" (\$29.99). There are also checkboxes for "Permanent" and "Circulate". At the bottom, an "Extended information" section contains a table with columns "Tag" and "Contents", listing "CIRCNOTE", "PUBLIC", and "STAFF".

If you have no previous copies of this title, you first need to create a call number record for your library. Click on Add Call Number. You will only be able to select your library at that point. Modify the default call number field to match the call number you want to assign to this title (for instance, 006.76 BEI). You don't need to change the Classification scheme from DEWEY.

ANSER does not have any guidelines for how your call numbers are formulated, i.e. the prefixes you may use, the number of digits in your Dewey numbers, or the length of the Cutter (author indication).

However, ANSER does have very strict standards for volume statements (also referred to as |z analytics or "pipe z") that are added to the call number field for book sets, video sets, and serial publications. Those standards are described in Section 6.3.

6.3.3 Call Number and Item Maintenance – Add Item Record

Continue down to the Item Record section and enter an **Item Id** (library item barcode number).

Item information	
Item ID:	<input type="text"/>
Type:	*****
Home location:	FICTIONN-A
Item cat1:	FICTBOOK
Media desk:	<input type="text"/>
Total charges:	0
<input checked="" type="checkbox"/> Permanent	<input checked="" type="checkbox"/> Circulate
<input type="checkbox"/> Shadow item	
Extended information	
Tag	Contents
CIRCNOTE	
PUBLIC	
STAFF	

If you have the physical item you are linking in hand, you can apply a barcode number (which begin 328...) and enter that as the Item ID. If you are entering the item prior to having it in hand, you may enter any placeholder number. We recommend your three-letter library code followed by the current time. Example: WAR084801202013 (8:48 on 1/20/13). Using this format guarantees that you would not duplicate a number.

The **Copy number** refers to the number of copies owned by your library (on the same call number record). "Copy number" is NOT a free text field, and does not serve the same function as the "Copy Statement" field in Horizon.

The **Type** field is the Item Type. System-wide there are about 170 different Item Types, but each ANSER library only uses between 5 and 35 Item Types. The drop-down list of Item Types only displays the Item Types identified for use at your library. Item Types are factors in setting up Symphony's Circulation and Hold rules, so a library cannot start using any other Item Types than those listed until RCLS ANSER administrators have established those rules.

Item ID:	<input type="text"/>
Type:	NBOOK-L
Home location:	AUDIOBK-O
Item cat1:	DVDSET-O
Media desk:	ILL-X
Total charges:	LANGUAGE-L
<input checked="" type="checkbox"/> Permanent	MAINBK-L
<input type="checkbox"/> Shadow item	MAINBK-O
	NBOOK-L

A list of all the ANSER Item Types and their descriptions can be found in Appendix 3 of the ANSER Symphony manual.

The **Home Location** field represents the shelf location of the collection where the item is stored in the library. A master list of Symphony location codes is available in Appendix 5 of the ANSER manual. When linking, all of the Home location codes are available for you to use; however, your library likely only uses a portion of the available codes. It is advised that each library keep a manual list of the home locations they use.

The **Current Location** represents where the item is at the current time; therefore it matches the home location if it is on the shelf where it should be; or will indicate a location status such as MISSING, CHECKEDOUT, INTRANSIT, etc. WorkFlows can be set so that when linking a new item the Current Location will match the Home location and can not be edited. However, many ANSER libraries want to link new items as soon as they are ordered, so we have set the Current Location to be editable so that you could change it to indicate ON-ORDER or AVAIL_SOON.

Item Cat1 and **Item Cat2** are statistical fields that are crucial in generating collection and circulation counts for each Library's State Annual Report. Master lists of Item Category 1 and Item Category 2 are available in Appendices 7 & 8 of the ANSER manual.

Remember, when creating a new item record, the Item Type, Library, Current Location, Item Category 1 and Item Category 2 are pre-filled with default values for your library. Those defaults can be changed at the "Set Properties" screen (seen when you first open the Call Number and Item Maintenance wizard) to reflect the type of material you add most often.

The **Number of Pieces** and **Price** fields should be filled in with the appropriate values. Number of pieces is used to indicate the number of discs/cassettes/volumes in an audiobook, DVD set, or book set. If used for mixed media (like Kits), always add an item note to explain the materials included in the Pieces count.

Media Desk is a field that ANSER does not use that cannot be hidden from our screens. The **Total Charges** field indicates the number of checkouts the item has had since it was added to the system. It would normally NOT be edited.

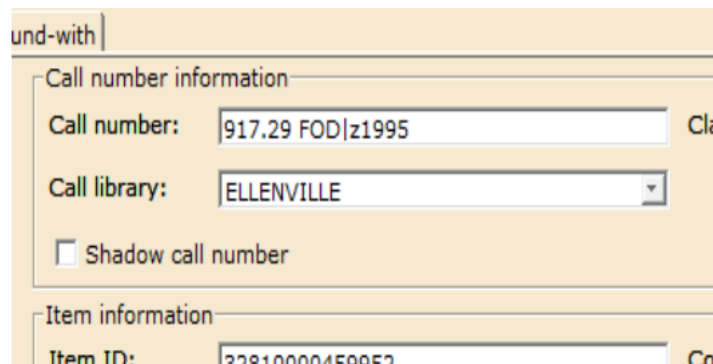
6.3.4 Call Number and Item Maintenance – Volume Analytics

When creating or editing call number and item records for serial publications (annual or irregular editions of the same title) or title sets (book sets, DVD sets), you will need to indicate the edition, part or disc for each piece that is barcoded and circulated as a unit.

*Note that books in series should **NOT** have a volume analytic applied. Book series are works with different titles that are often by one author; fictional series typically share a common setting, story arc, set of characters, or timeline. If you shelve book series in numerical order, it may be helpful for re-shelving purposes if you indicate the series number in the main part of the call number; **but do NOT use the |z to do so.***

Example: "FIC Patterson bk.4" NOT "FIC Patterson |zbk.4"

Symphony does not have a separate field in which to place volume/set information. Instead, the edition/part notation is considered part of the Call number. It is separated from the main call number by a pipe symbol (|) and a lower-case z. In the example Item ID 32810000459952, here is the call number record for Ellenville's Fodor's Caribbean 1995 edition.



The screenshot shows a web form with two main sections: "Call number information" and "Item information".

- Call number information:**
 - Call number: 917.29 FOD|z1995
 - Call library: ELLENVILLE
 - Shadow call number:
- Item information:**
 - Item ID: 32810000459952

In order for Symphony's Volume-level holds function to work, ALL ANSER LIBRARIES MUST ENTER ANALYTICS USING THE SAME CONVENTIONS. Analytics are case-sensitive; for that reason all letters should be entered as lower case (see examples below).

--Year Editions of Serials

Put only the year or range of years. Examples: "|z2005"

"|z2004-2005".

Do not add the word "edition" or "ed." Do not abbreviate years

"04-05".

--Book sets

If the volumes in the set are called "Book", use the format:

"|zbk.1",

"|zbk.2", etc. Do not use the full word "Book".

If the volumes in the set are called "Volume", use the format

"|zv.1",

"|zv.2", etc.

--Numbered Editions of Serials

Our experience has been that numbered editions are unreliable, due to publisher inconsistency in their application, i.e. "1st ed.", "2nd ed." Do not use "ed." or the full word "edition". Instead, use the copyright year as noted above.

--Book or VHS set with "Parts"

Use the format "|zpt.1", "|zpt.2", etc.

--VHS set

Use the format "|ztape 1", "|ztape 2", etc.

--DVD set

Use the format "|zdisc 1", "|zdisc 2", etc. For DVD sets, if you circulate the entire set under one barcode, use the format "|zall discs". If multiple discs (but not the complete set) are barcoded together, use the format "|zdiscs 1-2"

--Blu-Ray/DVD combo packages

Publishers are now issuing movies in packages that combine Blu-Ray discs with regular DVD discs. Because patrons often look for titles in one format or the other, libraries are sometimes splitting up these packages. If items are linked to a title record for a combo package, but barcoded separately for a specific format, use the analytic "|zblu-ray only" or "|zdvd only". Items that are linked to these combo titles records without any |z will be assumed to contain both Blu-ray and DVD discs.

Incorrect:

"|zDisc 1" (cap letter)

"|zdisk 1" (spelling of disc)

"|z disc 1" (Use of space after z)

"|zalldiscs" (No space after all)

"|zdisc 3-4" (singular instead of plural)

"|zdiscs 3&4" (use of ampersand instead of hyphen)
"|all discs" (missing z)

--Periodicals

- Monthly. Use the format "|z2013 02" [YYYY MM]
- Bi-monthly. Use the format "|z2013 03/04" [YYYY MM/MM]
- Quarterly. Use the format "|z2013 01/02/03"
- Seasonally. Use the format "|z2013 Winter" (spell out the season, using consistent case)
- Weekly. Use the format "|z2013 01-15" [YYYY MM-DD]"

Note that there will inevitably be exceptions to the way sets are packaged. For instance, sets within sets. If none of the above conventions appears to fit your item(s), please contact the RCLS Cataloging department.

6.4 Add Title

If the initial search attempted in Call Number and Item Maintenance does not result in a match Title Record to your item, you may use the Add Title wizard to create a new, very brief bibliographic record and to add your call number and item record at the same time. RCLS Catalogers request that these records be entered using ALL CAPS in order to be easily recognizable.

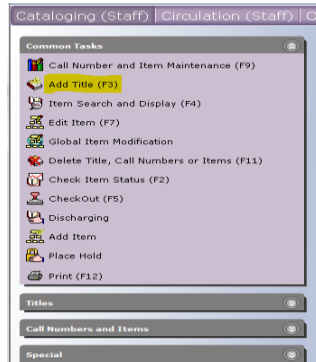
RCLS Cataloging staff will then run reports of all these brief title records and replace them (where possible) with much more complete bibliographic records.

Note that there will be instances where the RCLS Cataloging staff will be unable to find a complete record. In these instances, they will insert a CIRCNOTE into your item record requesting that you send to RCLS a photocopy of the title/verso of title page or cover packaging of AV items. With books they will want a copy of the title page and verso, not the book cover. The catalogers will be looking for more accurate search terms/numbers from the photocopies.

When you act on that request and send the photocopy, you should delete the CIRCNOTE from your item record.

If the photocopies are never sent to RCLS Cataloging, the brief record will never be upgraded to a better record.

1. Click the Add Title wizard in the Common Tasks group in the Cataloging module. [Do NOT use the Add Brief Title wizard in Circulation, which we want to reserve for SEAL ILL items and for Circ desk staff that do not have time to search and link when presented with an unlinked item by a patron].



2. The screen will open to the Bibliographic Tab. Skip over entry of any fixed field data and move the cursor to the long contents field entry section for the ISBN line, tag 020. Enter a 10 or 13 digit ISBN number for the title. Do not enter Library of Congress Card numbers (LCCNs) or UPC codes, or any other number other than an ISBN. 13 digit ISBNs start with 978... Omit spaces and hyphens when entering ISBNs.

Books from the McNaughton Book Leasing Service from Brodart may have special McNaughton ISBNs assigned. Those are of little use to catalogers. If the same book lists an alternative ISBN in addition to the McNaughton ISBN, use the alternative.

id Title

Control Bibliographic MARC Holdings Call Number/Item

Shadow title

Rec_Type		Bib_Lvl	m	TypeC
Desc		Entrd	170322	Dat_T
Date2		Ctry		Illus
Repr		Cont		GovtP
Festschr	0	Indx	0	Fiction
Lang	eng	Mod_Rec		Sourc

Label	Tag	Ind.	Contents
ISBN	020		
Standard identifier#	024		
Personal Author	100	1	
Title	245		***REQUIRED FIELD**
Publication info	260		
General Note	500		

3. A UPC code can be added in the 024 Standard Identifier # field for audio and video items.
4. An author name can be entered in the 100 tag. Always enter the names as LASTNAME, FIRSTNAME. In caps, with a comma after the Lastname.
5. A title entry is required in the 245 entry. Replace the ****REQUIRED FIELD**** text with the title. When entering the title, please include the subtitle.

Do NOT include any leading articles (A, AN, THE) as the first word of the title. Using leading articles will cause these records to not file correctly in the Title Browse index.

When appropriate, also enter a physical media description in brackets after the title words. ANSER uses the following:

- [CD] for sound recordings on CD
- [DVD] for video recordings on regular DVD discs
- [BLU RAY] for High Definition DVDs
- [LARGE PRINT] for books in large print
- [CD (UNABRIDGED)] and [CD (ABRIDGED)] for audiobooks, if indicated
- [SOUND RECORDING] for non-CD audio
- [SOUND RECORDING (UNABRIDGED)] and [SOUND RECORDING (ABRIDGED)] for MP3 (PlayAway) audiobooks, if indicated
- [XBOX 360] for Xbox 360 console games
- [PLAYSTATION 3] for PlayStation 3 console games
- [WII] for Wii console games
- [XBOX ONE] for Xbox One console games
- [PLAYSTATION 4] for PlayStation 4 console games
- [WII U] for Wii U console games

EXAMPLES OF 245 TAGS:

BEACH HOUSE [LARGE PRINT]

TOY STORY 3 [BLU RAY]

CITY OF LEGENDS

CAFÉ BLEU [CD]

Note that in the last example, the music album title precedes the group (artist) name.

In the 260 field, enter the name of the publisher and the publication

year. This is almost always found on the title page and/or verso of the title page.

In the 500 General Note field, enter any other information that would help our catalogers: LCCN numbers, series names, pagination, number of parts or discs, etc. For AV items, it would help the RCLS Cataloging staff if you entered performer/director names in the 500 field. For classical music CDs, add the Music Publisher number in the 500 field.

6. Select the Shadow Title check box only if you want to hide the new title from display in the public catalog.
7. Do not change any information in the Control Tab. RCLSHQ will use the default values for "Created by" and Date Cataloged: NEVER to extract reports that our catalogers will use to find a full quality MARC record to overlay your short record.
8. Do not change any information on the MARC Holdings tab.
9. On the Call Number/Item Tab, enter your call number and item information. If you are just adding one copy, click on Save after entering in that item's data.
 - o To add more than one item to same call number, instead of clicking on Save, click on Add Item. Modify the default item information again. Repeat as needed. After entering in all your copies, click on Save.

After entering in all your copies, click one of the following options.

- Save to save the title record and item record(s) to the database
- Add Another Title to add another new title to the database
- Delete to delete the selected call number or items
- Close to exit the wizard without saving changes

6.5 Changing Item IDs

The Change Item ID wizard in the Circulation module is used to replace a missing, damaged, or temporary barcode. This can also be done using the Edit Item wizard or the Call Number and Item Maintenance wizard.

To change an item ID

1. In the Items group of the Circulation module, click the Change Item ID wizard.
2. Search for the item using the Item search helper that automatically opens. The helper will fill in the Item ID box with the ID you select using this helper.

3. On the Change Item ID screen, scan the item ID in the Existing Item ID field (if it was not automatically filled in.)
4. In the New Item ID field, scan the item's new item ID.
5. Click Modify to update the item record.

The following message displays when the item record has been successfully updated. Record Updated

After changing a barcode, you can click one of the following options:

- Change Another Item ID to change another item ID
- Change This Item ID Again to modify the item you just changed
- Close to exit the Change Item ID wizard

6.6 Mark items Missing

There are several different procedures that would change an item record's CURRENT LOCATION field to MISSING:

- Checkout the item to your nnnMISSING special user account (recommended)
- Use the Mark Item Missing wizard in the Items wizard group in Circulation (recommended)
- Use the "Mark Item Missing" option from the right-click glossary option available in several Symphony wizard item displays.
- Checkout the item to the generic, system-wide MISSING special user account (not recommended)
- Change the CURRENT LOCATION field in EDIT ITEM, CALL NUMBER & ITEM MAINTENANCE, or GLOBAL ITEM MAINTENANCE (not recommended).

The first three options are preferable, because if the item reappears, resolving the MISSING is as simple as just discharging it. The Mark Item Missing option available in glossaries should not be used if the item is currently checked out to a real patron.

To mark an item as MISSING using the separate Mark Item Missing wizard,

1. Click the Mark Item Missing wizard in the Items group in Circulation.

2. Search for the item using the Item Search helper. Select the item from the resulting list and click Mark Item Missing. The Item ID box will be filled in with the ID you select using this helper, and item information will show in the header. When not using the Item Search helper, you will be prompted to scan the item ID. Once scanned, item information displays in the header.
3. Click Mark Item Missing.
4. Repeat the previous steps until all missing items are marked.

After the item has been marked as MISSING, select one of the following options:

- Mark Item Missing to mark another item missing
- Close to exit the wizard

6.7 Mark Items Lost

When an item that is checked out to a user is marked as Lost, Symphony does the following:

- Shadows the item in the catalog so that other users will not inquire about the item
- Prevents holds from being placed on the lost item
- Prevents items from being used to satisfy a hold
- Keeps the item on the patron's record until the lost item bill is paid, forgiven, or waived, or item is returned to the library
- Maintains the current location of LOST-CLAIM until the item returns to circulation

Symphony will not allow items that are not checked out to be changed to Lost. To mark an item lost, remember that you can click on the glossary of the user's checkouts in the Checkout wizard and Mark Items Lost. Or, you can open the separate Mark Items Lost wizard from the Items menu in Circulation module.

1. Click the Mark Item Lost wizard.
2. Enter the Item ID or search for the item. Select the item from the resulting list and click Mark Item Lost.
3. Click Mark Item Lost.

If desired, modify the billing information, and select one of the following options.

- Bill User to bill the patron for the lost item and processing fee.
 - Pay Now to pay the lost item bill immediately.
 - Cancel Lost Item Bill to waive the bill for the user. The item will still be marked as lost, but the user will not be billed.
4. Repeat the previous steps for each item until all lost items are marked.

6.8 Delete items, call numbers, titles

The Delete Title, Call Numbers or Items wizard is used to remove a title, call numbers, or items from the catalog. In Circulation this is found in the Items group; in Cataloging it is found in the Titles group.

Note: Items marked as MISSING cannot be deleted until they are discharged.

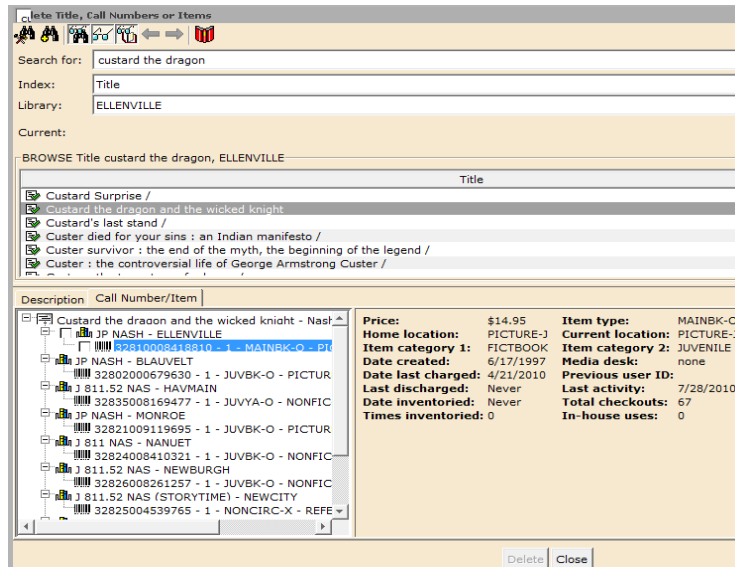
To delete a title (call numbers or items)

1. Click the Delete Title, Call Numbers or Items wizard. The Item Search window appears.
2. Use Item Search to search for the title you want to delete. Note that Item Search has been defaulted to search your library only. If a current record exists for the item, click the Current information link to access the last record displayed, modified, or added.
3. If your search finds results, a list of matching records display in the hit list area. Select the record you want to display. The selected title displays in the View pane on the Call Number/Item tab. If the title has holds, the Holds Tab also displays.

The Call Number/Item Tab displays a hierarchical structure (tree view) of the title and its call numbers and items. You can expand (click the plus sign) or collapse (click the

minus sign) the structure to make it easier to use.

4. To delete the title and its call numbers and items, select the check box next to the title you want to delete. All associated call numbers and items will be selected for removal.



5. To delete the call numbers and associated items, select the check box next to the call number record you want to delete. Note that checkboxes will only be available for your library's call number and item records.
 - If you select the only call number on the title, the title will also be selected for removal, as long as the Delete Title When Deleting Last Call Number or Last Item behavior property is selected.
6. To delete an individual item (and not the title or call number), select the check box next to the item you want to delete.
 - If you select the only item record on the call number, the call number will also be selected for removal.
 - If you select the only item/call on the title record, the title will also be selected for removal, as long as the Delete Title When Deleting Last Call Number or Last Item behavior property is selected.
7. Click Delete, then click Close to exit the wizard. When you select the check box next to the title, call number, or item you want to delete, the title, call number, or item record changes to bold and italic. This convention allows you to easily identify which records will be deleted.

Additionally, when you select a call number or item to delete, the associated title (and call number) check boxes will be automatically selected and the background of the check box will appear in gray. This convention allows you to easily identify the title/call number associated with the record to be deleted.

6.9 Set Items to DISCARD

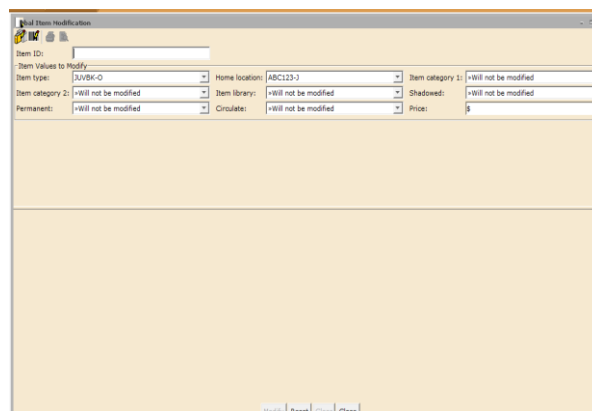
Prior to the Symphony upgrade of 2/20/2014 (release 3.4.1 Service Pack 4), it was not possible to delete items if they had associated bills (old fines). This made the process of deleting items a hit-or-miss proposition. To avoid that problem, we urged libraries to set items to a Current Location of DISCARD by checking the items out to their nnnDISCARD user (where nnn represents the code for each library).

Items set to DISCARD are not seen in the public catalog, but are seen by staff searching in WorkFlows. They are not counted in various Item count reports.

With the ability to delete items with bills, there is no longer any reason to set items to DISCARD, unless a library wants to maintain a separate inventory of items removed from their collection. Some libraries may need to track items that have been removed, for auditing purposes. Separate DISCARD reports could be run for that situation. Libraries that need this capability should consult with ANSER staff to make sure we are aware that the DISCARD-marked items are not deleted by ANSER maintenance routines.

6.10 Global Item Modification

Global Item Modification allows you to change a single field or multiple fields of item records, regardless of whether or not they are linked to the same title or not.



The screenshot shows a web-based interface for "Global Item Modification". At the top, there is a "Item ID:" field. Below it, a section titled "Item Values to Modify" contains several dropdown menus arranged in a grid. The visible values for these dropdowns are: Item type: JUVBK-O; Home location: ABC123-J; Item category 1: +Will not be modified; Item category 2: +Will not be modified; Item library: +Will not be modified; Shadowed: +Will not be modified; Permanent: +Will not be modified; Circulate: +Will not be modified; Price: \$.

Item type:	JUVBK-O	Home location:	ABC123-J	Item category 1:	+Will not be modified
Item category 2:	+Will not be modified	Item library:	+Will not be modified	Shadowed:	+Will not be modified
Permanent:	+Will not be modified	Circulate:	+Will not be modified	Price:	\$

At the bottom of the form, there are buttons for "Modify", "Reset", "Clear", and "Close".

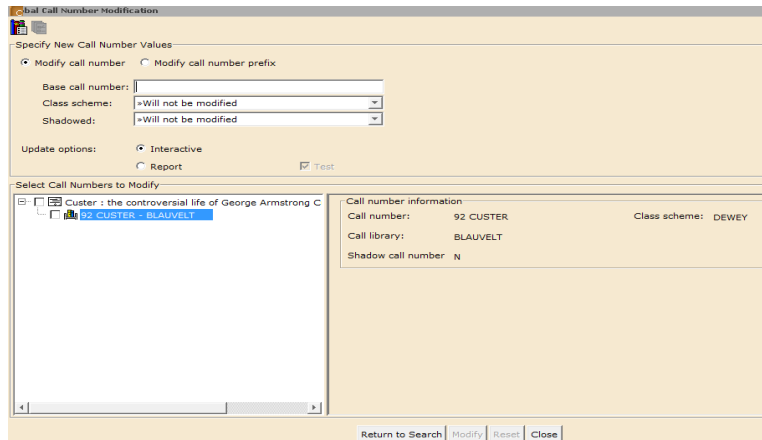
To modify item characteristics globally

1. Click the Global Item Modification wizard.
2. Under Item Values to Modify, make any needed changes to the item value fields by selecting a new policy value from the drop-down list. To reset the item values, click Reset.
3. In the Item ID box, type or scan each item's ID that you want to modify. If you don't know the item ID, use the Modify Selected Items Helper to search for items by title, and then select the items you want to modify.
4. Click Modify.
5. The title, author, call number, copy, and item ID of each modified item display in the list.
6. Click Close to exit the wizard or click Clear to clear the list of previously processed items.

6.11 Global Call Number Modification

The Global Call Number Modification wizard allows you to update one or more call number records for the same title in batch. The same modifications can be made to more than one call number of a title more efficiently using this wizard. To update some or all call numbers of a title.

1. Click the Global Call Number Modification wizard.
2. Use Item Search to search for the title you want to modify. If a Current record exists for the item, click the Current information link to access the last record displayed, modified, or added.
3. If your search finds results, a list of matching records displays in the hit list area. If the View pane is turned on, the selected title will display in the lower portion of the window with two tabs, Description and Call Number/Item. Select the item you want to modify, then click Modify.
4. The Library for Call Numbers to Modify dialog box appears. The only choice will be your library. Click OK.



5. At the top of the Modify Selected Call Numbers window, the Modify Call Number and Modify Call Number Prefix options display. Click only one.
6. If you clicked Modify Call Number, you can elect to modify one or all of the following fields for the selected call number(s).
7. Base Call Number – Modifies the base call number of all selected call numbers. The base call number is defined as the leading characters in the call number up to but not including the analytic which is noted by |z. Type a new base call number. Or, leave this field blank to leave the base call number unchanged.
8. Remember, the prefix is included in the base call number. For example, if you want to change FIC WISER to FIC WISEMAN, you must type "FIC WISEMAN" in the Base Call Number box to retain the FIC prefix in the base call number. To specifically modify just the prefix, use the Modify Call Number Prefix option.
9. Call Number Analytic (not shown if there is no Analytic) – Modifies the call number analytic of all selected call numbers. The analytic part of the call number is defined as all characters following the |z. In this field, you can do the following.

10. Type a new analytic. The new analytic will replace an existing analytic; if no analytic exists, the new one will be added.
11. Leave this field blank to leave the analytic unchanged
12. Select the Delete Call Number Analytic check box to delete the analytic
13. Or, if you clicked Modify Call Number Prefix, the prefix box will display, with three modification options.
14. Note: The call number prefix is defined as all characters preceding the first space in the base call number. For example, in the call number Fic SMITH, the characters Fic will be selected as the prefix.
15. Click one of the following options.
16. Add – The new prefix text is added plus one space to the beginning of the call number. If the base call number contains preceding spaces, these spaces will be retained.
17. Replace – The new prefix text replaces the existing prefix.
18. Delete – The prefix text, all characters preceding the first space, will be deleted from the call number.
19. In the View pane, the Call Number tree for this title displays. Select the check boxes next to the call numbers you want to modify, or select the main title mode and all check boxes are selected. (Check boxes can be cleared by selecting them again.)
20. Under Update Options, click Interactive for these changes to be made in interactive mode
21. Click Modify. If selected in behavior properties to display, a confirmation dialog box will appear. Click Yes to confirm your changes or No to return to the wizard to make more changes.

6.12 Item Group Editor (available to nnnANSER logins only)

Item Group Editor wizard allows a user to select a batch of items based on any field in the item record—including library—but only allows you to effect changes if items are found that belong to your library.

For example, you may have a list of books that you need to move from circulation. The Item Group Editor lets you change the Circulate property for each item in the list at the same time. You can save the list of items so you can quickly call up that group and make any changes without the need to search the items again. You

can make modifications to a saved group of items or to an unsaved item list. You can also save the original settings for each item in the group so you can restore those settings at a later time. Too many changes made via Item Group Editor can cause our nightly cleanup processes to not complete properly. **To avoid causing a system-wide problem, daily Item Group Editor changes must be limited to 1,000 items or less.**

Because Item Group Editor offers many options for making changes, saving those changes in groups, and then retrieving those groups and re-setting the changes, it requires in-depth training. Please consult with RCLS ANSER staff before using Item Group Editor.

6.13 Transfers

The Transfers wizard is used to perform the following functions.

- Transfer an item from one call number record to another call number record within the same title record
- Transfer a call number and all of its associated items to a different existing title record
- Transfer all call numbers/items from one existing catalog record to a different existing catalog record. Only RCLSHQ can transfer all items; member libraries can only transfer their own items.

You can find the Transfers Wizard under Cataloging, Special.

Search for your item.

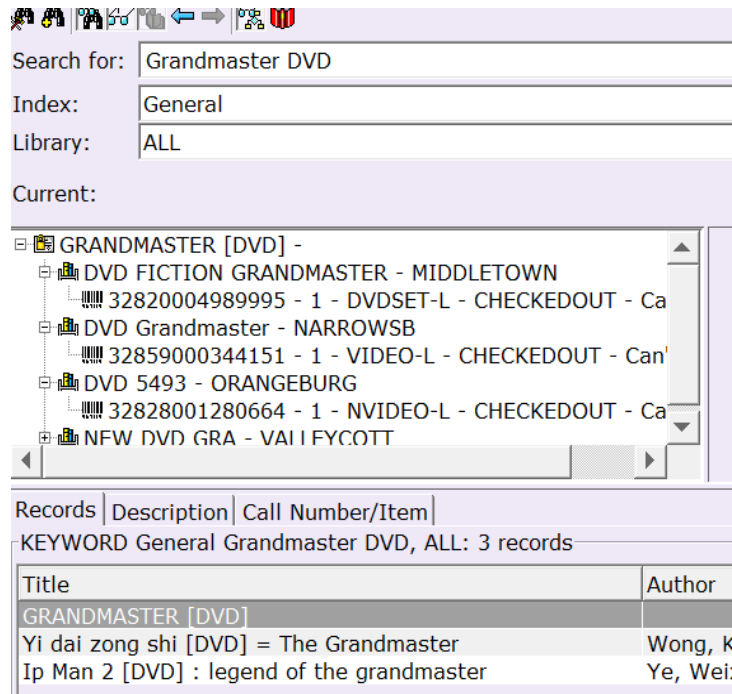
The screenshot shows a search interface with the following fields and results:

Search for: Grandmaster DVD
 Index: General
 Library: ALL
 Current:

Title	Author	Publisher
GRANDMASTER [DVD]		ANCHOR BAY
Yi dai zong shi [DVD] = The Grandmaster	Wong, Kar-wai, 1958-	[Xianggang] : Mei ya yu le [distributor], [2013]
Ip Man 2 [DVD] : legend of the grandmaster	Ye, Weixin.	Richardson, TX : Well Go USA, 2011.

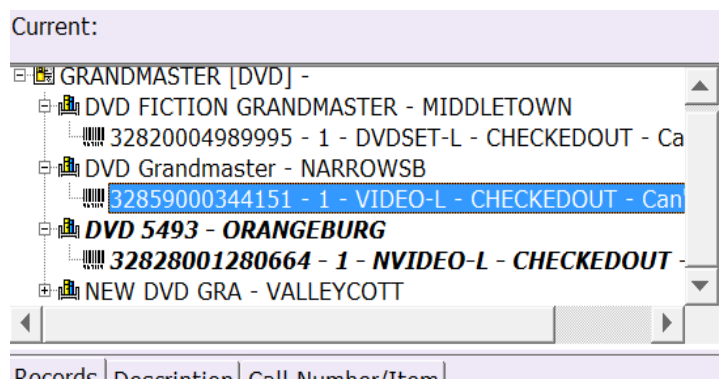
In the bottom pane:

Select the title you want to transfer your call number/item from. Click the box 'Add to Tree'.



In the middle pane:

Expand the title by clicking the + sign and then select your library's call number. Click the box 'Retain for Transfer'. Your call number and item are now bolded and italicized.

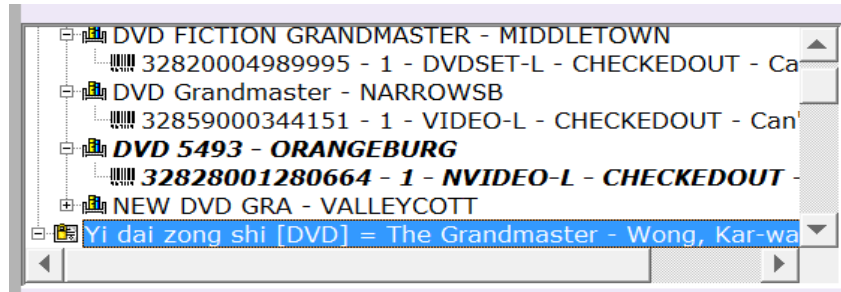


In the bottom pane:

Select the title you want to transfer your call number/item to. Click the box 'Add to Tree'.

In the middle pane:

Select the title you want to transfer your call number/item to. Click the box 'Transfer'.



A Transfer results dialog box opens to let you know the results of the transfer. You cannot transfer an item if it is In Transit or if it is the only item attached to the Title.

6.14 Item linking for Union List of Serials

The Union List of Serials as it exists in Symphony is only of value for periodicals titles that aren't available in full text in our online databases: it lets you see who subscribes to print editions and how long they keep their back issues.

The item records should be constructed as follows:

Call number: [Your Dewey number and cutter]|z[serial volume statement] Home Location: PERIOD-A Item Type: PERIOD-X

The serial volume statements would be:

CURRENT 6 MOS

CURRENT 12 MOS (example June 2012-present)

CURRENT YR (example Jan 2013-present)

CY+1 (example Jan 2013-present plus all of 2012)

CY+2

etc.

You would only link these items to a title record that has the [ULS -- DO NOT LINK] designation.

For a barcode number, do NOT use one of your regular barcodes. Invent one. Our standby method is to use your library three letter code followed by the date/time/year. Example: MTC082710342013.