

# Mass Change Collection Records and Holdings Using Tagging & Mass Update

## What is tagging and why use it?

Tagging within the library program is probably one of its strongest features, use tagging when there are many Book or other collection item records that require modification for the <u>same purpose</u> of changing specific information contained within its <u>Record or Holdings</u>.

Once records are tagged within a collection the user can select the "Mass Update" feature from within the Catalog Management/Catalog Menu.

Options of change using "Mass Update of <u>Tagged</u> Records" are:

- Change a Circulation Code
  - Global Change a Circulation Code "From To" (example; 0 to 03 to set as a Reference Item having no circulation)
- Change a Call Number Prefix
  - Global Change a Call Number Prefix "From To" (example; F to FIC to create consistent Call Number Prefix's)
- Reformat Field Data
  - Global change Call Number 852h to all Uppercase Letters
- Add a Tag with Content Description
  - Global insert of a Tag & Subfield plus content description (example; 655a Westerns)
- Insert Funding, Location or Owner Codes
  - o This option allows for the replacement or addition of these codes to tagged records.
- Remove a Tag
  - This option allows for the removal of MARC Tag & Subfield from any tagged records.
- Delete an Entire Record
  - This option allows for the complete removal of tagged MARC records and Holdings from the collection.
- Change Copy Status
  - This option allows for the complete removal of a current Status code and replacing the tagged MARC Record <u>Holding</u> with a New Status Code (example; M to L).
- Change Field Contents
  - This option allows for the complete substitution by specifying a Tag & Subfield and a specific current description and replacing that description to the newly entered description to the tagged MARC Record (example; 650a – England to Great Britain).
- Change a Tag
  - This option allows for the complete substitution by specifying a Tag & Subfield to change to a "New" Tag & Subfield within the tagged MARC Record (example; 650a to 655a).



### General Steps using a Circulation Code change example:

Note: When using one of the other options - the method for making those changes is similar and easily accomplished. Always check your work before processing any Mass Global Change. If there is an Error in the processing reverse your steps using the Tagged Records. Never remove the Tags placed on your records until all work has been verified to be correct.

1. Begin at the Main or BackOffice Menu



2. Next Tag the records that require modification, click on Search/Edit Catalog



3. Locate all of the Items that are to be changed and **Page Tag them** 

🕇 G3 (Bu	d 2.5.313) : DEMO (User: admin ) (Server: Iion ) - [Search Catalog]		
Action C	Iteret Enrichment Help Previous Menu Main Menu		
- Catal	in Saarch		
Colle	Show Tagged technic in MAIN COLLECTION Driv		
FING	or CALLNO Y Starts with Y r		
So	18/ CALLNO  CAUthorithy Search Print Expand Rows for Image Views		
	New Fire Blacoder 300180000222		
2010	S In 1 Contenectors in results of 1. Displaying page 1 of 4 Union Search:		
Show	Show last 5 items extend in M4IN COLLECTION Refresh Search		
		D 024 02 CH	10000 DEEEDEW
768	Comments and an included, 2001 (Copies: Analistic 1) (33 Library Systems) (MAIN COLLECTION)	1001.02.001	D
2007	The world's best thin books :what to read when your book report is due tomorrow /	REF 028.16 BO	) REFERENC
129/1	Bodart, Joni Richards. (Copies:1 Available1) (03 Library Systems) (MAIN COLLECTION)	5	U <u>C</u>
P 925	Doting Indentity Hilders's Mustahid encyclopedia. (Copies: Analidaeting Joid Large Springer Joid Large Spr	REF 031 DOR	D
932	Expertended.	REF 031 EEN	
	Chalade children environda	REF 031 SCH	REFERENC
186	(Copies: Hwalable 1) (3) Urray Systems) MAIN COLLECTION) 109 ONLY the records that are not to be Circulated		D
A 267	Value (difformat) (Concert benefable 1/03) Representation MARCOLLECTIONS so these can have their Circ Code altered to	REF 031 VIS	REFERENC
	Colorest researces (in the colorest researce) (i	DEE 034 02 DIA	
185	Duringer work of the state of t		
994	Outiness workit records, 2027 ( Codenies Availabert 1) (G) Laran Stetemini MAIN COLLECTION)	REF 031.02 GU	REFERENC
	The world almanac fir kids, 2007 /	REF 031.02 WC	R PEFERENC
1297	(Copies:1 Available:1) (03 Litrary Systems) (MAIN COLLECTION)	2	<b>D</b> E
312	The World administ and book of fracts, 1991 / Cooless F. Availability 11 (02 Large Settems MMN COLLECTION)	REF 051	REFERENC
	The Wold almana: and book of facts. 1997 /	REF 051	REFERENC
312	(Copies:1 Available 1) (03 Library Systems) (MAIN COLLECTION)		D
_			

#### 4. Next Tag Records

9948	Guinness world records, 2007 / / Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTION)	
12971	The world almanac for kids, 2007 / ( Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTION)	<ul> <li>Tagging a record is accomplished by</li> </ul>
3125	The World almanac and book of facts, 1991 / ( Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTION)	number columnn and then double
3126	The World almanac and book of facts, 1991 / ( Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTION)	clicking the left mouse button.
	Power of the news modia	

#### 5. Results, Green Stick Pin will appear.





6. When All Records have been Tagged, verify the count of tagged records (write the count). Set the proper Collection, Click the "Show Tagged records, Click the Search button.

Collection	Print Expand Rows for Image Views
Guinness world records, 2007 /           7681         (Copies: 1 Available:1) (G3 Library Systems) (MAIN COLLECTION)           9253         Copies:1 Available:1) (G3 Library Systems) (MAIN COLLECTION)	
9320 Encyclopedia. (Copies: 1 Available: 1) (03 Library Systems) (MAIN COLLECTION)	Once all records have been tagged; create a Search by setting the Show
9948 (Collect Available:1) (G3 Library Systems) (MAIN COLLECTION) 1050 Scholastic book of lists /	Togged Records to verify the count
Buckley, James, (Copies: 1 Available: 1) (G3 Library Systems) (MAIN COLLECTION)           Scholastic children's encyclopedia.           1860         (Copies: 1 Available: 1) (G3 Library Systems) (MAIN COLLECTION)	the following process. Should these
2672 Visual dictionary. (Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTION)	counts not match re-check your work before processing any changes.
12979         The world's best thin books :what to read when your book report is due tomorrow / Bodart, Joni Richards. (Copies:1 Available:1) (G3 Library Systems) (MAIN COLLECTION)           4402         Destefano, Lauren. (Copies:1 Available:1) (G3 Library Systems) (MAIN COLLECTION)	

7. Next step is to change menus select "Previous Menu" and choose the "Mass Update" menu.



8. Select "Change Circulation Code" from the drop down menu.





9. Setup all fields, pick the Collection where the Tagged Records reside, Change Circulation Code select the Code to change within the "FROM" drop down menu and select the Code to replace the former Code from the "TO" drop down menu. (example select Code 03 for "No Circulation" making any Item with this code a Reference Item)



Zero (0) is the Default code for Regular Circulation and most library customers use this as their Default Code, if you have altered this code then you must make proper adjustments by selecting the proper code to change.

03 is also a Default code for Reference Books (example – Dictionaries, Encyclopedias', Law books, etc.) that cannot be circulated from the Library. Other codes exist within the Circulation Codes table, codes can be changed, and deleted or new custom codes can be added. The use of any code must be related to a Borrower Group within the "Circulation menu – <u>Define Circulation Periods and Limits</u>", here you can create the restrictions for any use of a code.

- G (Build 2.5.313) : DEMD (User: admin ) (Server: lion ) [Collection Mass Update]

   File Process Help Previous Menu Main Menu

   Main Collection Code

   Main Collection

   Select the Process/Stort menu item to stort
   this process

   Change Circulation Code:

   FROM -> 0

   TO -> 03 Reference only No regular Circulation

   Status

   4 Page
- 10. Recheck your settings and select "Process" and "Start"

Library Resource Management Systems, Inc. support@lrms.com



#### 11. The Library program will

Confirm		×
2	This action will affect ov	er 9 records.
~	Are you sure you wish b	o continue?
	Yes No	
_		

G3 will verify the nunber of Items that will be changed, know the tagged item Count before starting this process.

To proceed click the "Yes" button, when completed a Message box will appear, click "OK"

Status		
Completed Update		Depending upon the
	Message 🔀	number of Tagged items,
	Completed Update!	this process is usually
	ОК	very fast. Click OK to
		complete the process.

12. Check the results of this Process by returning to the Catalog Management – Search/Edit Catalog. Search the Collection by Show Tagged Records, Highlight any record, select the "Action" menu and select "View Holdings". Review the Circ Code field to verify the code change.

G3 (Build 2.5.313) : DEMO (User: admin ) (Server: lion ) - [Search Catalog]					
Action Content Enrichment Help Previous Menu Main Menu					
Catalog Search				_	
Collection: MAIN COLLECTION					
Find for TITLE SEARCH    Starts with					
Next Free Broade: 300180002232					
🥦 🅐 ≤ 📴 👔 🔽 Total records in result set is 9. Display	3arcode 21600	Status	Borrower ID	Due Date	Owner Code
Show Content Enrichment Show last 5 items entered in MAIN C	21000	0004 / / /			-
7681 (Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTIO	•				•
Dorling Kindersley children's illustrated encyclopedia.		~ 1			
Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTIO	Aaa	Unange	<u>Delete</u> <u>Mov</u>	Print D	/mo Barcode(s)
9320 (Copies:1 Available:1 ) (G3 Library Systems) (MAIN COLLECTIO		uto Number Bore	odo?		
Guinness world records, 2007 / 9948 (Conjest 1 Available:1 ) (63 Library Systems) (MAIN COLLECTIO 1000 -	Barcode: 216	000664	Serial #		Save
Scholastic book of lists /					
Part 1859 Buckley, James, (Copies:1 Available:1) (G3 Library Systems) (M.	Acq Date: 11/	14/2009 Cost: 12	2.35	Issue:	<u>Cancer</u>
Scholastic children's encyclopedia. (Copies:1 Available:1) (G3 Library Systems) (MAIN COLLECTIO	Circ Code: 🔟	Loc	Code: G3 🔽	Vendor Code: MAC	<u>M</u> ulti Add
Page 72 Visual dictionary. (Copies:1 Available:1) (G3 Library Systems) (MAIN COLLECTIO		Owr	ner Code: LRMS 🔽	Copy Status: 🔺	
The world's best thin books (what to read when your book report	Fund Code:	СВ			<b>~</b>
Wither /	Copy Status	Legend:	This Circ	Code chonce	is within
DeStefano, Lauren. (Copies:1 Available:1) (G3 Library Systems)	O=Out ; P=Paid	d ; VV=VVithdrawn; T=1	Fransferred		of the
		-	ule no	bioings area a	
	On Loan From:		16	ogged Hecord	5
	inculation History		Print Item Hist	tory	
n i i i i i i i i i i i i i i i i i i i	Date	Action	Borrower ID E	Borrower Name	
I					

5 | Page

Library Resource Management Systems, Inc. support@lrms.com