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## 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 same purpose of changing specific information contained within its **Record or Holdings**.

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 Tagged 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
  - 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 Holding 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



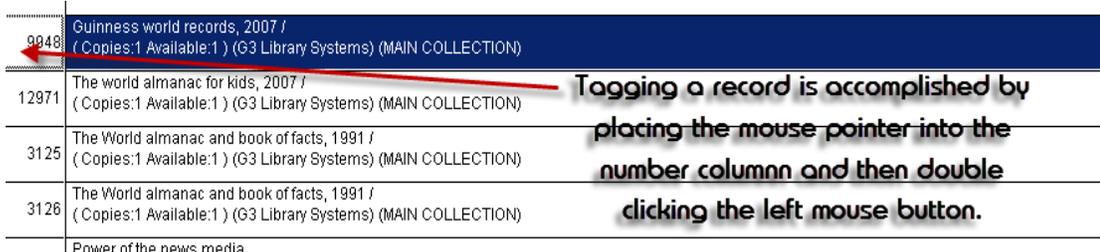
2. Next Tag the records that require modification, click on Search/Edit Catalog



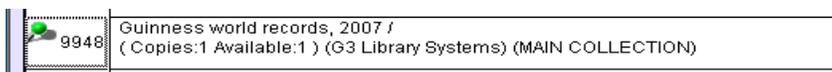
3. Locate all of the Items that are to be changed and Tag them



4. Next Tag Records



5. Results, Green Stick Pin will appear.



- 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.

Once all records have been tagged; create a Search by setting the **Show Tagged Records** to verify the count as G3 will display this count during the following process. Should these counts not match re-check your work before processing any changes.

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

Select the Mass Update menu item.

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

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)

I want to

Tagged Only

Change Circulation Code:  
FROM ->  TO ->

**FROM = 0 TO = 03 or some other code based upon need.**

Status

**This Option is used only for Tagged Records.**  
Setup this screen as shown if the Goal is to change Collection Items having the 0 Circulation Code to a code that restricts circulation to fewer days or no circulation

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 – [Define Circulation Periods and Limits](#)", here you can create the restrictions for any use of a code.

10. Recheck your settings and select "Process" and "Start"

I want to

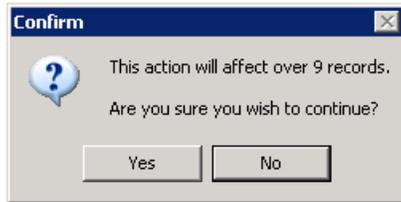
Tagged Only

Change Circulation Code:  
FROM ->  TO ->

**Select the Process/Start menu item to start this process**

Status

11. The Library program will



**G3 will verify the number 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 number of Tagged items, this process is usually 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.

**This Circ Code change is within the Holdings area of the Tagged Records**