

How to Use the Item Group Editor to Search for Items Assigned Cataloging Codes No Longer in Your WorkFlows Menu

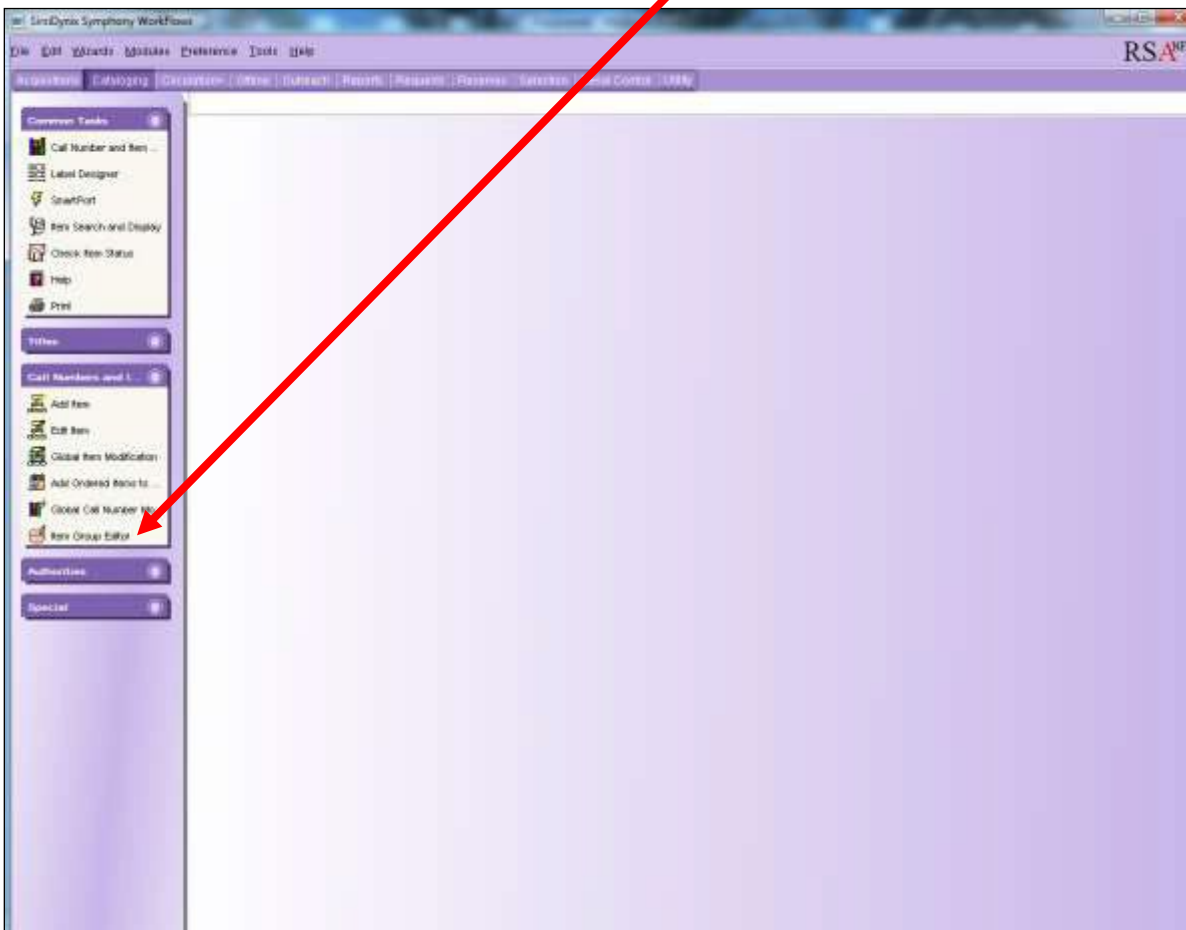
Created February 25, 2014

This cheat sheet is also posted online. Go to <http://alsrsa.org/client/search/asset/4042>

If your library's WorkFlows drop-down menus for item type, home location, or item category 1-5 codes have been customized to only include those codes your library assigns to its collection, only the codes from your customized menu(s) will appear in the gadget selection boxes in the item group editor. Items in your collection may still be assigned codes that formerly appeared in a WorkFlows drop-down menu, even though those codes have since been removed from the menu.

For assistance identifying cataloging codes still assigned to items in your collection, but no longer in your WorkFlows drop-down menus, please contact Erica Laughlin, the RSA Cataloging and Database Administrator, at rsahelp@railslibraries.info or 1-866-940-4083.

1. Open WorkFlows in TECH mode.
2. Go to the Cataloging module.
3. Open the Call Numbers and Items toolbar on the left.
4. Put your cursor over the Item Group Editor wizard and *left* click.



5. An override pop-up box will appear:

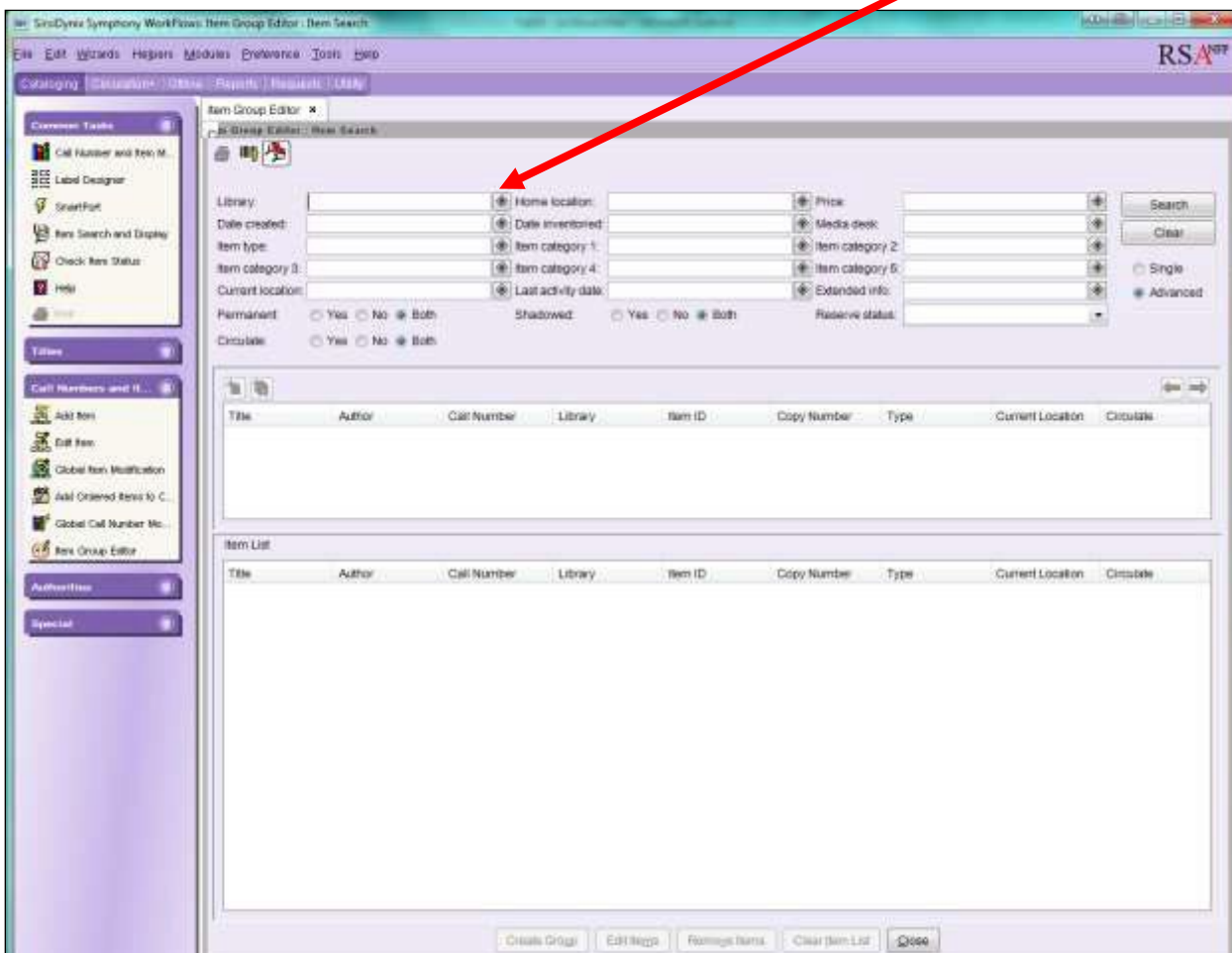


Enter the override password provided to you during item group editor training. Click OK.

If you do not remember the override password, please contact Erica Laughlin, the RSA Cataloging and Database Administrator, at rsahelp@railslibraries.info or 1-866-940-4083.

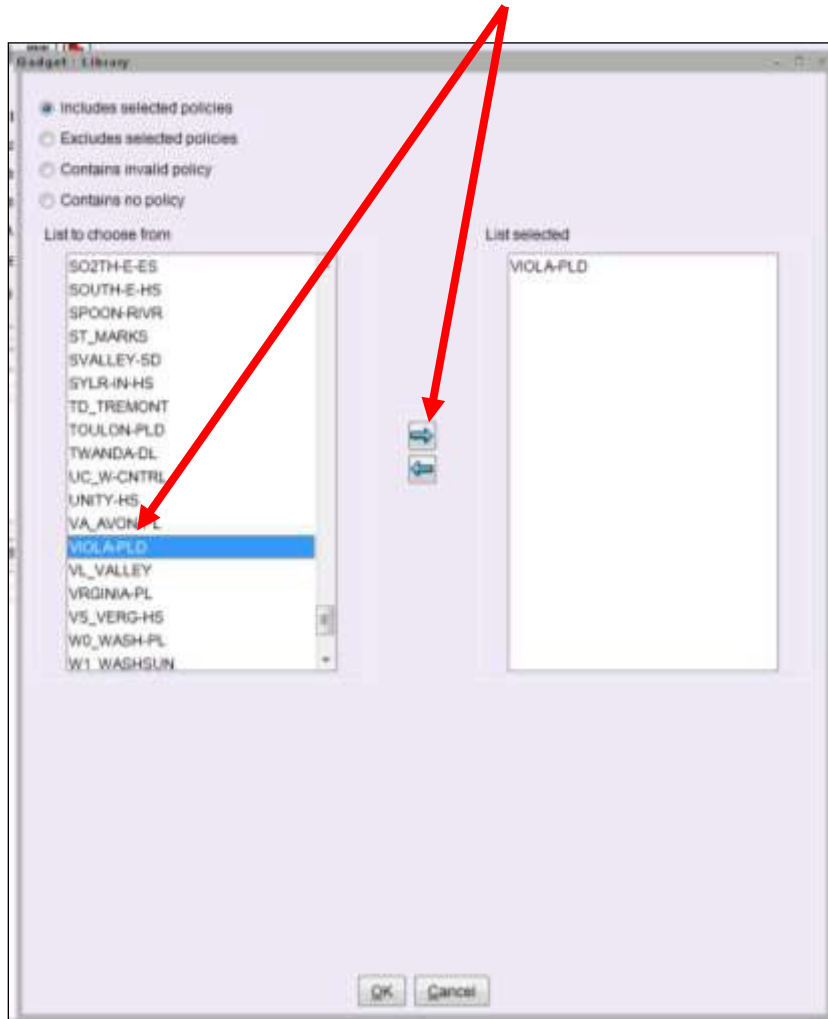
Important: Please do not share the override password with staff members—either at your library or at other RSA libraries—if they have not completed item group editor training.

6. The advanced search screen opens. Click the gadget button next to the library field:



- From the gadget selection box, click on your library in the list on the left. Click the arrow to move it to the list selected on the right.

In the example below, the Viola Public Library is selected. Please select your library from the list on the left.



- Once you click OK, the gadget selection box will close. The name of your library should appear in the library search field.

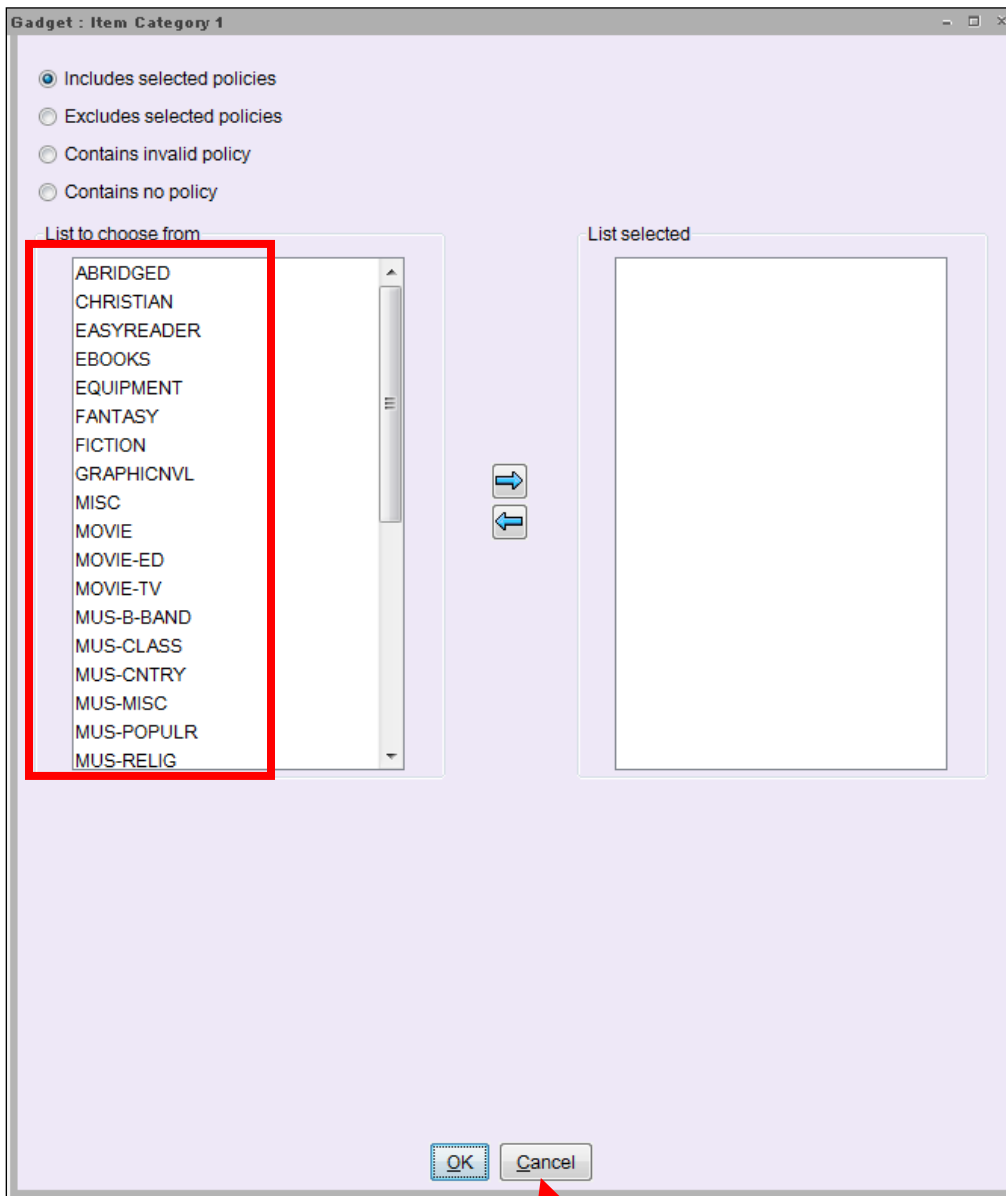
Viola Public Library appears in the example below:



- Click the gadget button next to the field by which you want to search (home location, item type, or item category 1, 2, 3, 4, or 5).

Once the gadget selection box opens, check to see if the value you want to use in your search still appears in the list. If the value is not in the list, it has been removed from your WorkFlows drop-down menu.

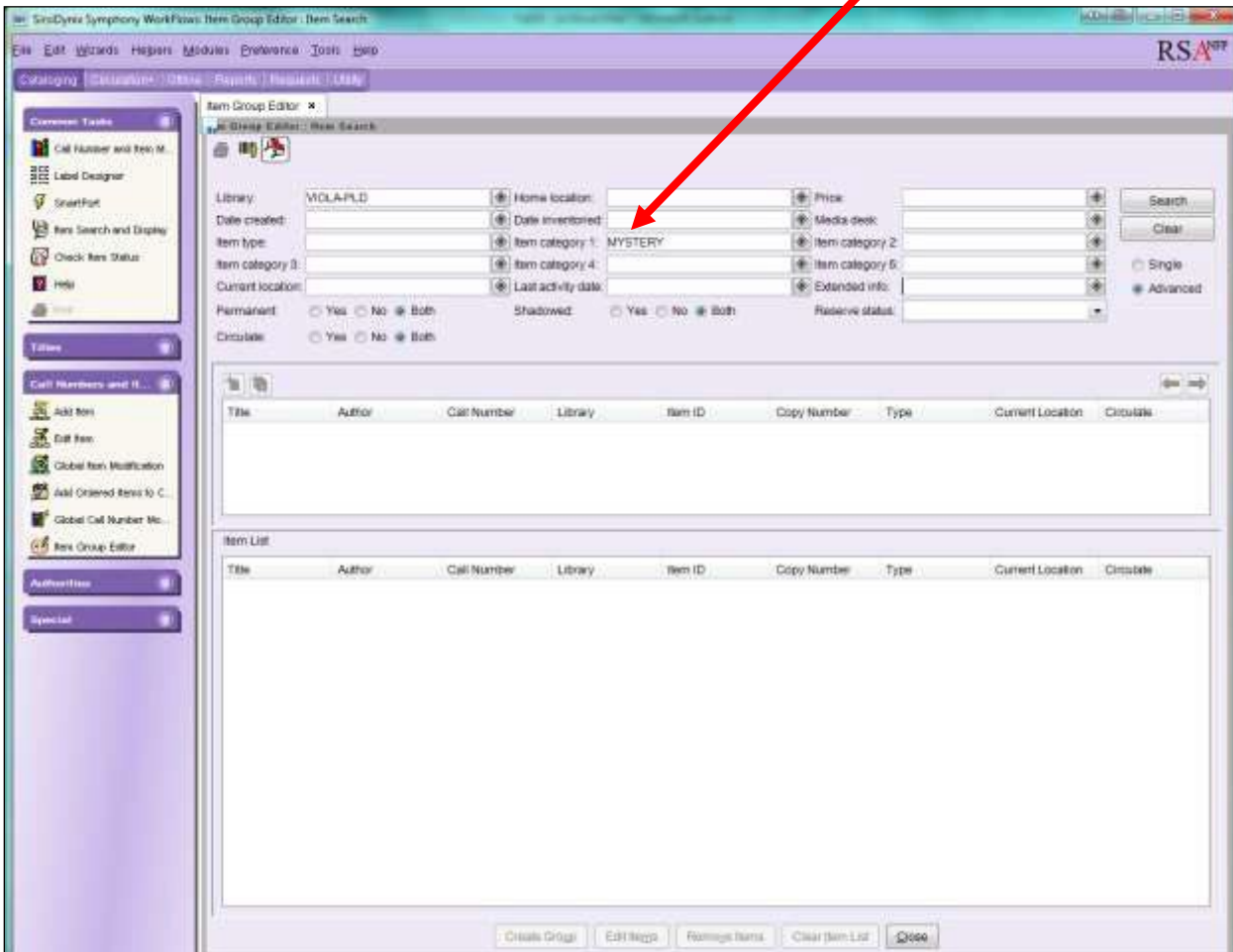
In the example below, the MYSTERY item category 1 code does not appear in the gadget selection box. Codes appear in alphabetical order in each gadget selection box. Since the code does not appear in the gadget selection box, it no longer appears in the library's item category 1 menu.



- Since the code is unavailable for you to select, click cancel to close the gadget selection box.

11. Turn your <Caps Lock> key on. In the blank field to the right of the code you want to search by, type the code in upper case.

In the example below, MYSTERY is typed into the item category 1 field in upper case.



You must type the code in uppercase.

If you type the code in lower case and click search, you will see this error:



12. After you type the code in upper case into the search field, a list of items in your collection that are still assigned that code will display in the result list. The item group editor is able to retrieve the items even though the code no longer appears in your WorkFlows drop-down menu.

A list of items assigned the MYSTERY item cat 1 code in Viola Public Library's collection is shown in the example below:

Item Group Editor: Item Search

Library: VIOLA-PLD Home location: Price: Search
 Date created: Date inventoried: Media desk: Clear
 Item type: Item category 1: MYSTERY Item category 2:
 Item category 3: Item category 4: Item category 5:
 Current location: Last activity date: Extended info:
 Permanent: Yes No Both Shadowed: Yes No Both Reserve status:
 Circulate: Yes No Both

Result List: 265 records, displaying 1-265

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Confessions the	Patterson, James...	YA PAT BK2	VIOLA-PLD	A13303134796	1	BOOK-NEW	CHECKEDOUT	N
Deadline / Sandra	Brown, Sandra. 1.	F BRO LP.	VIOLA-PLD	A13303109860	1	BOOK-NEW-L	CHECKEDOUT	N
Rules of murder /	Deering, Julianna	F DEE	VIOLA-PLD	A13303248550	1	BOOK-NEW	NEW-BOOK	Y
Robert B. Parker's	Atkins, Ace	F PAR LP	VIOLA-PLD	A13303243714	1	BOOK-NEW-L	NEW-LP	Y
Dolled up to die : ...	McCourtney, Lore...	F MCC BK2	VIOLA-PLD	A13303246738	1	BOOK-NEW	NEW-BOOK	Y
Cross my heart / J.	Patterson, James...	F PAT	VIOLA-PLD	A13303248065	1	BOOK-NEW	CHECKEDOUT	N
The gods of null	Connolly, Michael	F CON	VIOLA-PLD	A13303220733	1	BOOK-NEW	CHECKEDOUT	N

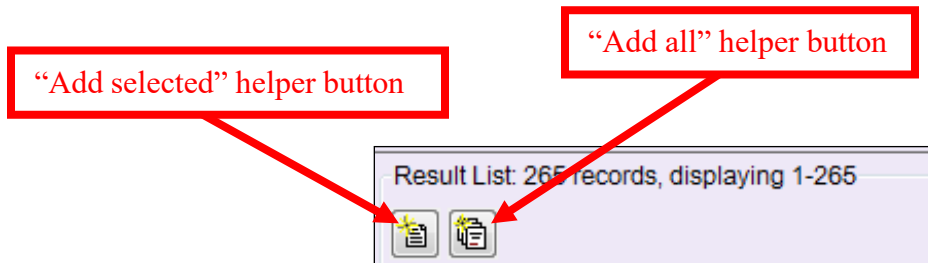
Item List:

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
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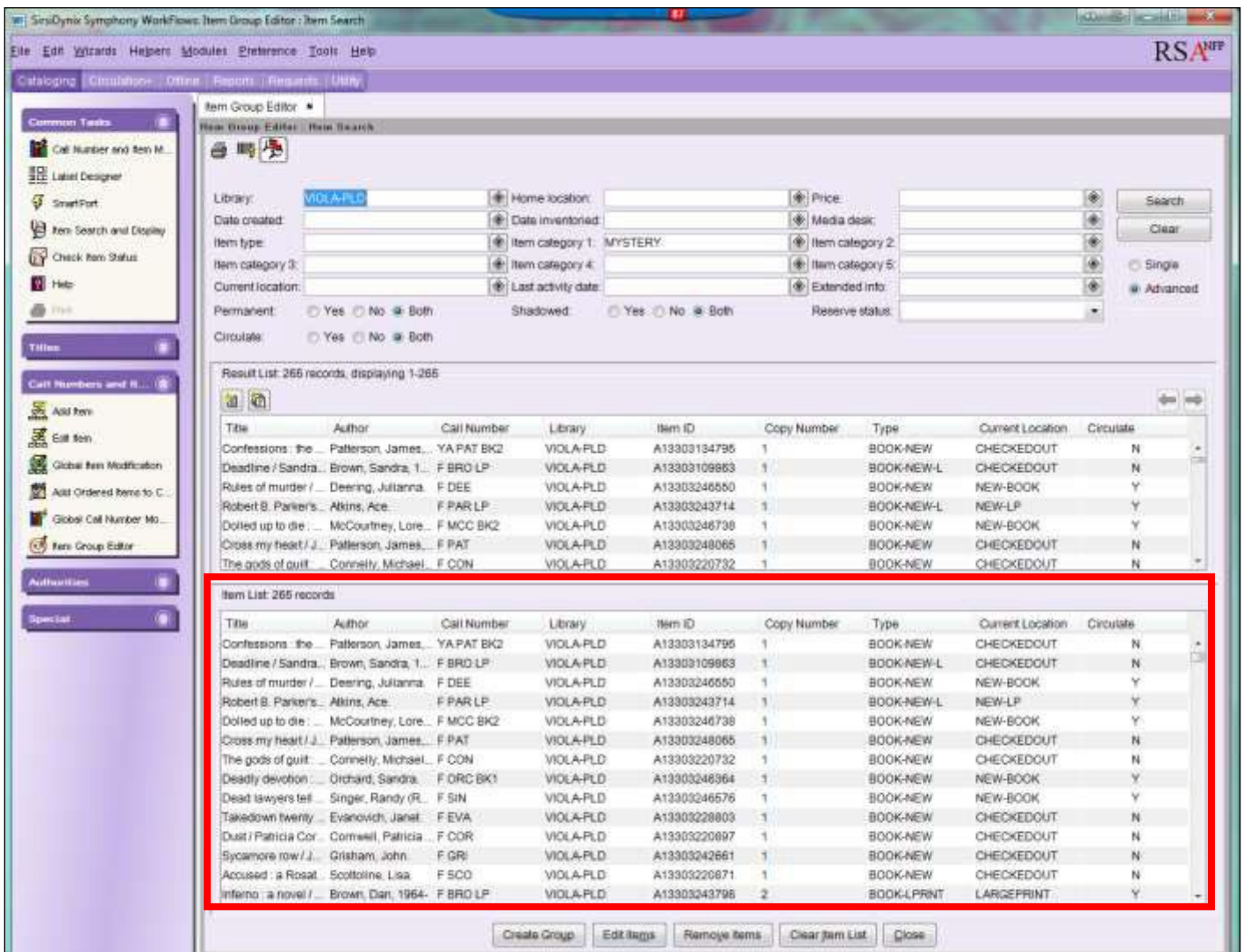
Create Group Edit Tags Remove Items Clear Item List Close

13. From the result list, identify those items you want to edit. Use the "Add all" or "Add selected" helper buttons to move the items to the item list at the bottom of the screen.

The number of items in your result list will vary from that shown below:



In the example below, the "Add all" helper was clicked, which moved all results to the item list.



14. Create a group of the items or edit them. See the following sections of the WorkFlows item group editor instructions, posted at <http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/2701>:

- Editing an Unsaved Item List, beginning on page 64.
- Saving an Item List as a Group, beginning on page 78.