Instructions for the
WorkFlows Item Group Editor Wizard

This guide is available online at http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/2701

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Overview of the WorkFlows Item Group Editor Wizard

The item group editor wizard is one of the enhancements from the RSA upgrade to WorkFlows 3.4.1 in February 2012. All Basic and Full Online RSA members may use the item group editor wizard. **Since the item group editor is a very powerful wizard, RSA requires library staff to complete training before beginning to use the item group editor**—even if staff are only searching for, but not modifying, items in the library's collection. **All library staff who plan to use the item group editor must be subscribed to and regularly monitor the RSA listserv.** The RSA listserv will be the communication mechanism for RSA staff to convey important information about the item group editor wizard, such as indexing issues or if RSA offers "bulk quantity edit days" when larger numbers of items may be modified per day.

The purpose of the item group editor wizard is to allow you to search for a group of items in your collection and then make changes to all of those items in a single batch. **Each Basic and Full Online library can use the item group editor to modify up to 5,000 items per day. Please note this limit applies per library – not per staff member at your library who uses the item group editor.** It is very important you carefully track the number of items you edit in the item group editor. RSA staff cannot track edits for you. Exceeding the 5,000 item per day modification limit may cause indexing trouble overnight and WorkFlows performance issues the following day.

Examples of values that can be changed using the item group editor include:
- Home location
- Price
- Item type
- Item category 1
- Item category 2
- Item category 3
- Item category 4
- Item category 5
- Number of pieces
- Extended information notes (public, circ, and staff notes)
- Statuses for permanent, circulate, and shadowed

The item group editor advanced search interface allows you to search your collection using values that cannot be used to search for items in other WorkFlows wizards (home location, item categories 1-5, created date, last activity date, current location, etc.). Searching for items in your collection via the item group editor is also more convenient than running a report of your collection in Web Reporter or Director's Station. The item group editor is particularly helpful in identifying inconsistencies in how your collection is cataloged.

The item group editor wizard has the option to save a list of items to make it easy to restore the original values of those items. For example, fiction books shelved on a display, which are no longer on that display, could be edited back to their original home location code of FICTION using a list saved in the item group editor wizard.

RSA staff may periodically schedule days for select RSA libraries to perform edits to their collections that involve larger numbers of items than the 5,000 items-modified-per-day limit that is usually in effect. If implemented, these "bulk quantity edit days" will allow your library to change larger numbers of items more efficiently in the item group editor wizard. If you would like RSA to consider scheduling a "bulk quantity edit day" for a special project involving your collection, please contact James Campbell, the RSA System Supervisor, at rsahelp@railslibraries.info or 1-866-940-4083. Should RSA staff decide to schedule "bulk quantity edit days," please watch the RSA listserv for more information.

Batch editing requests for significant numbers of items should continue to be submitted to James at rsahelp@railslibraries.info or 1-866-940-4083. James will use the SirsiDynix Symphony Application Programming Interface (API) to perform the batch editing of those items more quickly and efficiently than could be accomplished using the WorkFlows item group editor wizard.

Batch editing requests for library users and call numbers should also be submitted to James, as the WorkFlows item group editor wizard only has the capability to modify items—not users or call numbers. For more information about API, please see the RSA API web page at http://tinyurl.com/c59bdgr.

Before You Begin Using the Item Group Editor Wizard

If you have not done so already, work with colleagues at your library to determine batch edits that are needed in your collection.

Examples of batch edits:

- Do your mystery novels need to be assigned the MYSTERY item category 1 code, rather than NONFICTION, to help the Director track how mysteries are circulating?

- Did your library use item category 1 codes, such as MYSTERY or ROMANCE, which are now assigned to item categories 4 or 5?

- Does your library have quite a few books or DVDs assigned a "new" item type code (e.g., BOOK-NEW or DVD-NEW) that are no longer new and need to be assigned the item type your library uses for its non-new materials?

- Has your library assigned the item category 2 code "undefined" to many of its materials, and those codes need to be changed to the appropriate reading level (adult, young adult, or juvenile)?

To see how your collection is currently cataloged, you can take a look at the home location, item type, and item cat reports that are posted on the RSA Monthly Statistics page at http://alsi.sdp.sirsi.net/client/RSAwebsite/?rm=MONTHLY+STATIS0|||1|||0|||true. These reports are updated monthly.

You can also use Web Reporter to generate reports of how your collection is cataloged. The reports will help you identify potential edits that are needed. If you have questions about how to run a certain report, or if you would like RSA to run a report for you, please contact the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083.

Please note if you would like any reports of your library's progress assigning item categories 3, 4, or 5 to its collection, RSA staff must run those reports for you in WorkFlows. Reports for item categories 3, 4, and 5 are unavailable in Web Reporter.

RSA staff can also provide you with a shelf list of your entire collection, or a section of it, sorted in call number order. The shelf list is helpful for a bird's eye view of how different sections of your collection have been cataloged.

Checking Your WorkFlows Version Number

The item group editor wizard should only be accessed in the most recent version of WorkFlows -- version 3.5.1.0.1216. Please check your WorkFlows version number to ensure your WorkFlows software is up-to-date. You will only need to check your WorkFlows version number once. However, if you will use the item group editor wizard on another computer that has WorkFlows installed on it, you will need to repeat these steps to verify that WorkFlows 3.5.1.0.1216 is installed on that computer.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
2. Go to the Help menu at the top.
3. Click on the "About…" option.
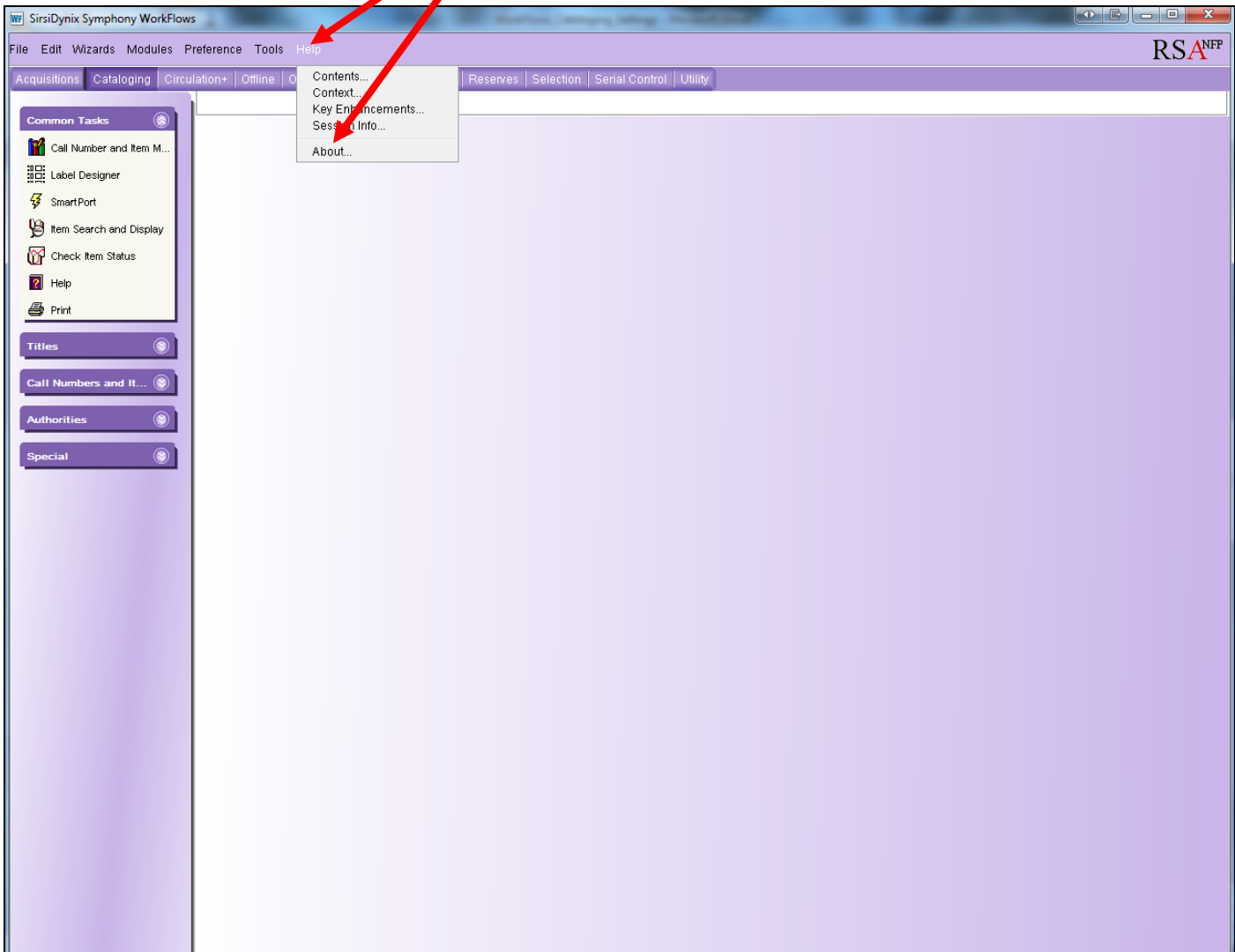
A pop-up box will open:
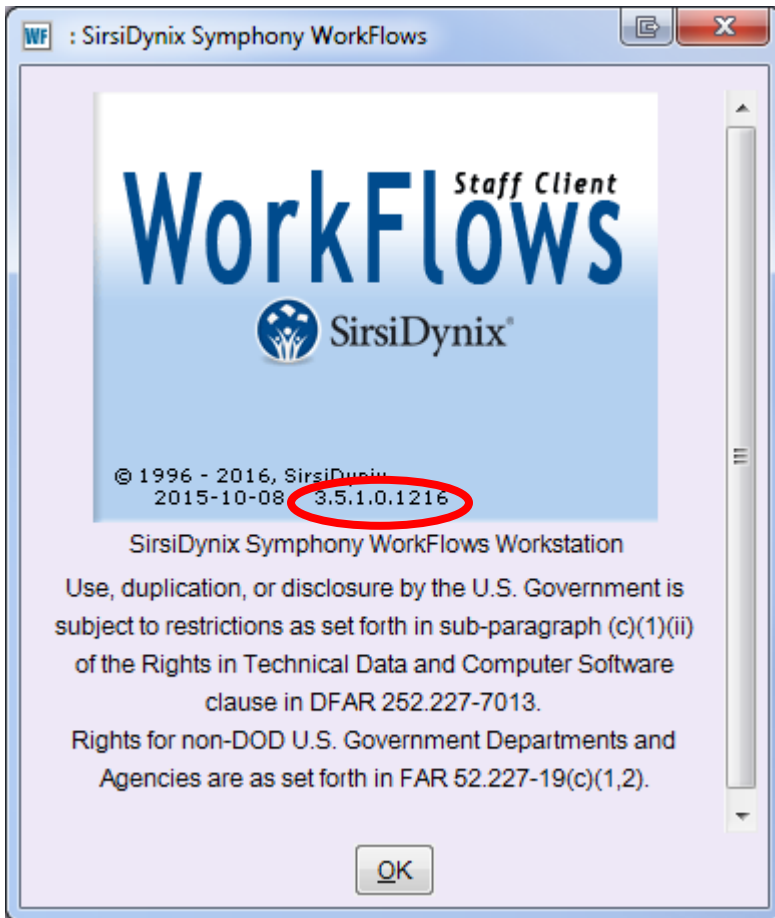
4. In the pop-up box, under the SirsiDynix WorkFlows logo, look for the following series of numbers (circled above): 3.5.1.0.1216

5. If version number 3.5.1.0.1216 appears in the pop-up box, your WorkFlows software is up-to-date. You will be able to access the item group editor wizard.

    If a version number *other than* 3.5.1.0.1216 appears in the pop-up box, you must update your WorkFlows. Until you update your WorkFlows software, you will not be able to access the item group editor wizard.

    The WorkFlows installation files for the most recent version of the software are posted on the RSA Downloads page at http://tinyurl.com/csjy6yq

    If you need assistance updating WorkFlows, please contact James Campbell, the RSA System Supervisor, at rsahelp@railslibraries.info or 1-866-940-4083.

6. After you check the WorkFlows version number, click OK to close the pop-up box.

Enabling Multiple Windows Mode & Tabbed Windows in WorkFlows

In order to allow you to easily switch between the WorkFlows item group editor wizard and another wizard (for example, Item Search and Display), check the WorkFlows desktop preferences to make sure multiple windows mode and tabbed windows are enabled. These settings will only need to be adjusted once, but if you will use the item group wizard on another computer that has WorkFlows installed on it, you will need to repeat these steps on that computer.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
2. Go to the Preference menu at the top.
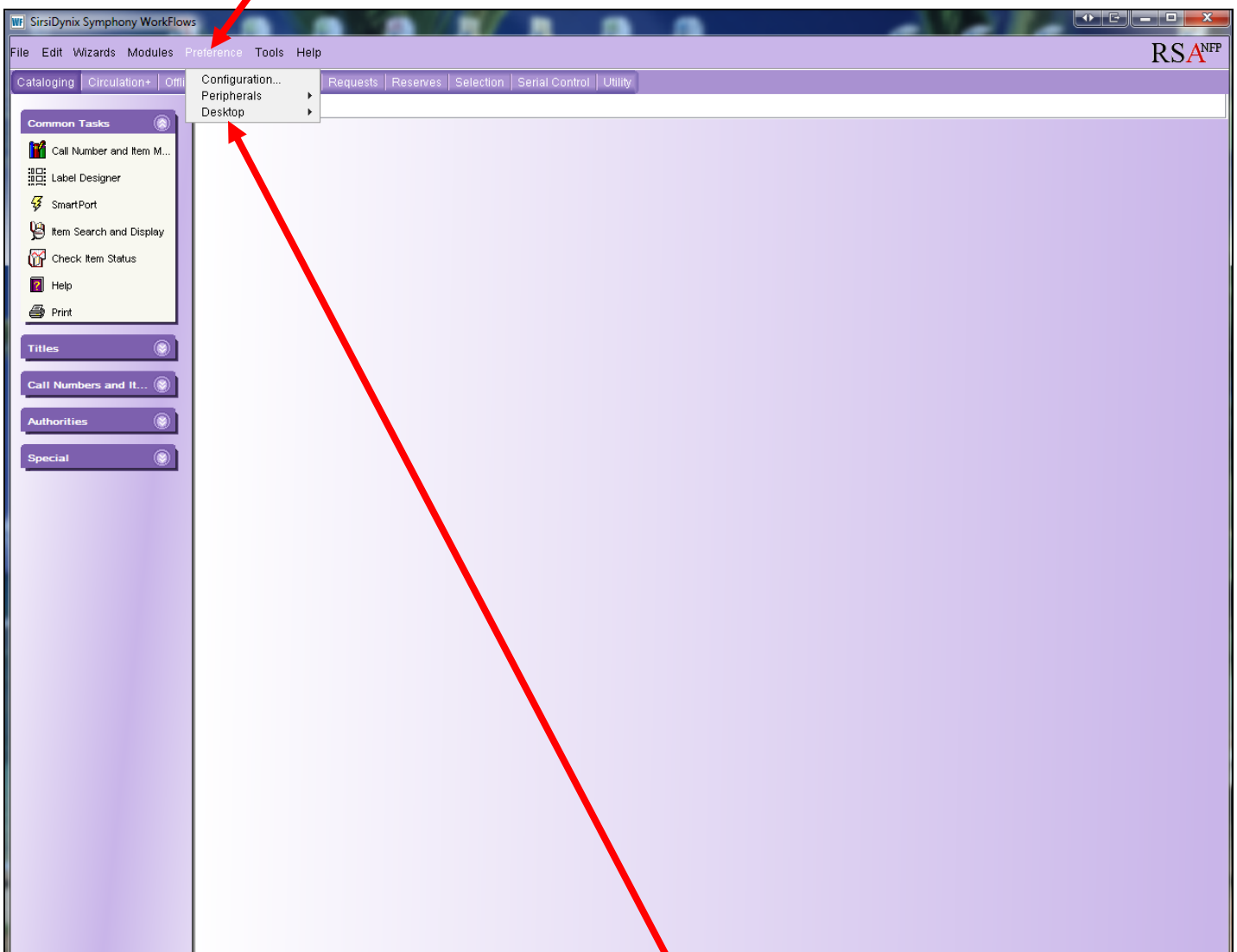
3. From the Preference menu, click on "Desktop."

4. From the next menu, click on "Desktop Setup…"
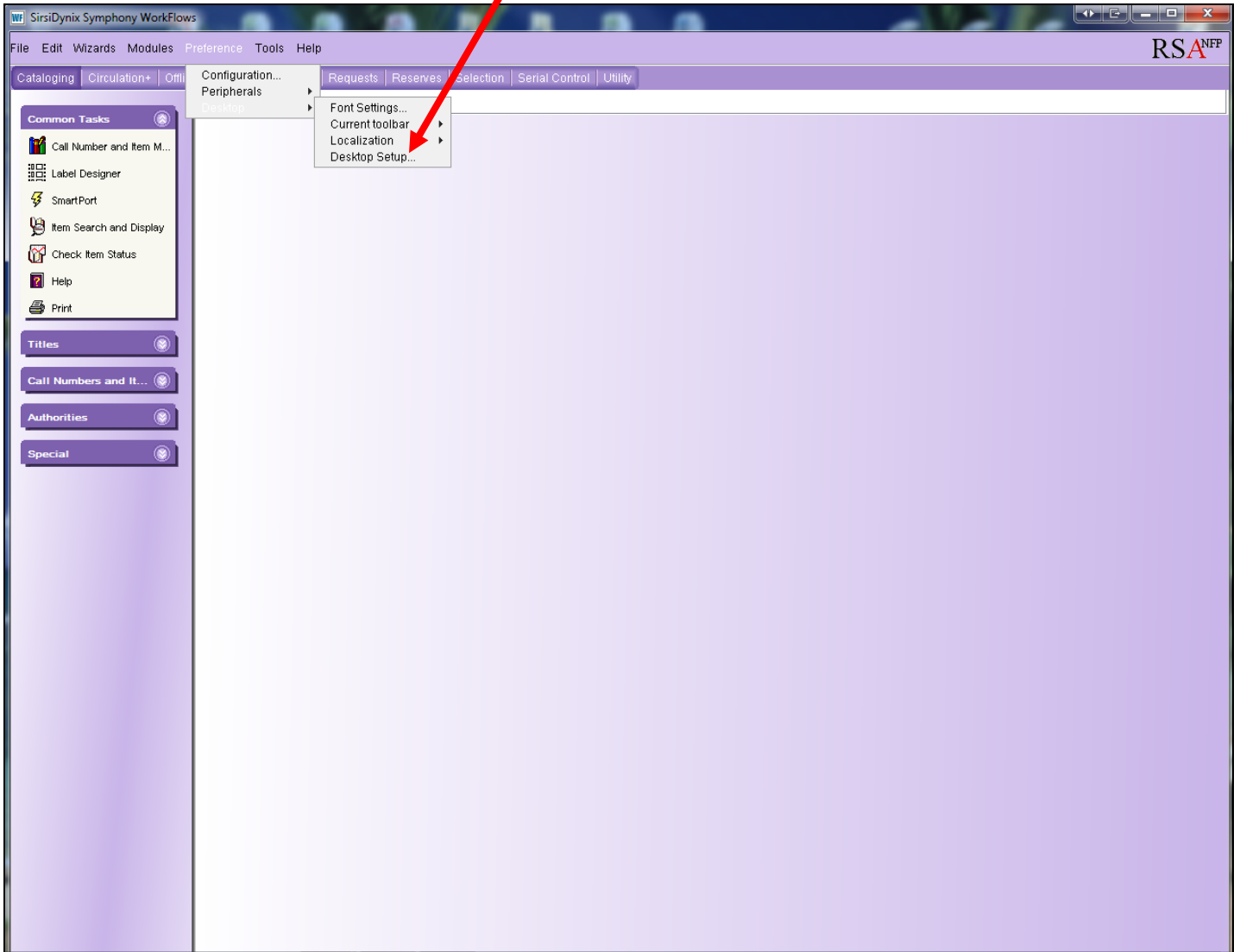
A Desktop Setup box appears:
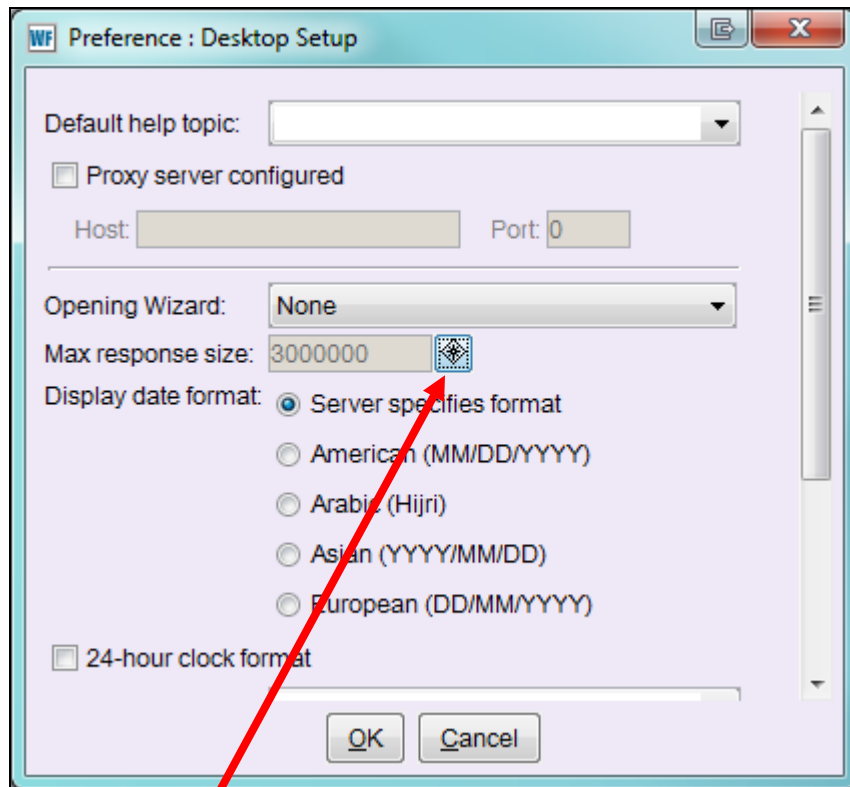
5. Click the gadget next to the max response size box.

6. Type 5000000 into the field and click OK:
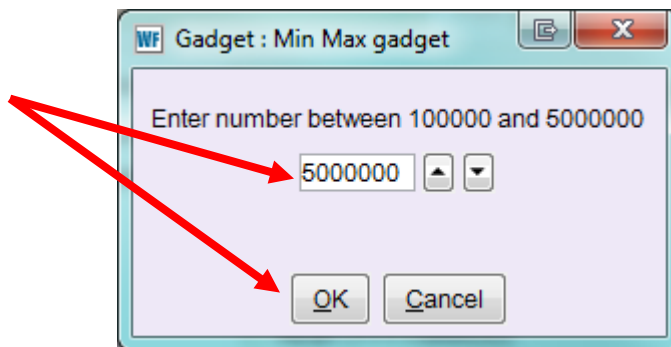
If 5000000 already appears as the max response size, click OK.

7. Scroll down to the bottom of the Desktop Setup box.
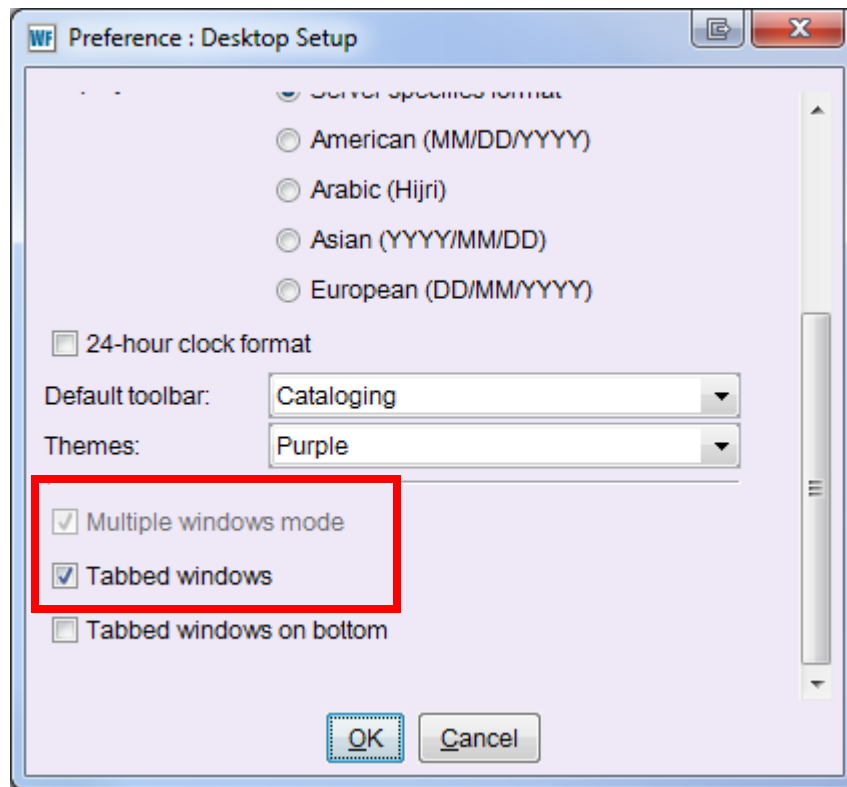
8. Check the box next to "Multiple windows mode."

9. Check the box next to "Tabbed windows" in order to display the tabs for open wizards at the top of the WorkFlows screen.

    If you prefer the tabs for the open wizards to display at the bottom of the WorkFlows screen, check the box next to "Tabbed windows on bottom."

10. Once you enable multiple windows mode and tabbed windows, click OK to close the Desktop Setup box.

11. A pop-up box appears, warning the changes will not take effect until you restart WorkFlows:
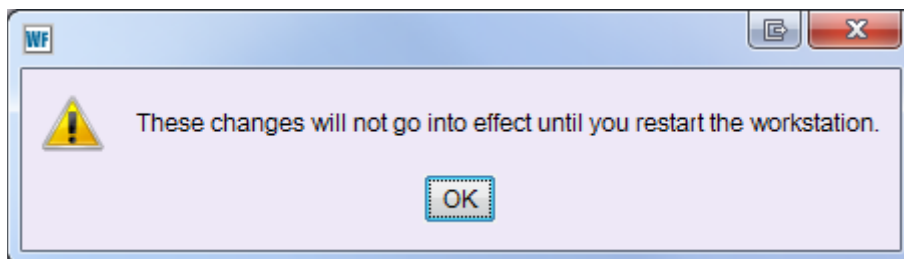
    Click OK to close the box.

12. Exit WorkFlows in order to activate multiple windows mode and tabbed windows. Click the red X in the upper right corner.
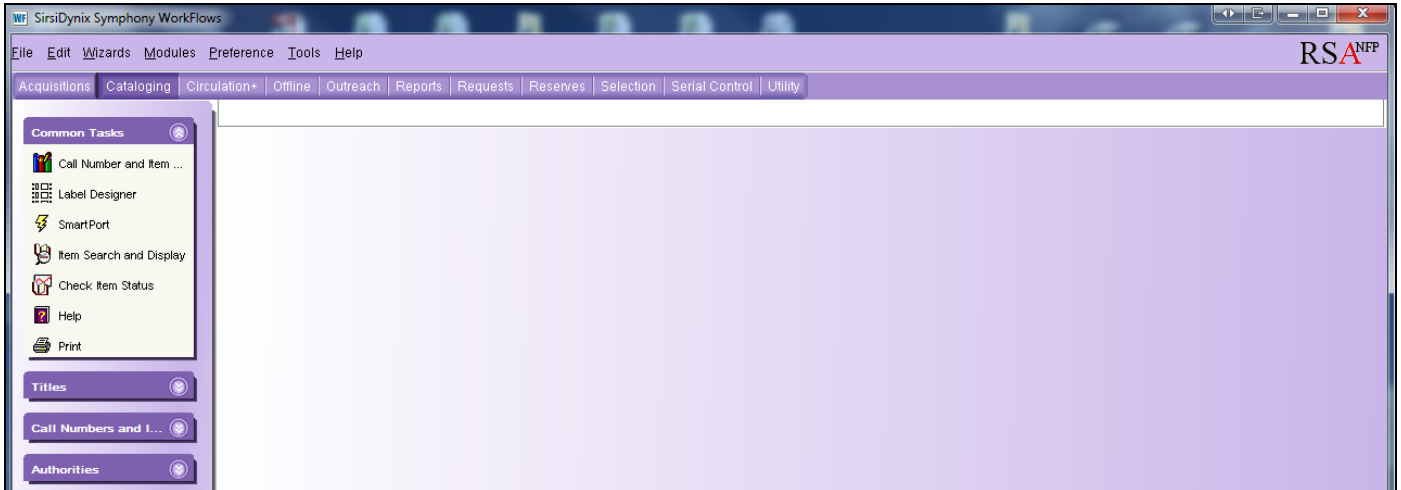
13. A pop-up will appear with the message, "This will halt the workstation":
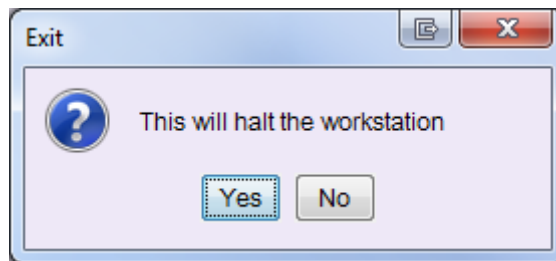
Click Yes.

WorkFlows will close. You should see your computer's desktop.

14. Double click on the WorkFlows icon on your computer's desktop. Log into WorkFlows using your library's TECH login.

15. Once you restart WorkFlows, you should be able to open multiple wizards at once. WorkFlows will display a tab for each open wizard at the top or bottom of the screen, depending on your selection in step 7 from above.

    The following screen shot shows WorkFlows with multiple windows mode and tabbed windows enabled to display at the top of the WorkFlows screen. The item group editor and the item search and display wizards are simultaneously open in the screen shot below.
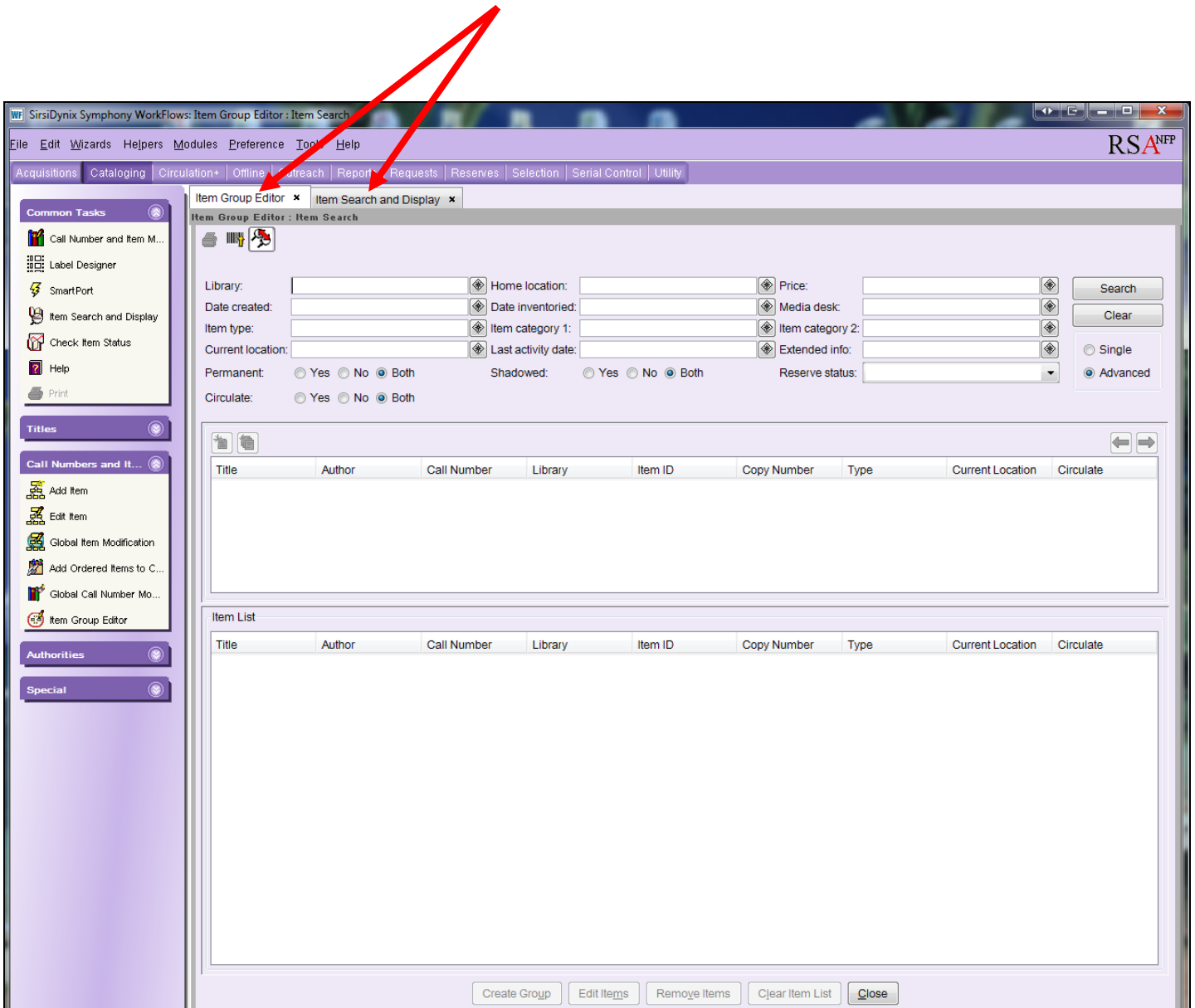
Setting Item Group Editor Wizard Properties

Before you use the item group editor wizard, check its properties to make sure it uses those listed below. Properties will only need to be adjusted once, but if you will use the item group wizard on another computer that has WorkFlows installed on it, you will need to repeat these steps on that computer.

1. Log into WorkFlows using your library's SUPER login.
   (*Important:* The SUPER login should *only* be used to adjust properties for the item group editor wizard, as well as properties for other WorkFlows wizards. Never catalog or circulate while logged in as SUPER.)
2. Click on the Cataloging module at the top.
3. Open the Call Numbers and Items toolbar on the left.
4. Put your cursor over the Item Group Editor wizard and *right* click.
5. Select Properties.
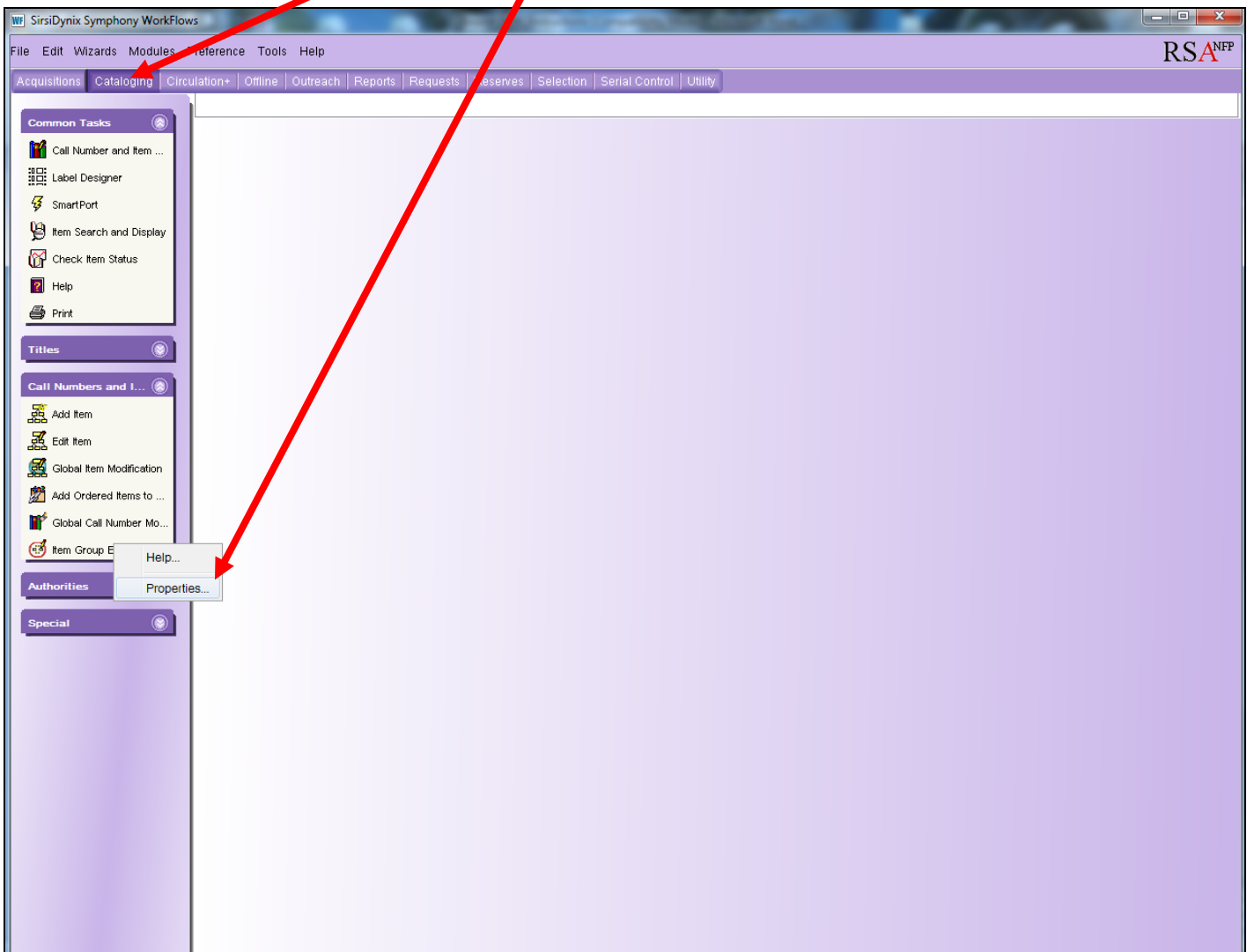
6. A Set Properties box appears. Click on the tab labeled "Behavior":

WF Item Group Editor : Set Properties

Display property page: ⚪ Wizard Startup ⦿ Never

Behavior | Defaults

☑ Update dynamic indexes when editing items

OK   Cancel
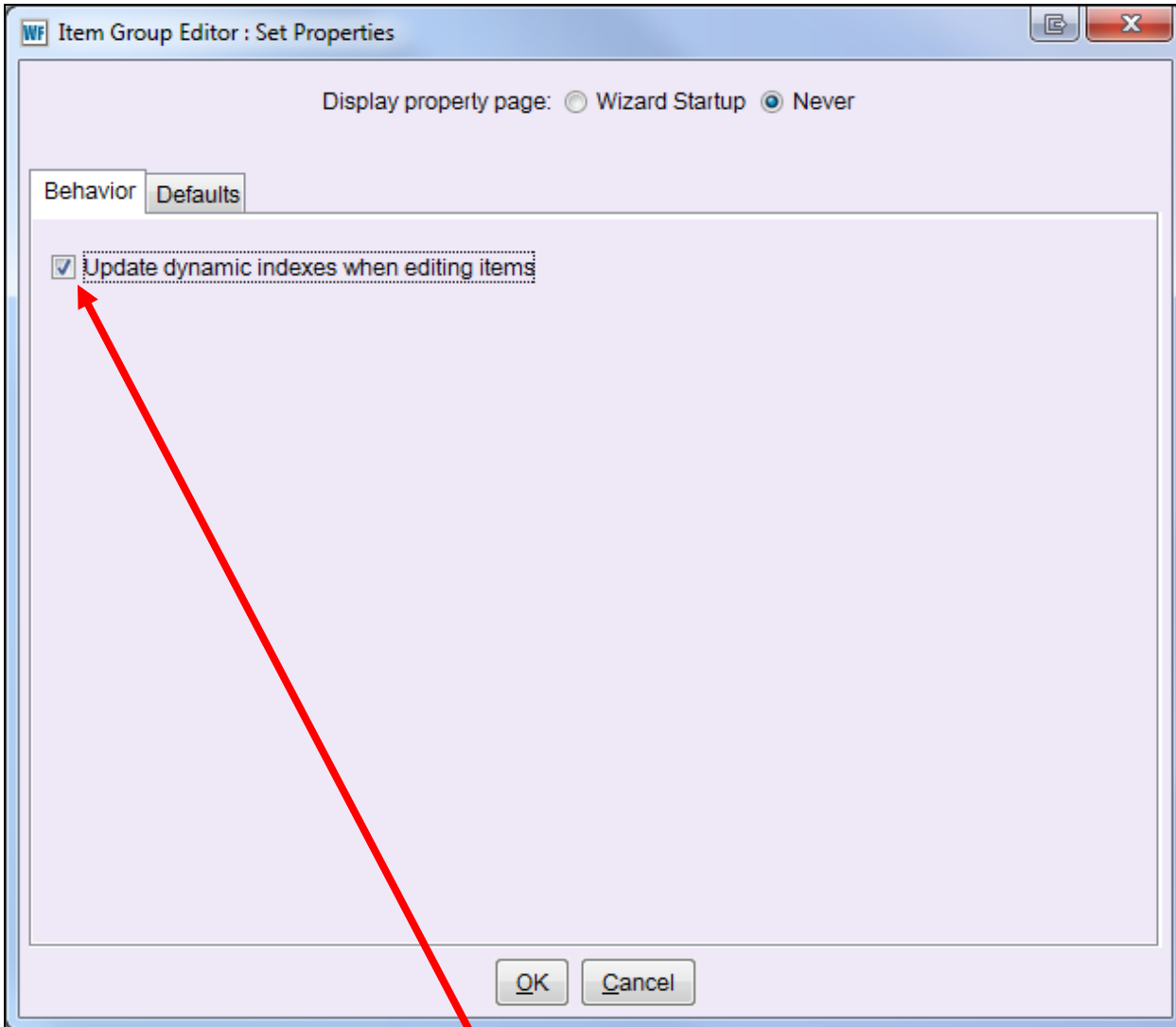
7. Check the box next to "Update dynamic indexes when editing items."

    If you modify items in the item group editor and then re-search for those items using the value(s) you just modified, the item group editor will retrieve the recently edited items only if your item group editor wizard is configured to update dynamic indexes.

8. In the Set Properties box, click on the tab labeled "Defaults."

9. Next to "Display property page," make sure the radio button next to "Never" is selected.
10. For "Start with," select the button next to "Item Search."
11. For the number of items per browse screen, enter 5000
12. For "Item Search," select the button next to "Advanced."
13. Use the index drop-down menu to select Item ID. This will serve as the default index if you perform a search using only one field in the item group editor.
14. *Optional*—Under "Item lists," you can select additional fields to display in the item lists generated by the item group editor. Author, copy number, and circulate flag are the optional fields you can include in the item list. You might find it helpful to select author.

Below is a screen shot of the Defaults tab in the item group editor's Set Properties box:

15. Click OK to close the pop-up box.

16. ***Important:*** To ensure WorkFlows saves the default properties for the item group editor, click the red X in the upper right corner of WorkFlows.
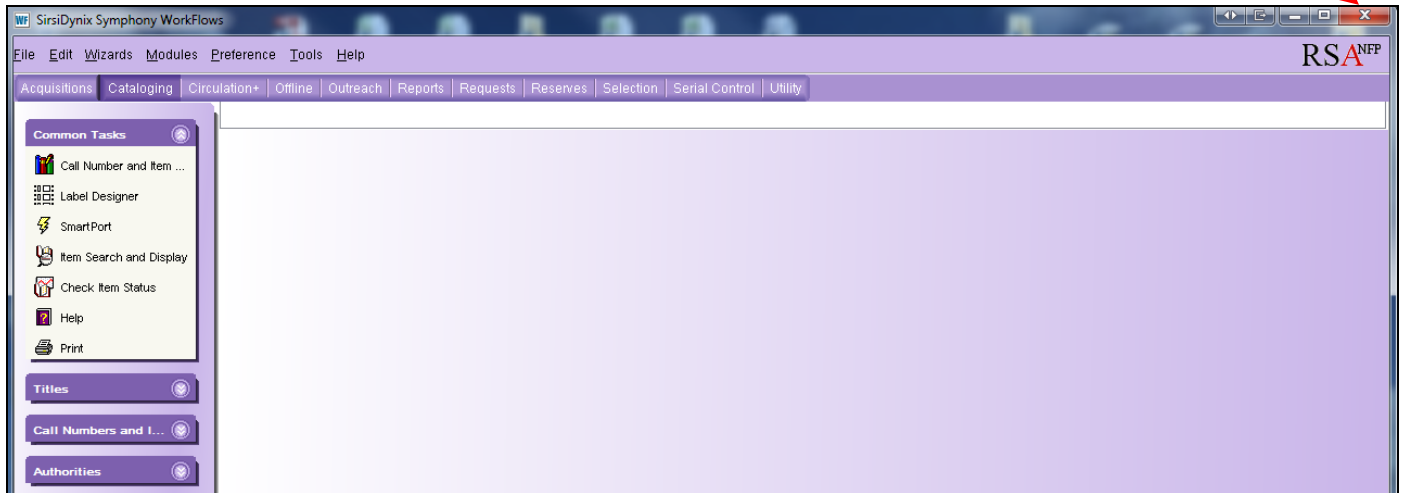
17. A pop-up will appear with the message, "This will halt the workstation." Click Yes.
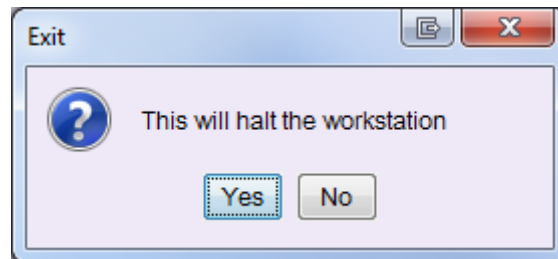
18. Another pop-up will appear with the message, "Properties have been changed. Would you like to save changes?" Click Yes.

If No is selected, none of the item group editor wizard's settings will be saved for your next WorkFlows session.
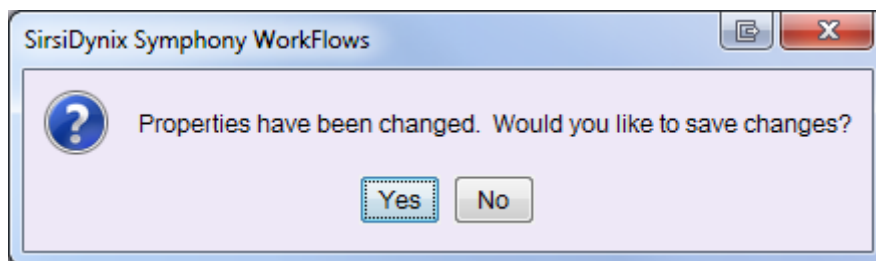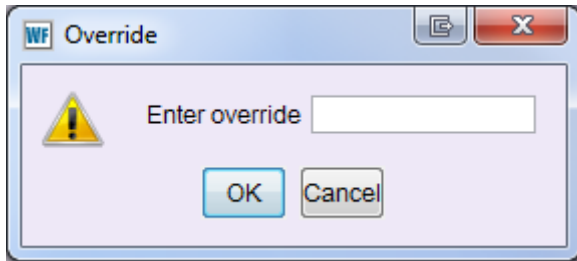
WorkFlows will close. You should see your computer's desktop.

Searching for Multiple Items

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@railslibraries.inf 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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

After you enter the override password, the item group editor's advanced search screen opens.

The top portion of the screen contains the various fields you can use to search for items.

The result list appears below the search fields.

The item list is below the result list. You will add results to the item list so that those items can be edited together or saved as a group for editing.
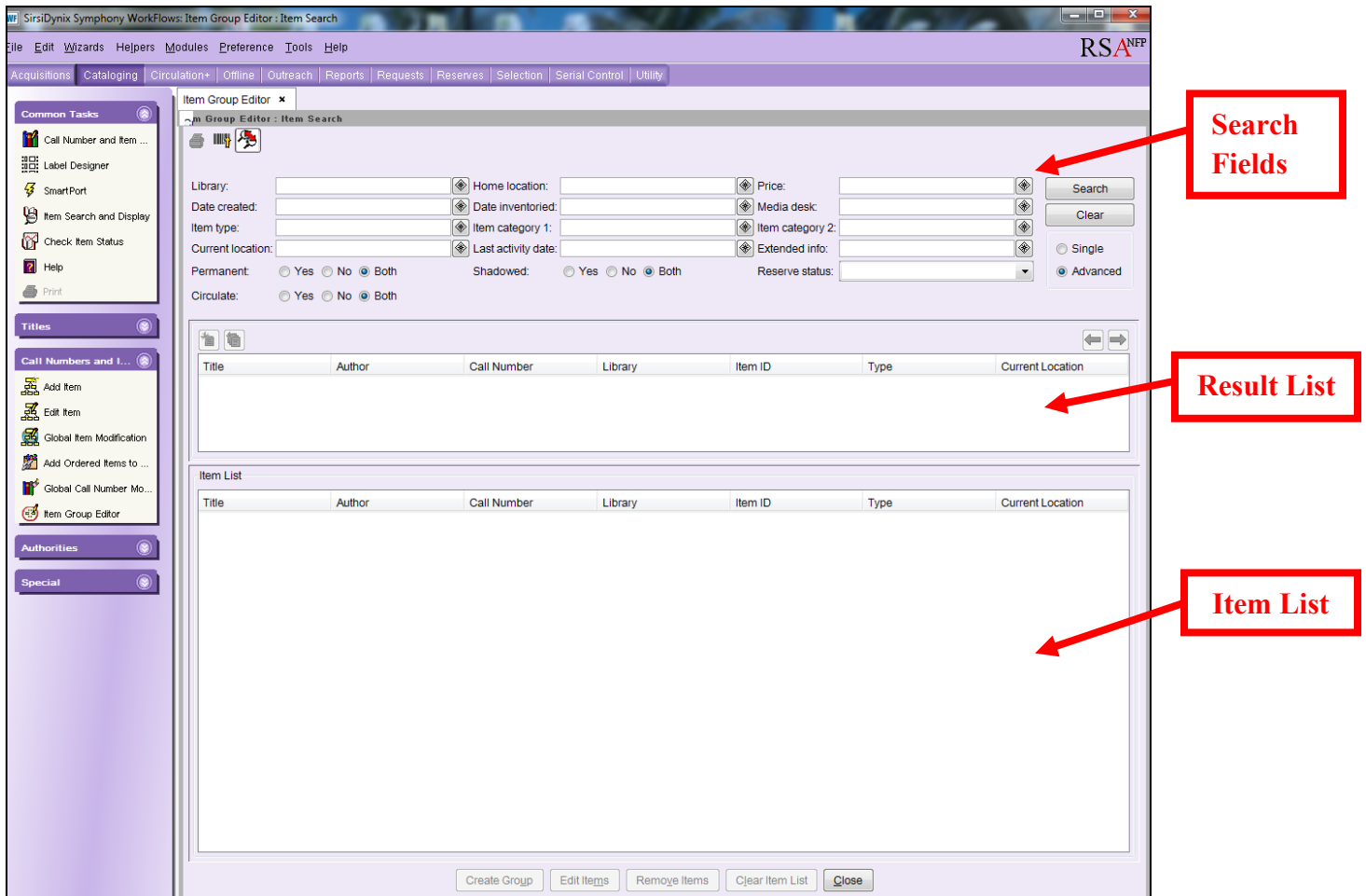
6. Select the values you want to use to search for items in your collection.

   Tips for using the item group editor's advanced search interface:

   - You can select a single value to search by, or you can select multiple values to search by.

   - The media desk and reserve status fields are not currently used by RSA libraries and should not be selected in your search.

   - A gadget button appears next to many of the search fields:
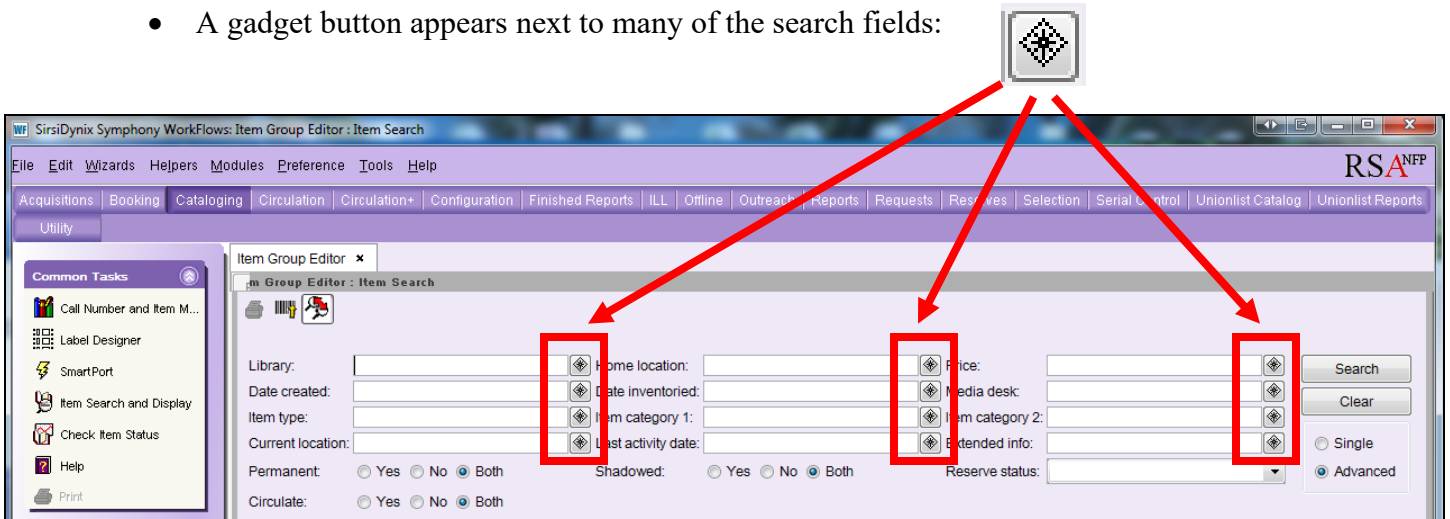
   - Click the gadget to open a box that will allow you to select one value or multiple values for that particular search field. The gadget box for the library value is shown below.

   - To select a value, click on it from the "List to choose from" on the left so that it appears in blue:
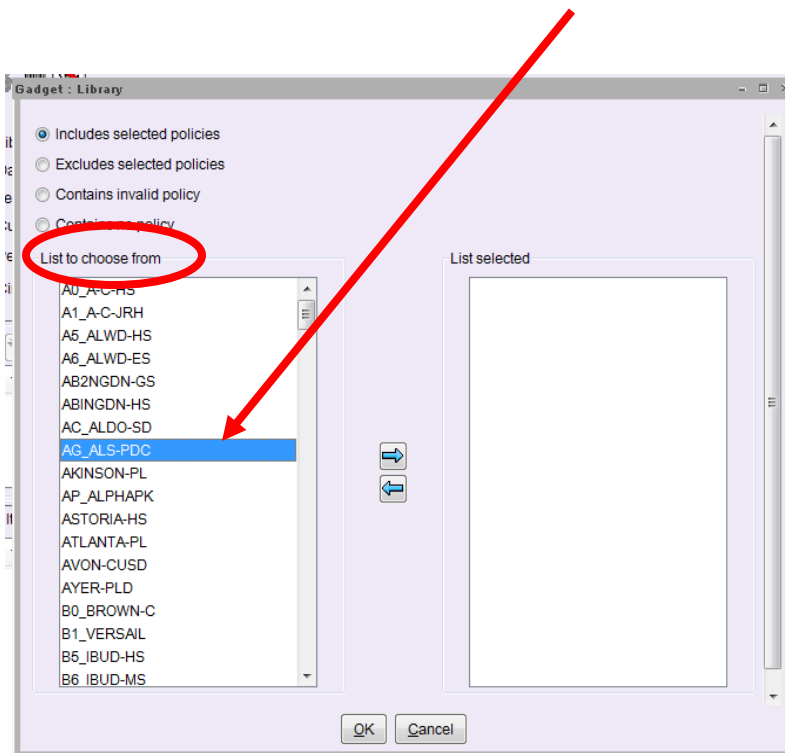
- In the gadget selection box, select a value or values from the "List to choose from." Click the [→] button to move the value(s) to the "List selected" on the right.

- To remove a value from the "List selected," click on that value and click the [←] button.

Important Note:
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.
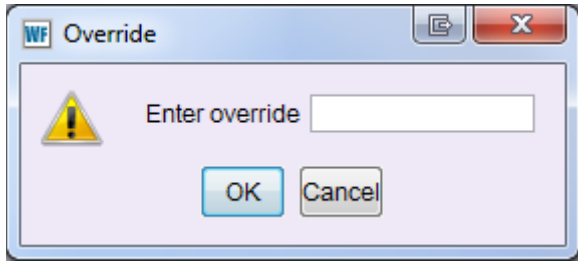
Please see the next section of this document for instructions how to search for items in your collection that are assigned codes that no longer appear in your WorkFlows drop-down menu.

- Several gadget selection boxes on the item group editor's advanced search screen include four options involving "policies."

    Below is a screen shot of these policy options for the library value:
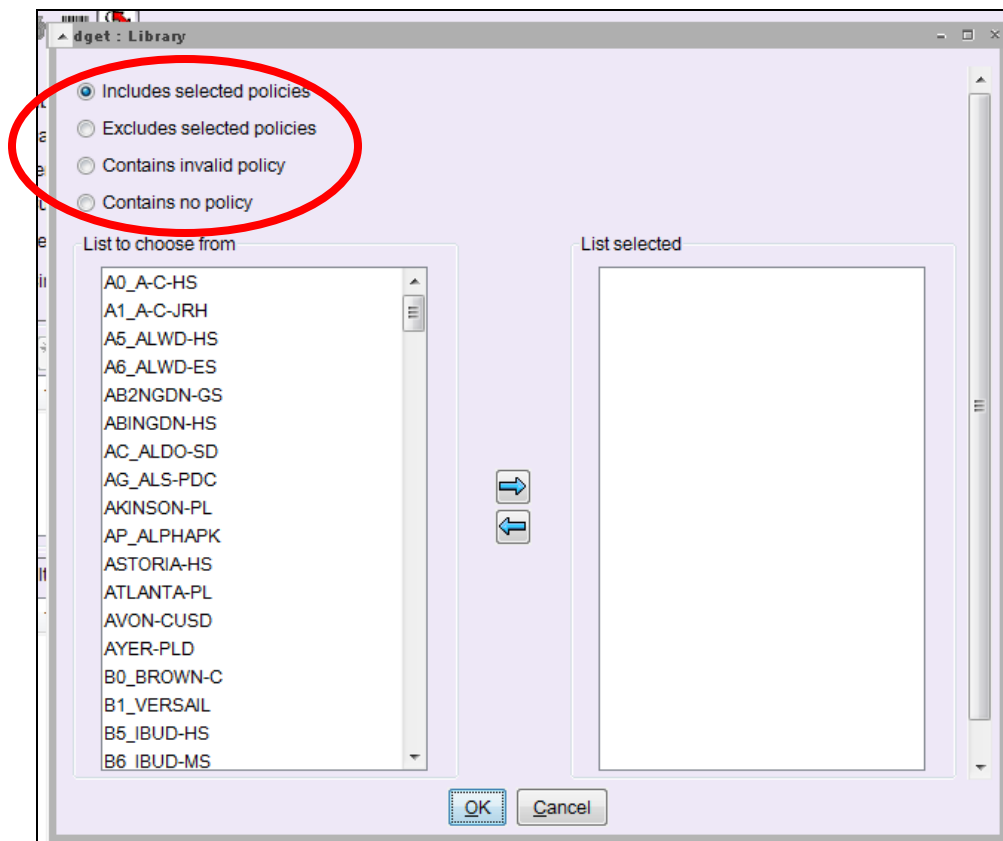
- *Includes selected policies* will include the specified values in the search results. This option is selected by default in the gadget selection box.

- *Excludes selected policies* will not include the specified values in the search results.

- *Contains invalid policy* will search for any values RSA has removed on a system-wide level and are no longer recognized as valid by WorkFlows. You should see an "Item not found in catalog" message if you attempt to perform a search that uses the invalid policy option.

- *Contains no policy* will search for any items that are assigned a blank value, if that value may be selected as a possible value for that field. "Contains no policy" is helpful to find those items to which your library assigned a blank value for item category 1, 2, 3, 4, or 5. For many of the search fields, "Contains no policy" will return no results if you select it and perform a search.

7. After you select the fields for your search on the advanced search screen, click the Search button or hit <Enter> on your keyboard.

   If you need to enter a new search, click the Clear button to quickly clear all of your search field selections.
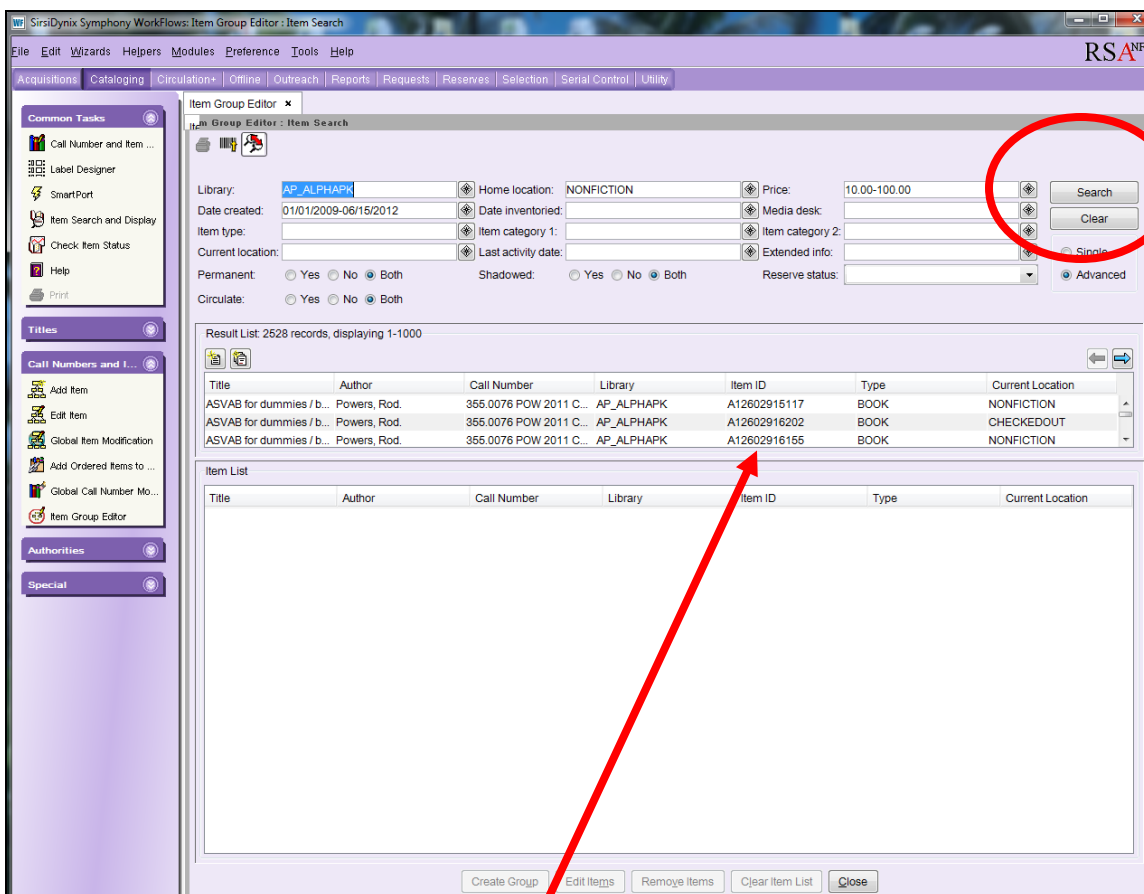
The results of your search display in the result list.

8. From the result list, select the item(s) you want to add to the item list. These are the items you will edit together or use to create a group.

    Tips for adding items to the item list:

    - If you only want to add *certain* search results to the item list, click on one of the search results and drag your cursor up or down to highlight multiple items in the search results list. To add the highlighted search results to the item list, click the "Add selected" helper button:

Title	Author	Call Number	Library	Item ID	Type	Current Location
One ball knits. Gifts : 20 ...	Habibur-Rahman, Fate...	746.432 HAB	AP_ALPHAPK	A12602823433	BOOK	NONFICTION
Finding Chandra : a true...	Higham, Scott.	364.1523 HIG	AP_ALPHAPK	A12602844219	BOOK	NONFICTION
War / Sebastian Junger.	Junger, Sebastian.	958.1047 JUN	AP_ALPHAPK	A12602844269	BOOK	NONFICTION
Sports from hell : my se...	Reilly, Rick.	796 REI	AP_ALPHAPK	A12602821368	BOOK	NONFICTION
An actor and a gentlem...	Gossett, Louis, 1936-	B GOSSETT	AP_ALPHAPK	A12602822550	BOOK	NONFICTION

Result List: 2528 records, displaying 1-1000

Item List

Title	Author	Call Number	Library	Item ID	Type	Current Location

    - If you want to add *all* of the items that are displayed on the *current page* of search results to the item list, click the "Add all" helper button:

Result List: 2528 records, displaying 1001-2000

Title	Author	Call Number	Library	Item ID	Type	Current Location
Haunted Hollywood : tin...	Ogden, Tom.	133.1097 OGD	AP_ALPHAPK	A12602763065	BOOK	NONFICTION
Hope for animals and th...	Goodall, Jane, 1934-	591.68 GOO	AP_ALPHAPK	A12602763170	BOOK	NONFICTION
I'm dying up here : heart...	Knoedelseder, William, ...	792.7609 KNO	AP_ALPHAPK	A12602763227	BOOK	NONFICTION
The score takes care of i...	Walsh, Bill, 1931-2007.	658.4092WAL	AP_ALPHAPK	A12602763667	BOOK	NONFICTION
The Lampshade Lady's ...	Lake, Judy.	745.5932 LAK	AP_ALPHAPK	A12602764794	BOOK	NONFICTION

Item List

Title	Author	Call Number	Library	Item ID	Type	Current Location

Important: Only 5,000 items may be added to the item list at one time. Editing a list of more than 5,000 items will significantly slow WorkFlows. To avoid slow performance, please limit your item list to 5,000 items or less.

The "Add all" helper button adds only those items displayed on the *current page* of results. You may use the blue arrow buttons for "Search Forward" and "Search Backward" to navigate through the search results.

Remember: Only 5,000 items may be added to the item list at one time. Your library should edit no more than 5,000 items per day.

The navigation buttons are circled in the screen shot below. WorkFlows may take a minute or two to navigate between pages of search results.
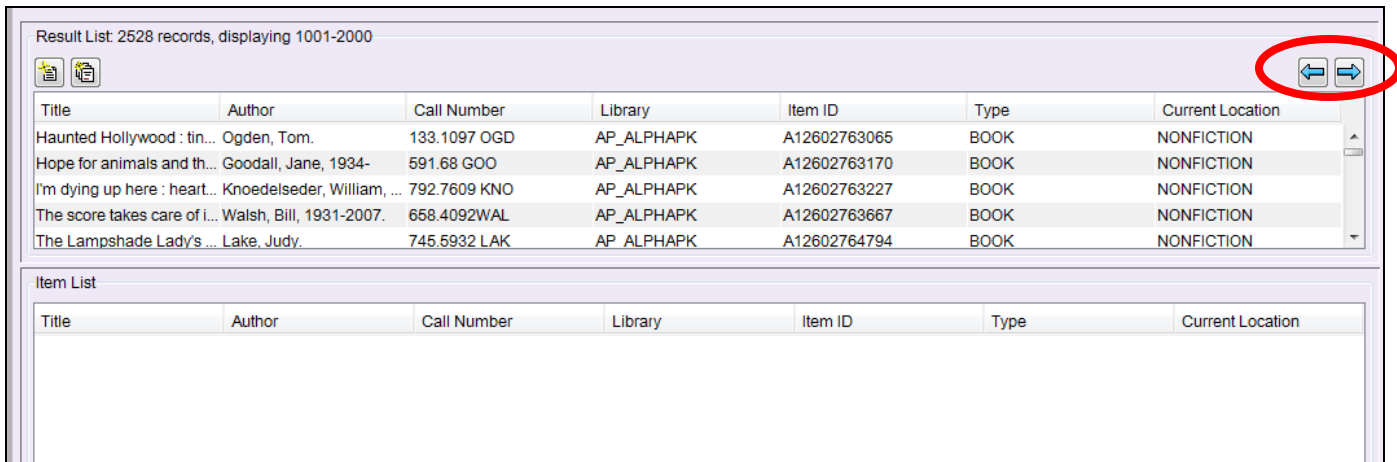
- You can search for other libraries' items in the item group editor wizard. However, WorkFlows will not allow you to add other libraries' items to the item list. If you click either the "Add selected" or the "Add all" helper button to try to add items not created by your library to the item list, WorkFlows will simply not add the items. No error message will appear.

- You can easily remove items from the item list.

  If you only want to remove *certain* items from the item list, click one of the items in the item list so that it appears in blue. Drag your cursor up or down to highlight multiple items that are listed consecutively. Click the "Remove Items" button to remove the highlighted items.
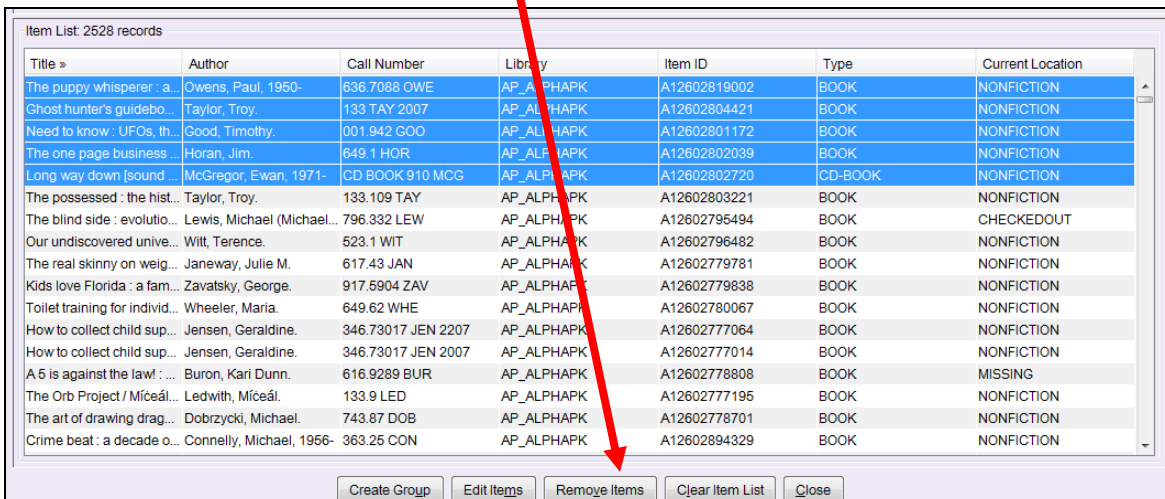
The highlighted items will immediately be removed from the item list. WorkFlows will not prompt you to confirm the removal.

- The total number of items currently in the item list displays at the top of the list (circled below).

  Remember: Only 5,000 items may be added to the item list at one time. Your library should perform no more than 5,000 total edits in a single day.

- If you want to remove *all* items from the item list, you do not need to highlight all of the items. Simply click the "Clear Item List" button.

All of the items will immediately be removed from the item list. WorkFlows will not prompt you to confirm the removal.

Searching for Items Assigned Cataloging Codes No Longer in Your WorkFlows Menu

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 Supervisor, at erica.laughlin@railslibraries.info or 1-866-940-4083.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The advanced search screen opens. Click the gadget button next to the library field:
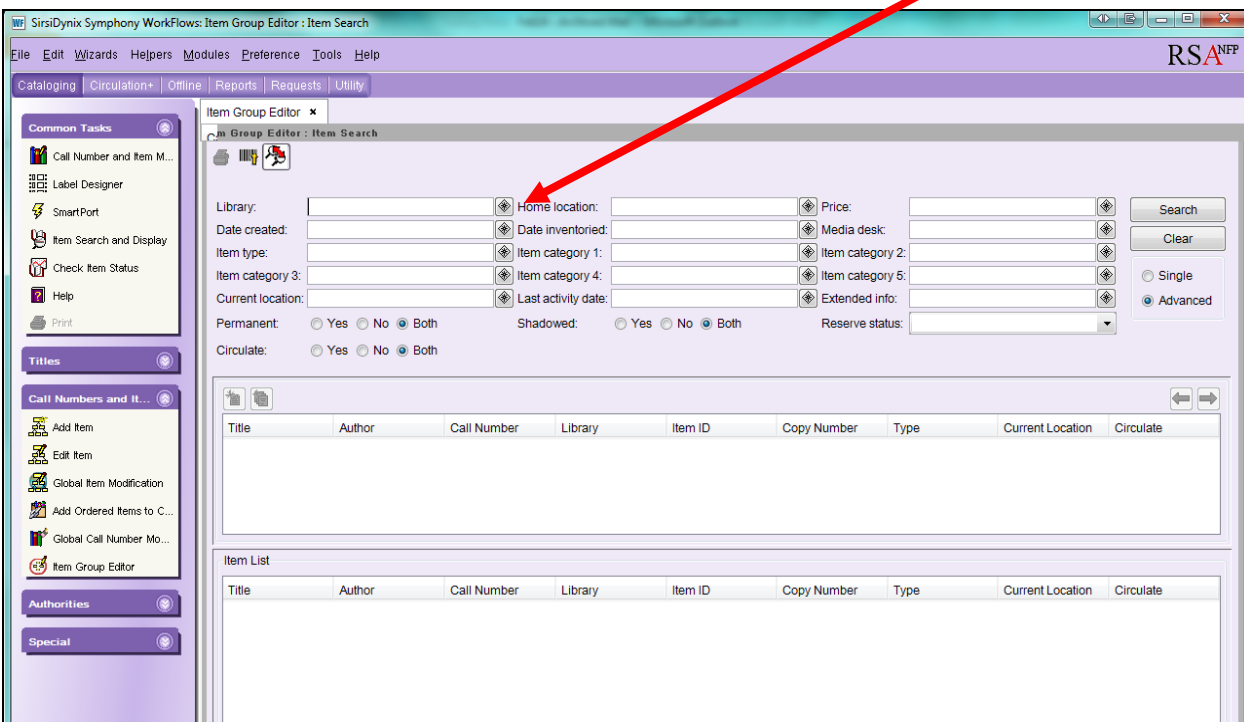
7. From the gadget selection box, click on your library in the list on the left. Click the arrow to move it to the list selected on the right.

   In the example below, the Viola Public Library is selected. Please select your library from the list on the left.
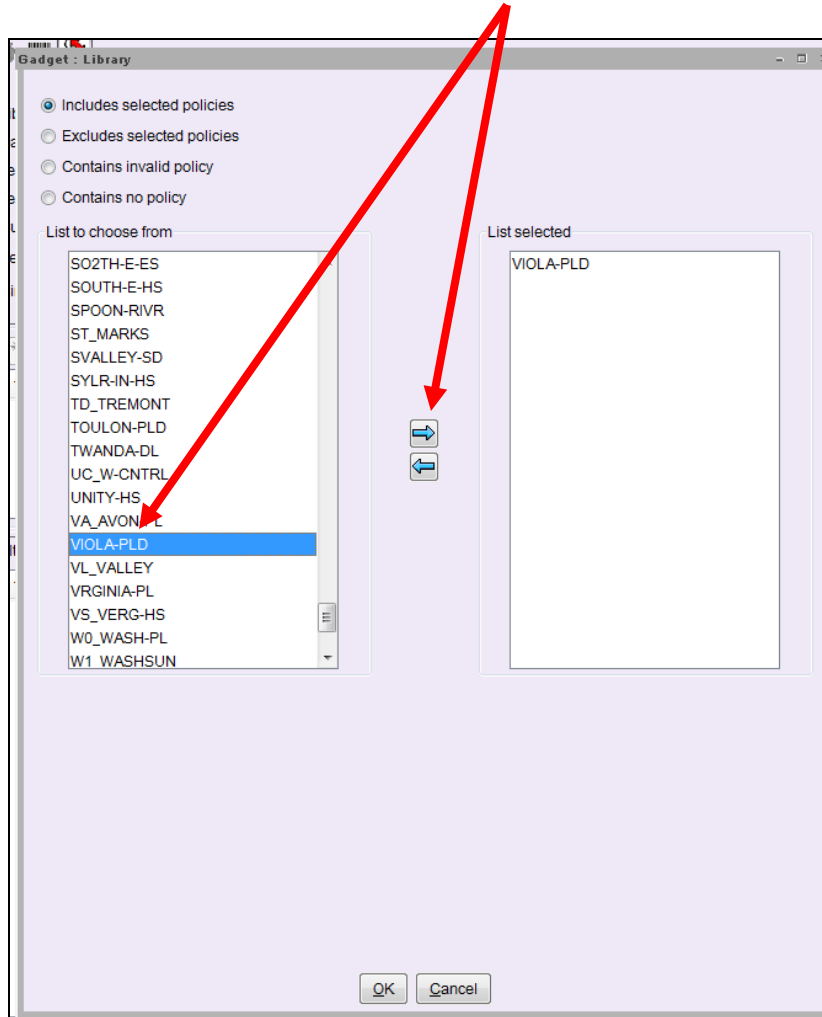
8. Once you click OK, the gadget selection box will close. The name of your library should appear in the library search field.

   Viola Public Library appears in the example below:
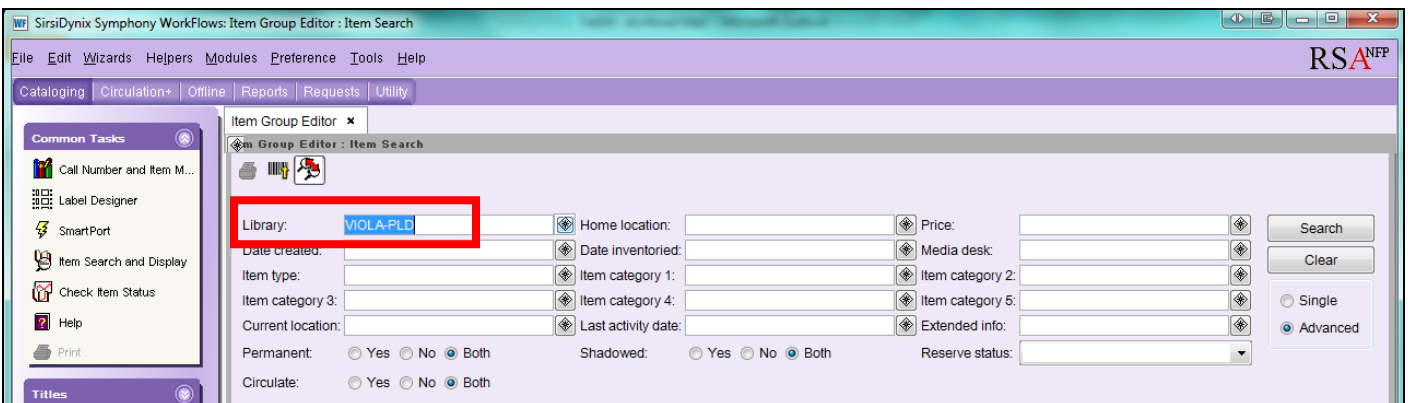
9. Click the gadget button next to the field by which you want to search (home location, item type, or item category 1, 2, 3, 4, or 5).

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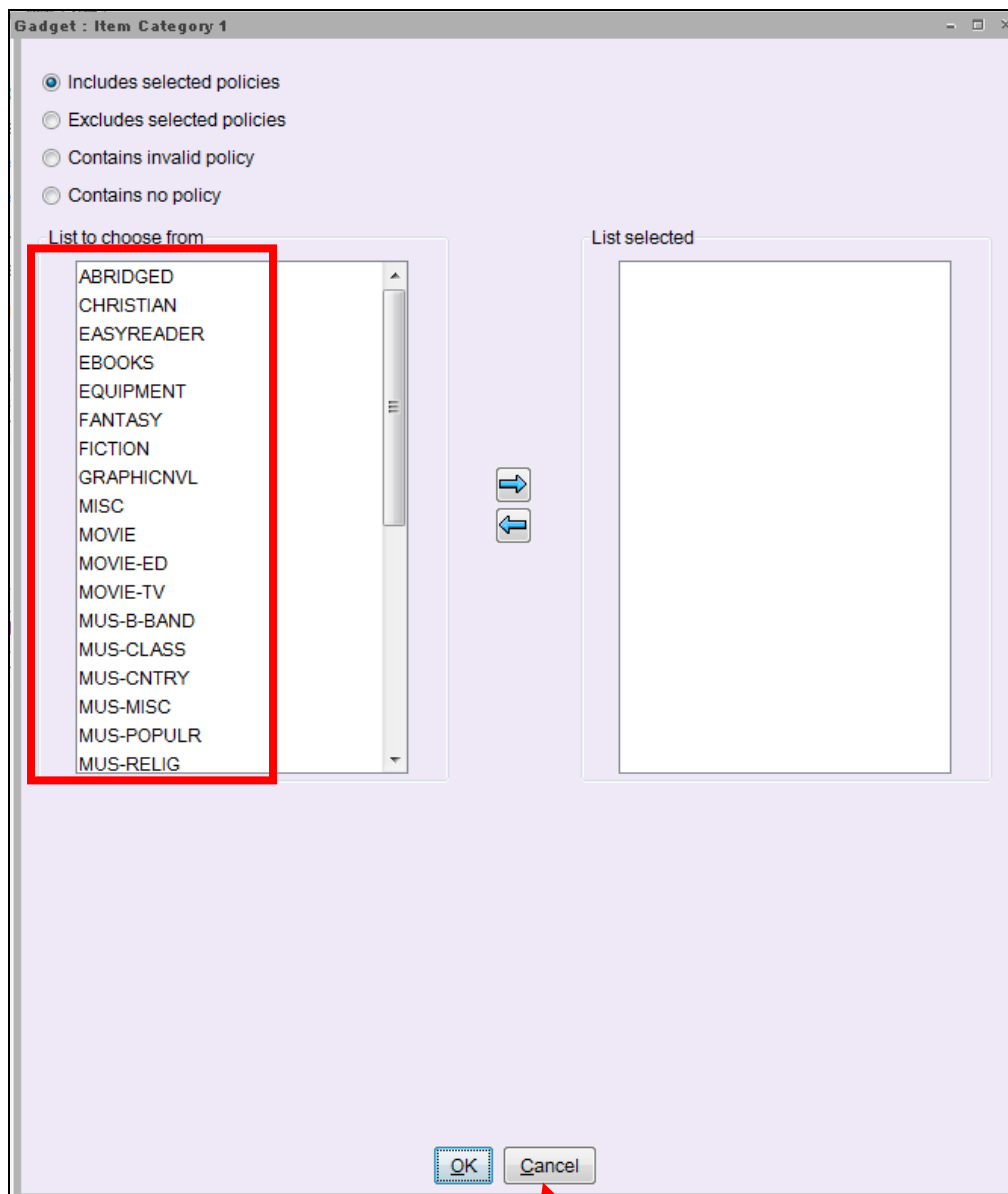
10. Since the code is unavailable for you to select, click cancel to close the gadget selection box.

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.
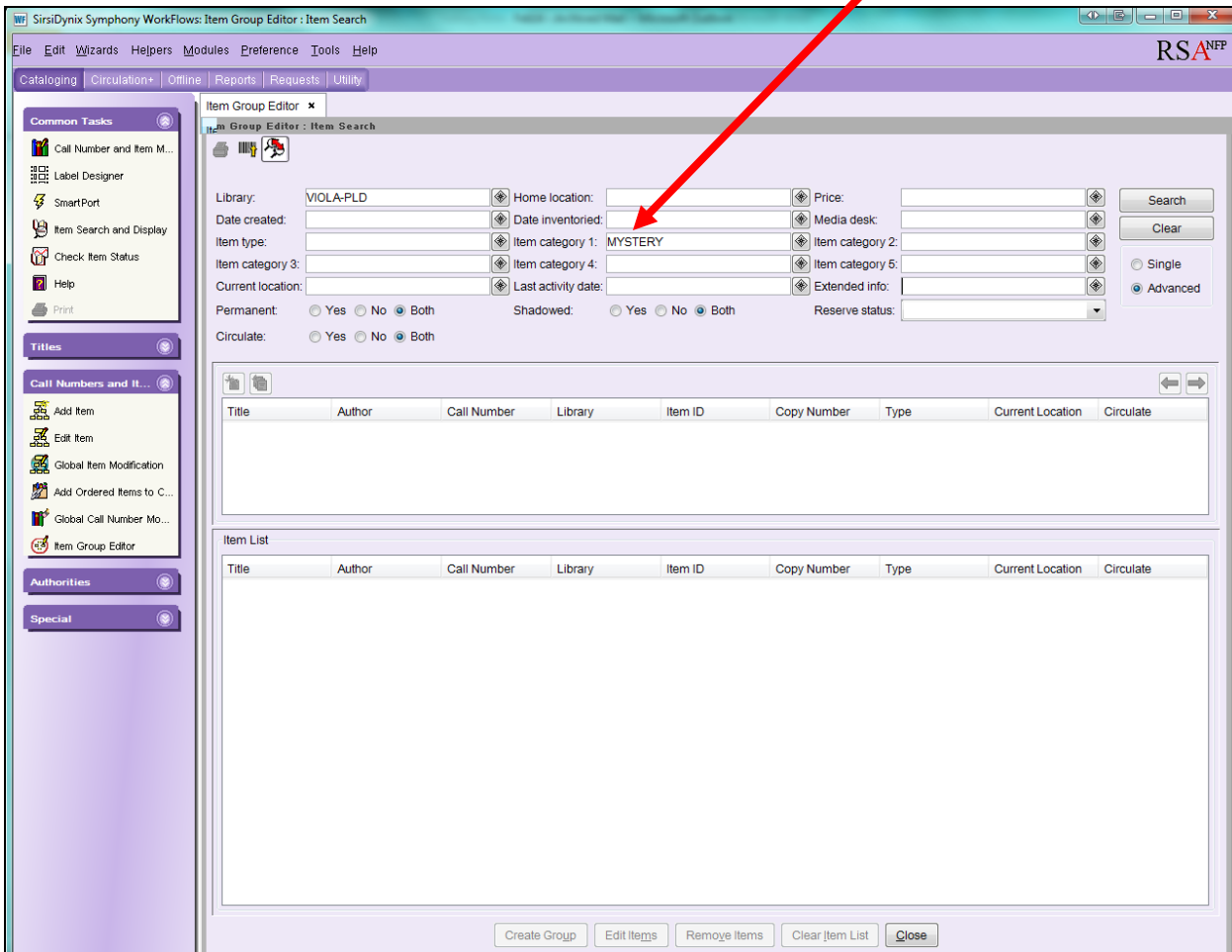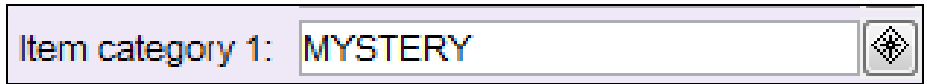
    You must type the code in uppercase.

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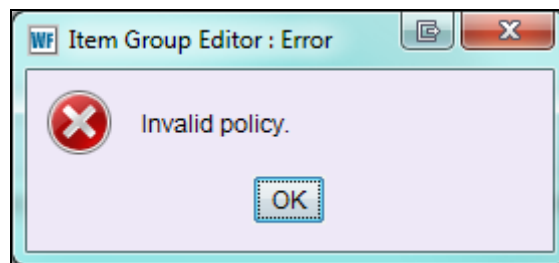
12. After you type the code in upper case into the search field, a list of items in your collection that are still assigned that code will display in the result list. The item group editor is able to retrieve the items even though the code no longer appears in your WorkFlows drop-down menu.

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

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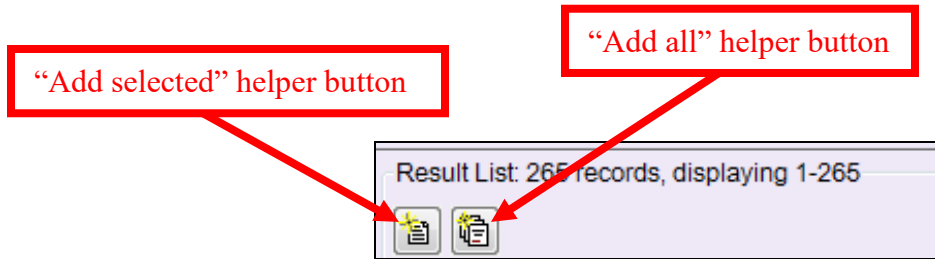
In the example below, the "Add all" helper was clicked, which moved all results to the item list.

14. Create a group of the items or edit them. See the following sections of this document for instructions:
   - Editing an Unsaved Item List, beginning on page 64.
   - Saving an Item List as a Group, beginning on page 78.

Searching for a Single Item

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The advanced search screen opens. Click the radio button next to "Single."
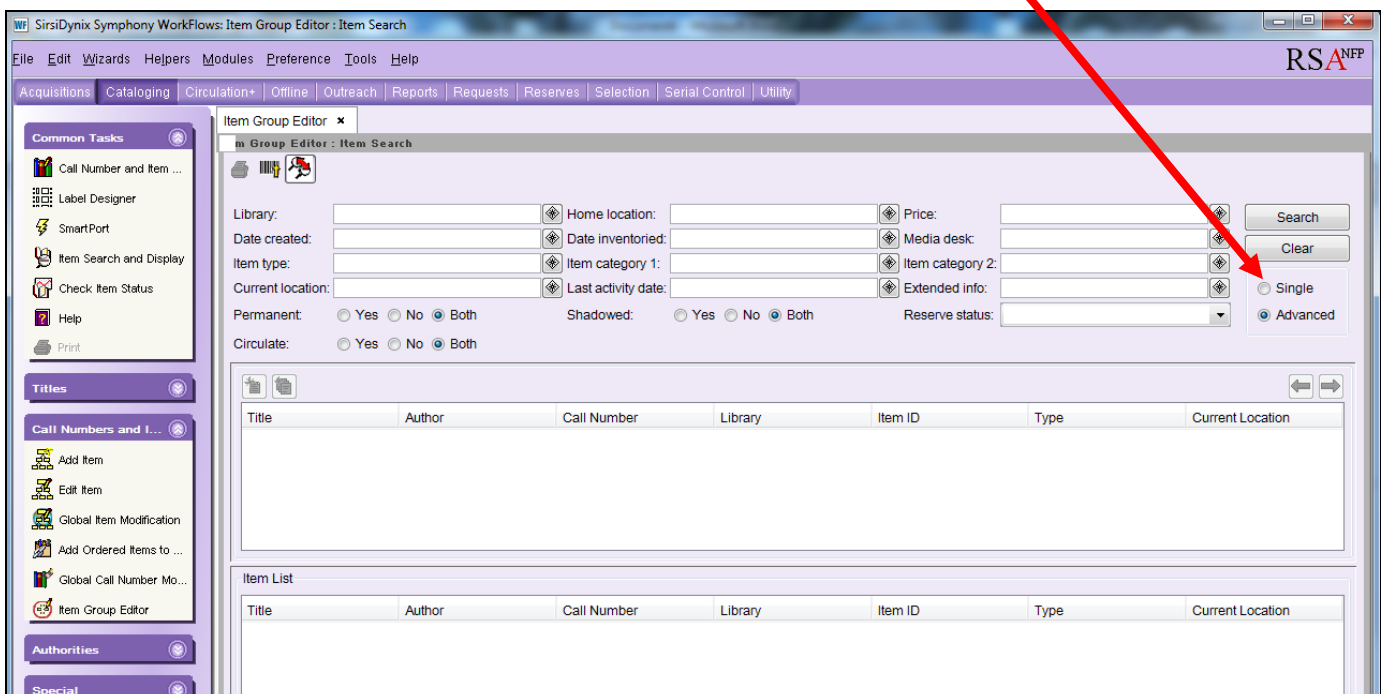
7. The item search screen opens.

   Item ID should appear as the default in the index drop-down menu if you selected item ID in the item group editor wizard's properties.

   The single search by item ID is most useful if you need to retrieve one item in the item group editor.

   Scan or type in the barcode in the item ID box that appears below the index drop-down menu.
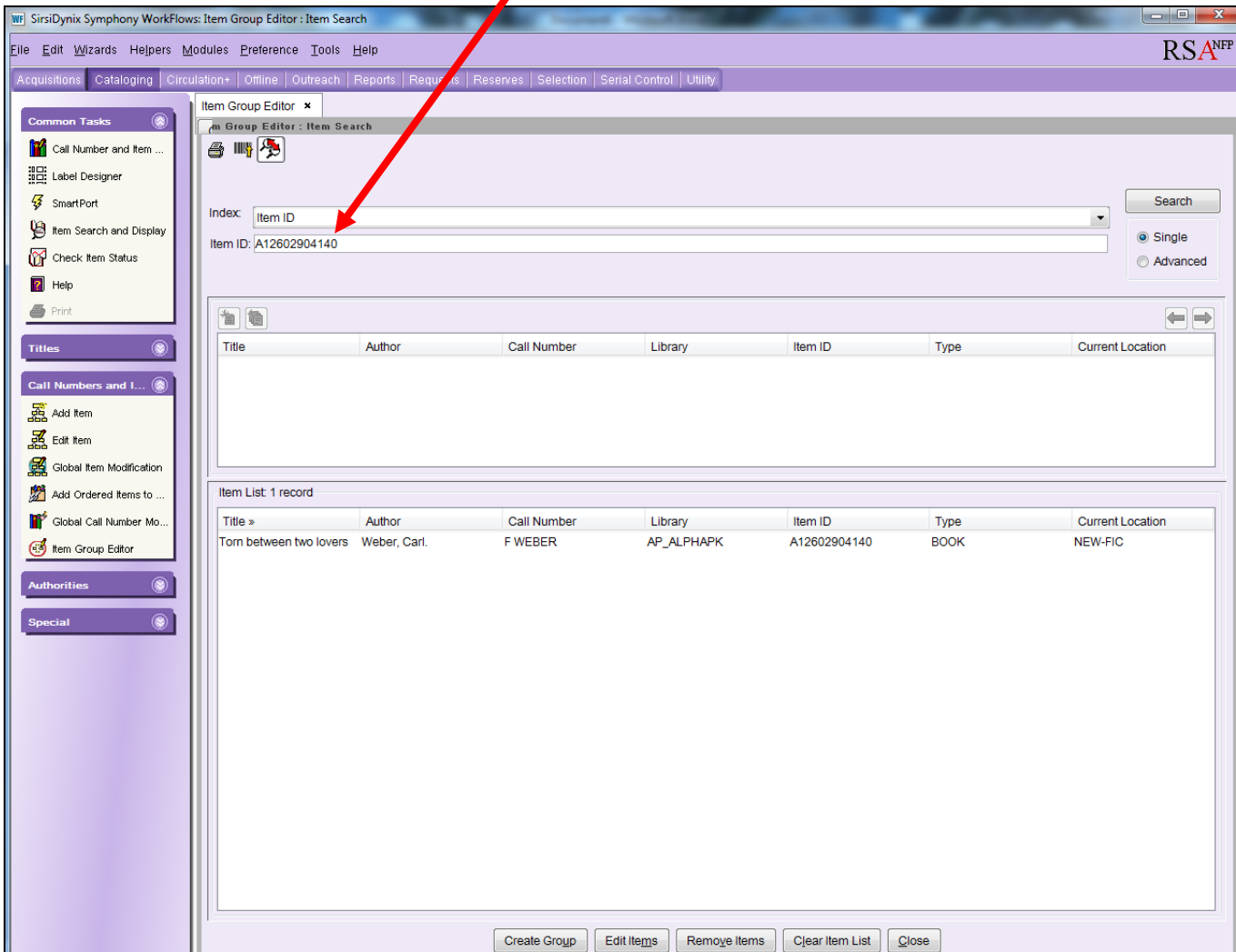
To select a search index other than item ID, click the index drop-down menu to select a different index. Once selected from the drop-down menu, many of the indexes display a gadget button to help you expand or limit your search. Other search index options, once they are selected from the index drop-down menu, provide a radio button that can be used to expand or limit the search.

Searches in the item group editor's single search interface that use indexes other than item ID will not be very helpful for retrieving items in your collection. Searches in this interface that are not based on the item ID will retrieve *all* records in *all* RSA libraries that meet your selection in the index menu. If an index other than item ID is selected, search results will *not* be limited to only those items owned by your library.

8. After you enter your search in the single search interface, click the Search button or hit <Enter> on your keyboard.

    If you searched by item ID, the item will appear in the item list (circled below).
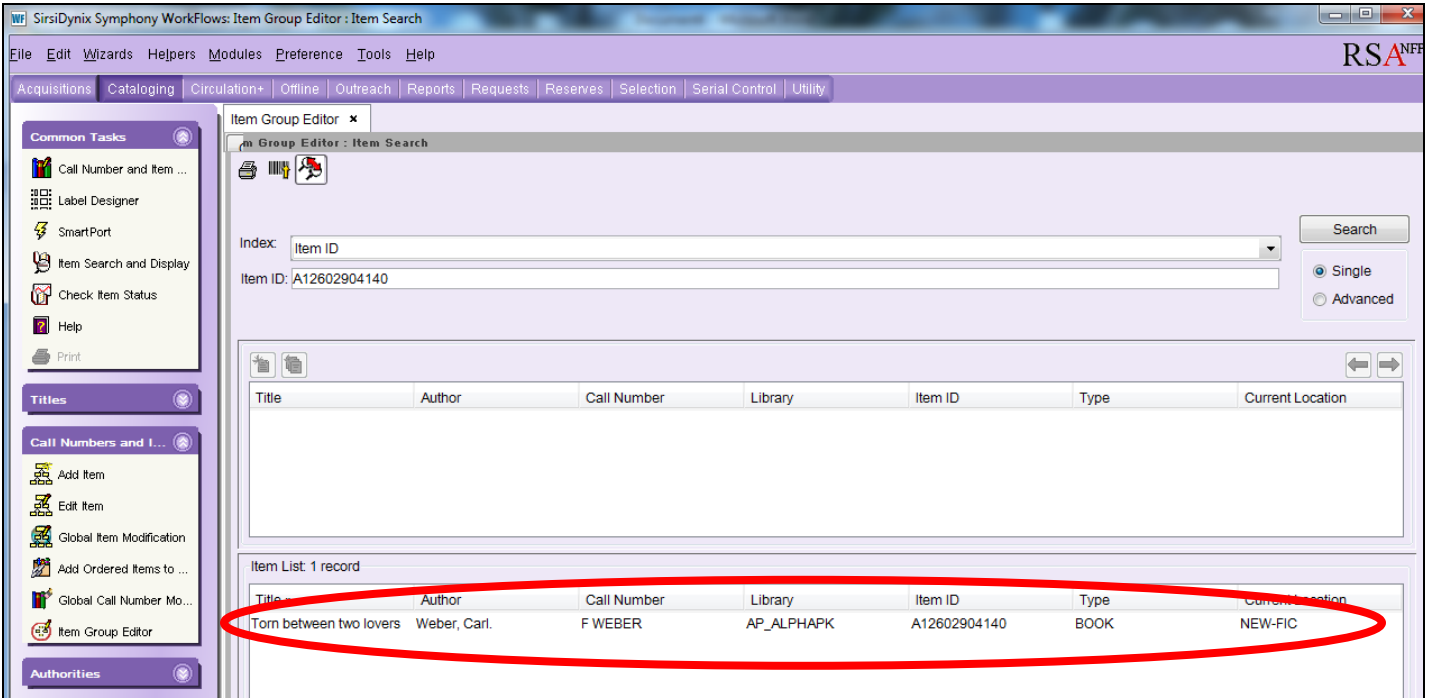
If you performed a search using an index other than item ID, the items will display in the result list, above the item list (circled below).
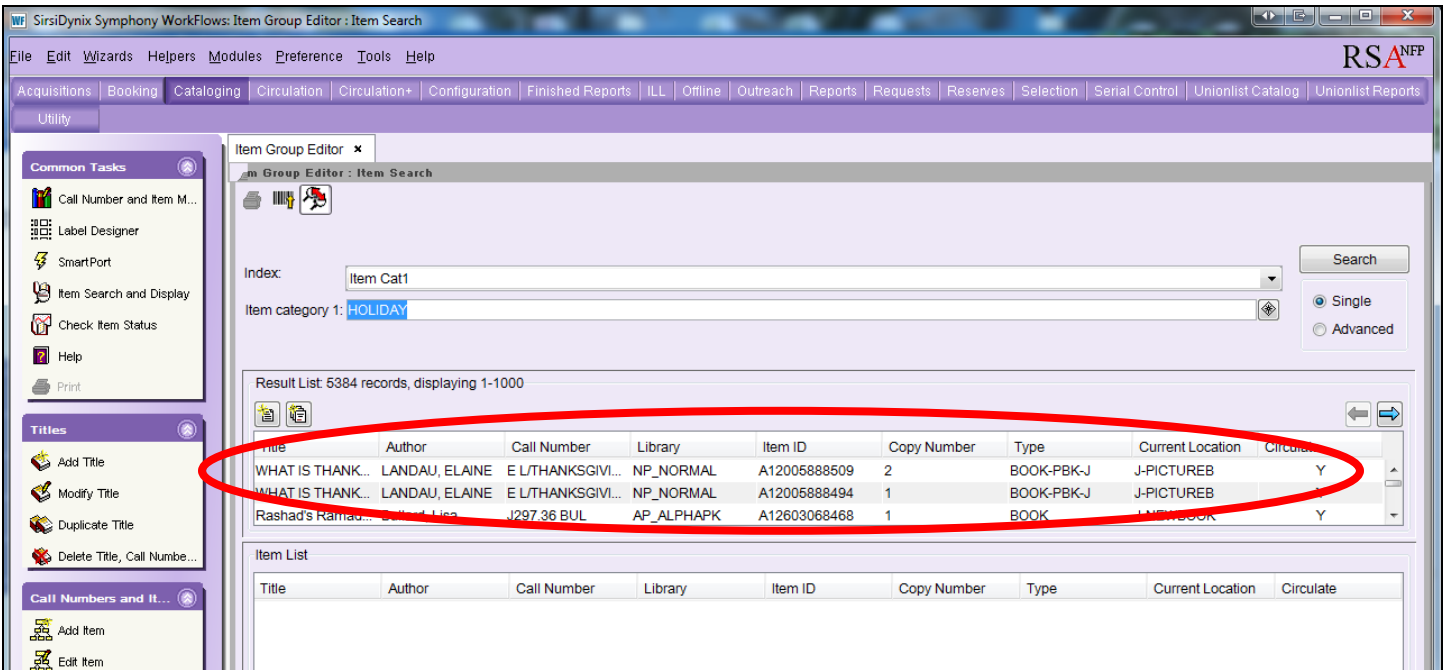
Using Web Reporter to Generate a List of Item IDs

The item group editor wizard includes the option to upload a list of item IDs that all need the same edit(s) performed on them. RSA recommends using Web Reporter to generate a list of the item IDs that need to be edited in batch in the item group editor.

Please note if you would like a report of your library's items assigned an item category 3, 4, or 5 code, RSA staff must run the report for you in WorkFlows. Reports for item categories 3, 4, and 5 are unavailable in Web Reporter.

1. To access Web Reporter, go to http://webreporter.alsrsa.org/symphonywebreporter/asp/Main.aspx

   Note: Web Reporter is not compatible with the Firefox browser. RSA recommends using Internet Explorer to access Web Reporter.

2. The Web Reporter login page will open:
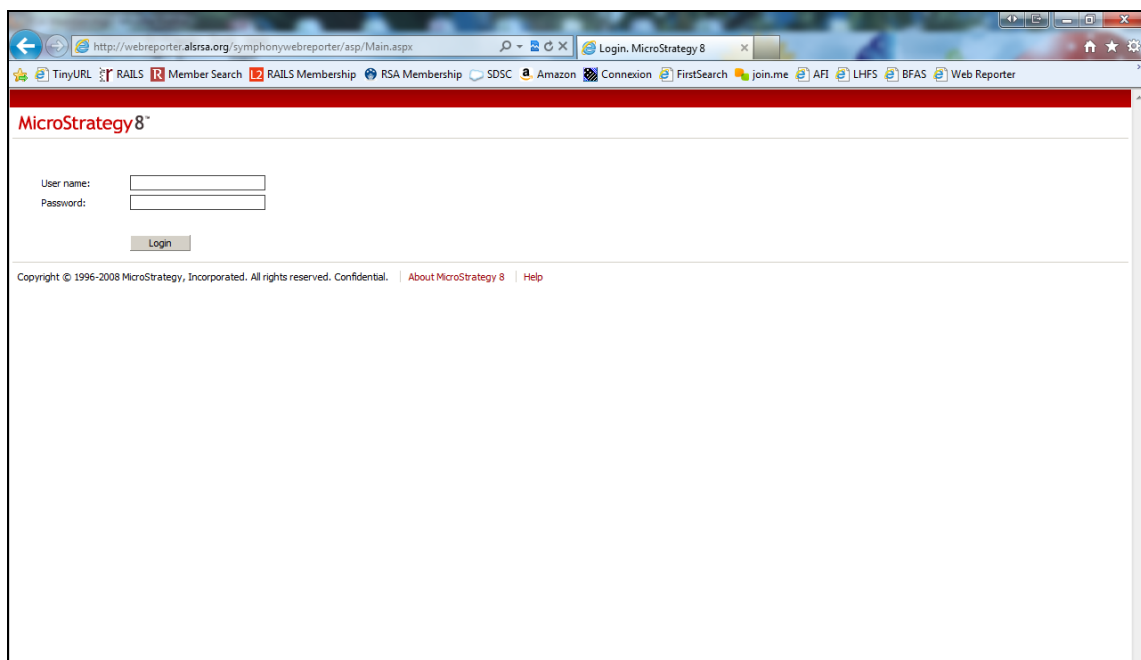
Your user name is your library's WorkFlows code *without* the CIRC, TECH, or SUPER extension.
For example, the Web Reporter user name for the Resource Sharing Alliance collection is: AG_ALS-PDC

Your Web Reporter password is the following and it is case sensitive: WebReport

If you work at one of the "Big 12" RSA libraries[1], your password (also case sensitive) is the following: ReportPro

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[1] RSA "Big 12" libraries include **Alpha Park** Public Library District, **Fondulac** Public Library District, **Galesburg** Public Library, **Illinois Prairie** District Public Library, **Kewanee** Public Library District, **Jacksonville** Public Library, **Morton** Public Library District, **Normal** Public Library, **Pekin** Public Library, **Peoria** Public Library, **Warren County** Public Library District, and **Washington** District Library.

3. Once you are logged into Web Reporter, click on the WRSymphony34 project:
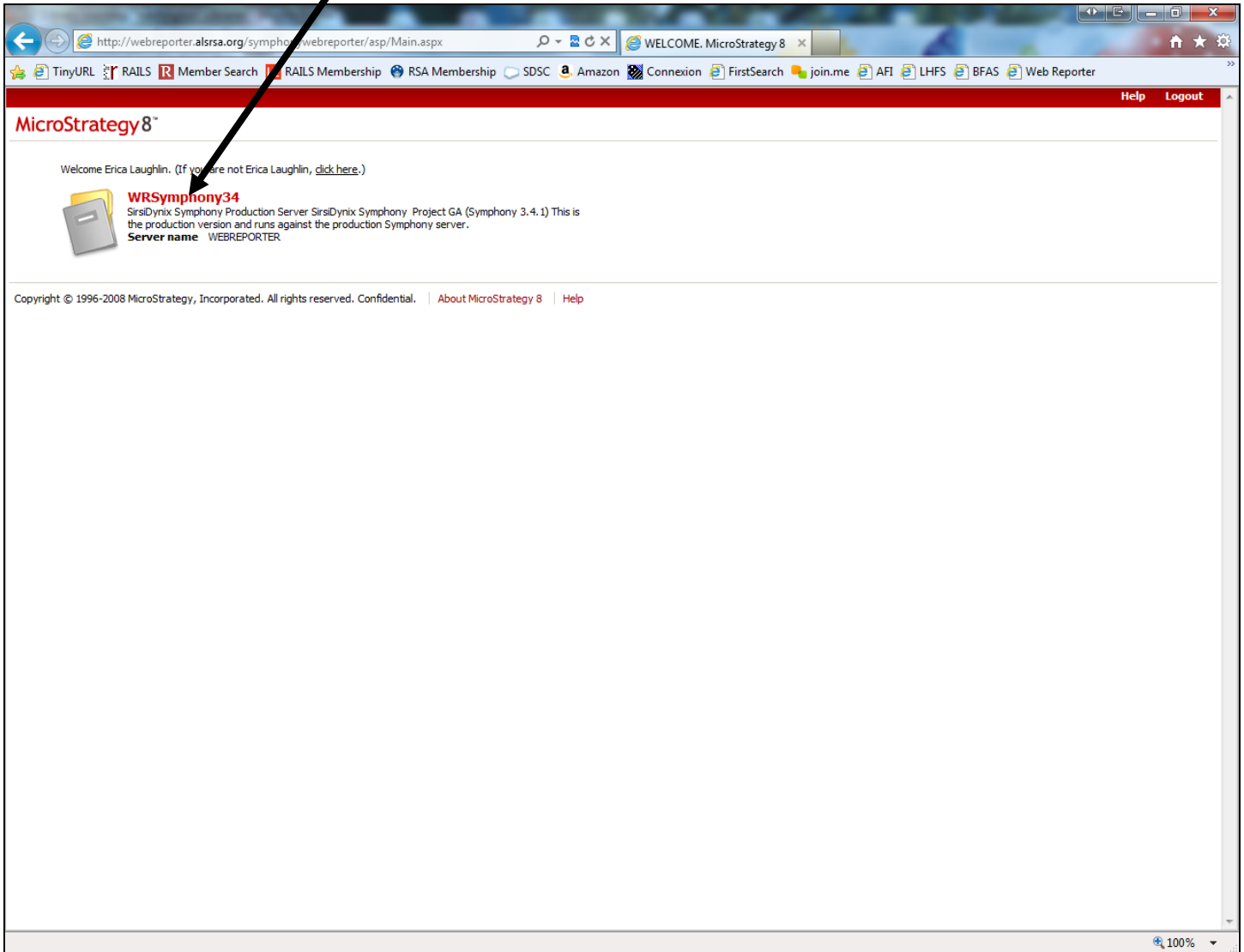
4. Click on the "Shared Reports" folder or the "Shared Reports" link on the red toolbar:
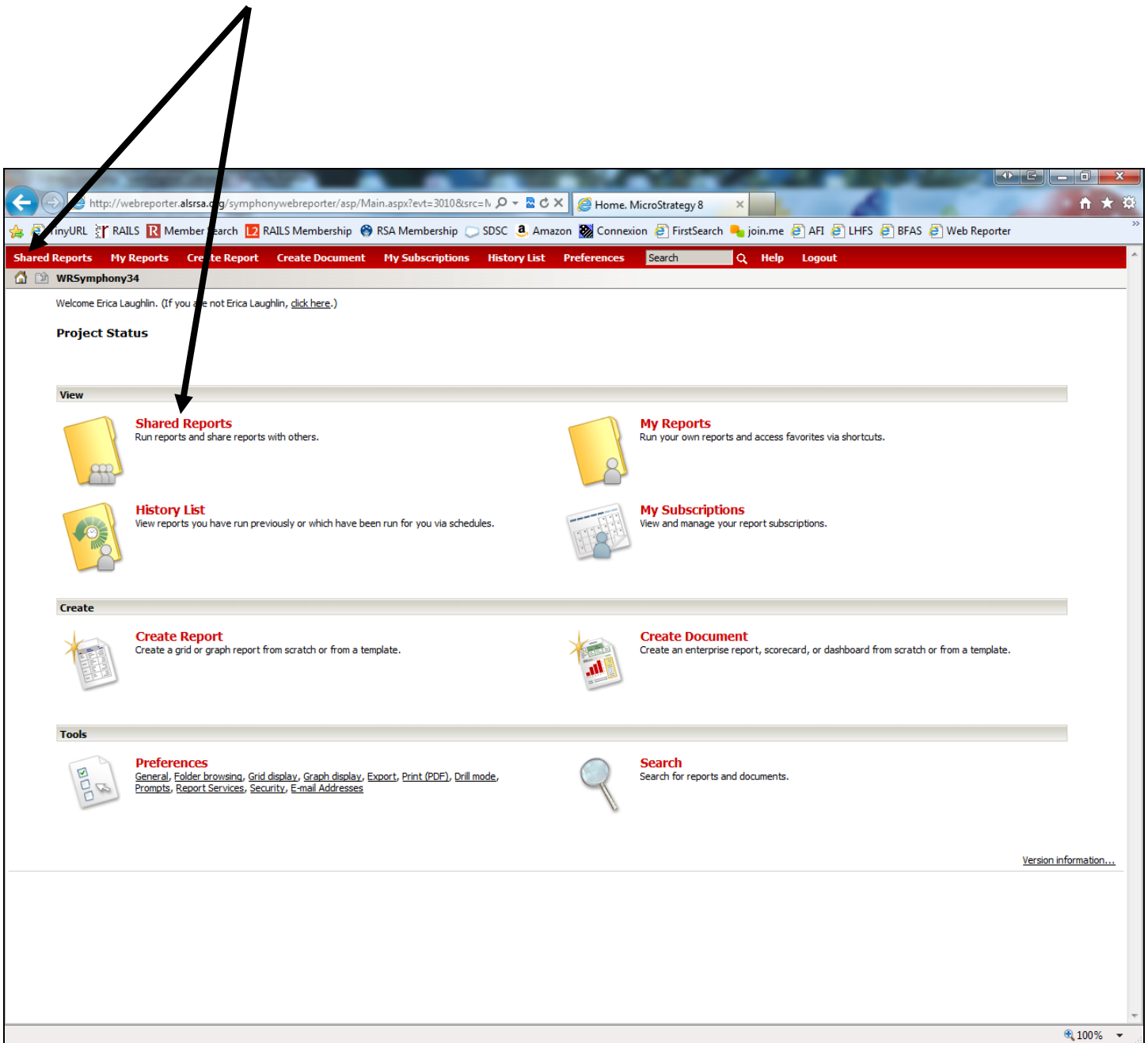
A list of the subfolders saved in the Shared Reports folder will appear:
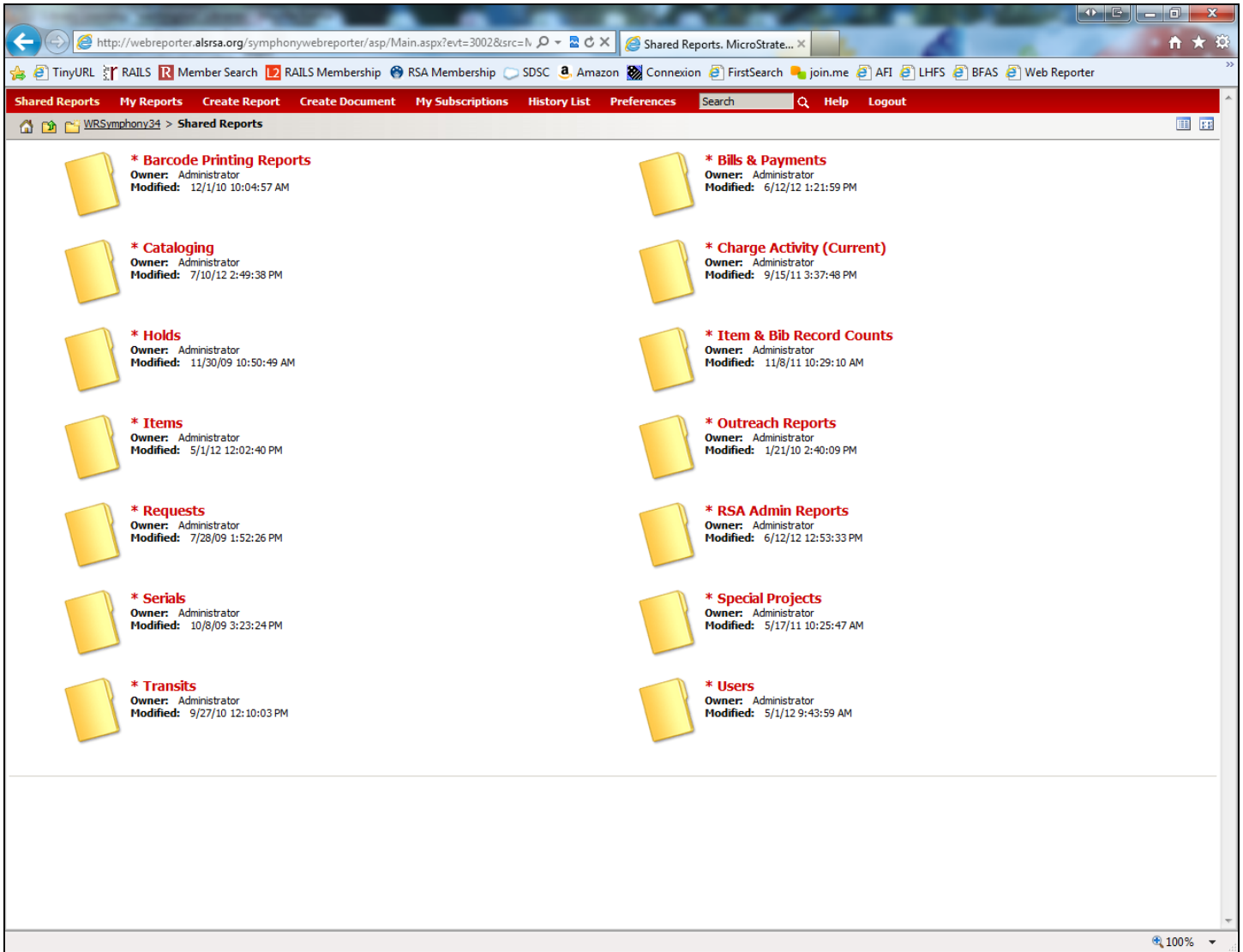
5. The Item List Builder report is helpful to use when identifying sections of your collection that need to be edited in batch. The Item List Builder report is saved in the Cataloging subfolder:

You may use Web Reporter reports other than the Item List Builder to generate lists of items you need to modify in the item group editor. These reports will likely be found in the Cataloging or Items subfolders in the Shared Reports folder.

If you need assistance running a report, or would like RSA staff to run the report for you, please contact the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083.

After you run the report, select the "Export" option from the File menu at the top of the report:

If you click the File menu and it does not open, turn on "compatibility view" in Internet Explorer so that it displays Web Reporter correctly.

To enable compatibility view, try one of the following workarounds:

- Click the broken piece of paper icon that appears to the right of the Web Reporter URL:
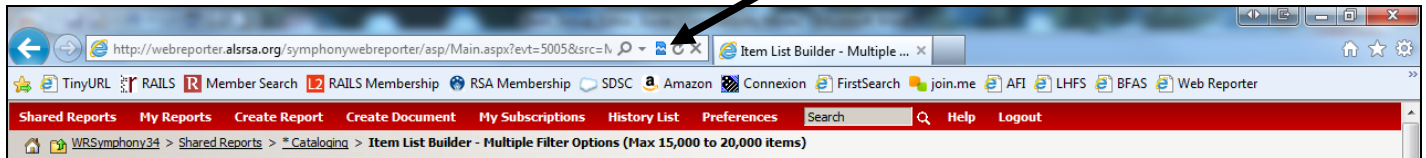
- If the broken piece of paper icon does not appear to the right of the Web Reporter URL, enable comptability view by doing the following:
    - Click on the gears icon in the upper right corner of Internet Explorer.
    - Select "Compatbility View Settings."
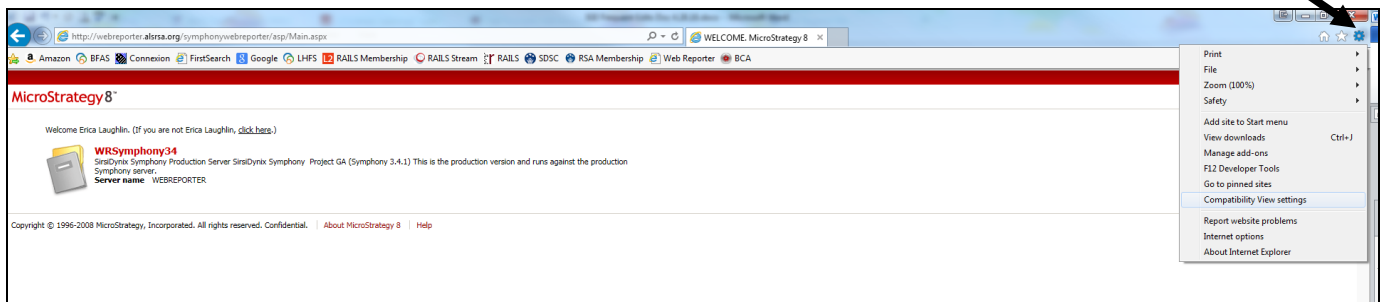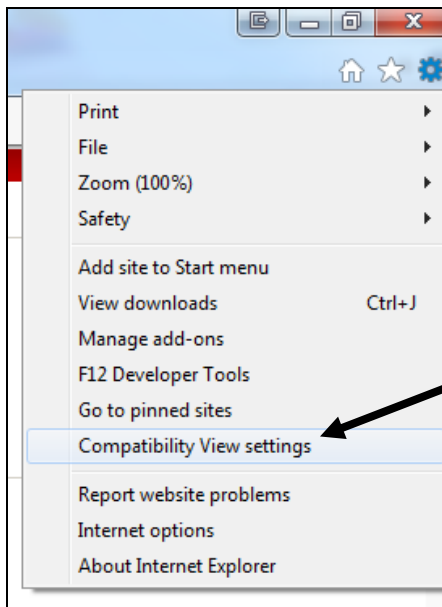
○ When the compatiblity view settings box opens, alsrsa.org should automatically appear in the "Add this web site" field.

Click "Add."
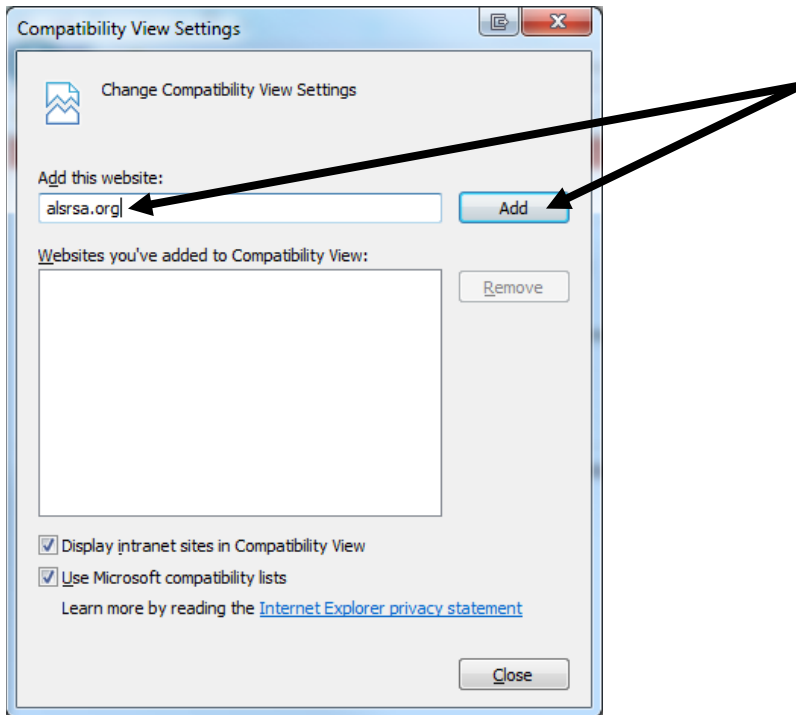
○ After you click "Add," alsrsa.org should now appear in the field that lists websites added to compatibility view.
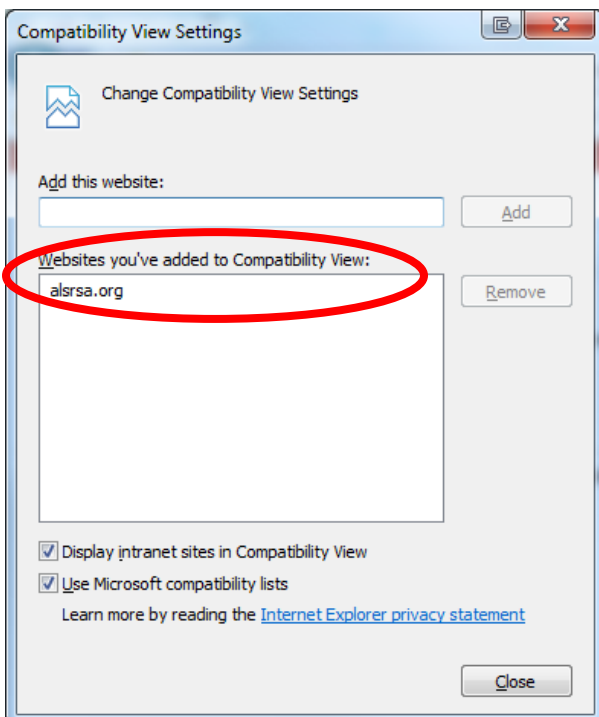
○ Click "Close" to shut the compatability view settings box.

After you enable compatibility view using either the broken piece of paper icon or the gears menu, Web Reporter may display a message that it is processing the request. The processing message may appear for several seconds. Your screen should then auotomatically refresh once compatiblity view is turned on.

After enabling compatibility view, you should then be able to access the File menu. Select the "Export" option.

6. From the export options page, select the "Excel with plain text" option.
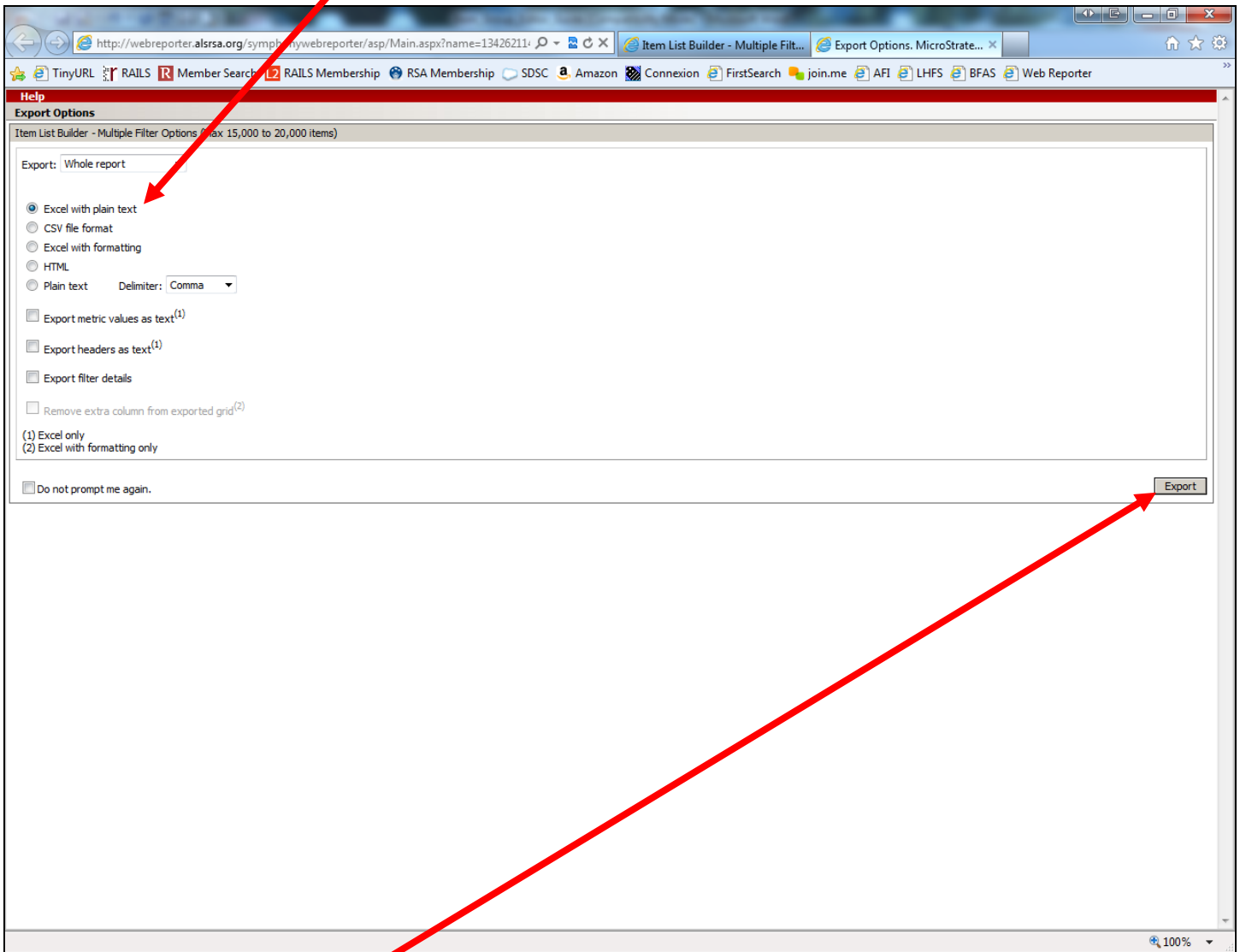
7. Click the Export button.

8. As the report opens in Excel, you may see a message similar to that shown below, asking you to confirm you want to open the report:
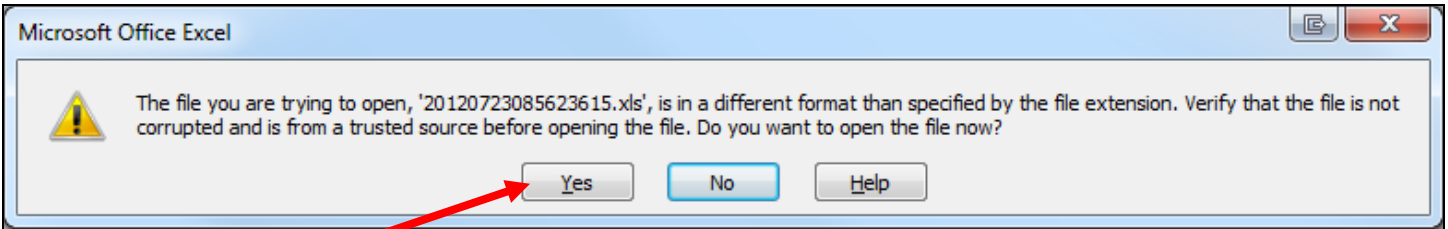
Click Yes.

9. *Optional step:* Once the report opens in Excel, you can re-sort the data on the report by a particular column (e.g., Item Created Date, Item ID, Item Total Charges, etc.).

➢ If you do not want to re-sort the report, please go to step 10 on page 49.

a. Delete the first two lines of the report that contain the name of the report and a blank line. To delete both lines, click on line number 1 and drag your cursor down to line number 2. Both lines will appear highlighted in blue:
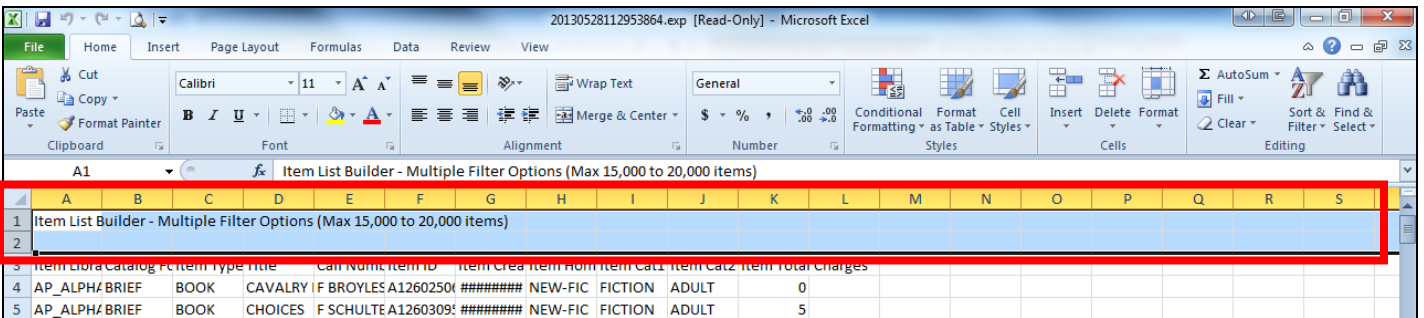
b. To delete lines 1 and 2, right click anywhere on the highlighted lines. Select "Delete" from the menu:
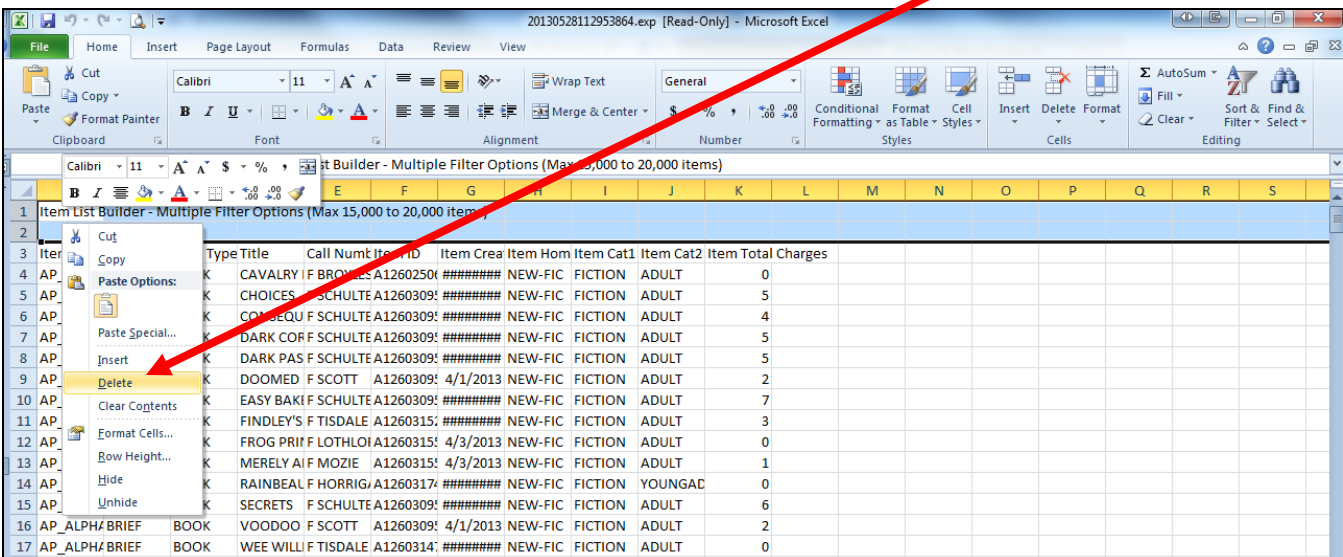
c. To select the entire spreadsheet for re-sorting, click the triangle box in the upper left corner of the spreadsheet:
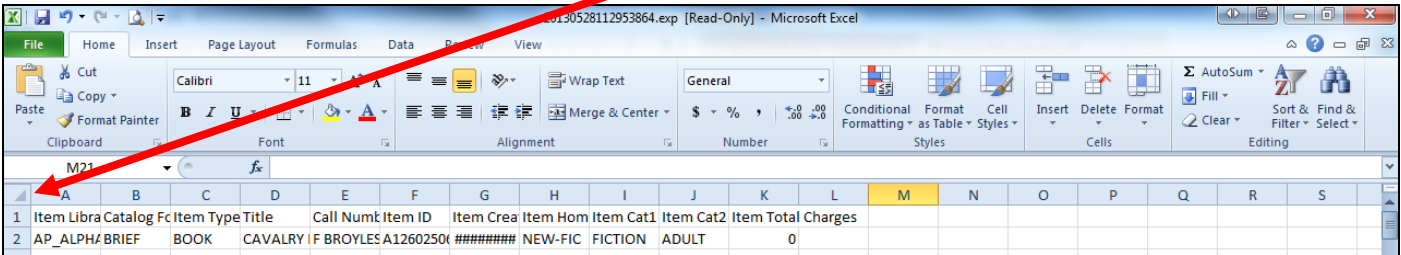
Once you click the triangle button, the entire spreadsheet will appear highlighted in blue, as shown below. Selecting the entire spreadsheet is important so that any sorting change will affect the entire report.
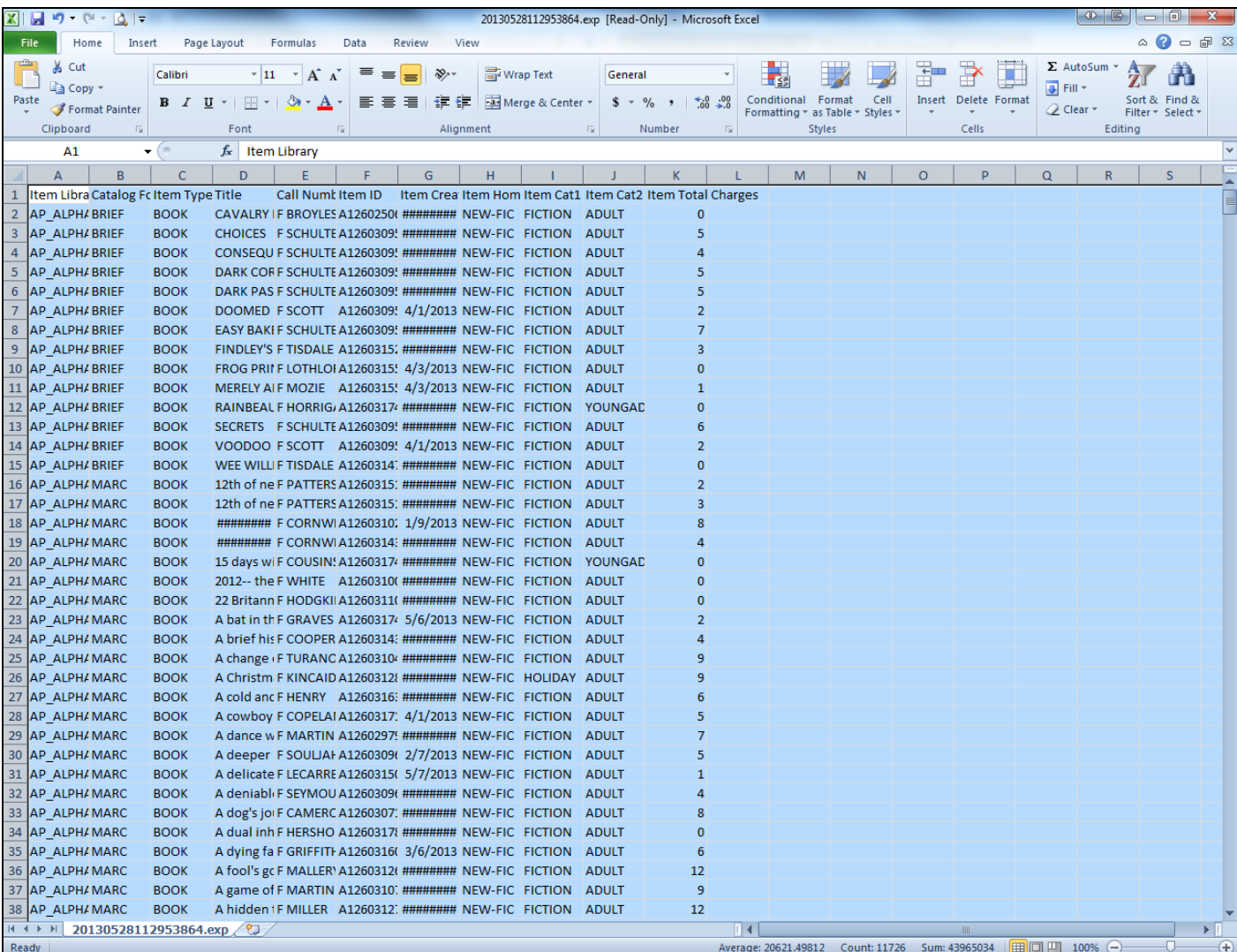
d. From the Home tab, click on the Sort & Filter icon and select "Custom Sort":
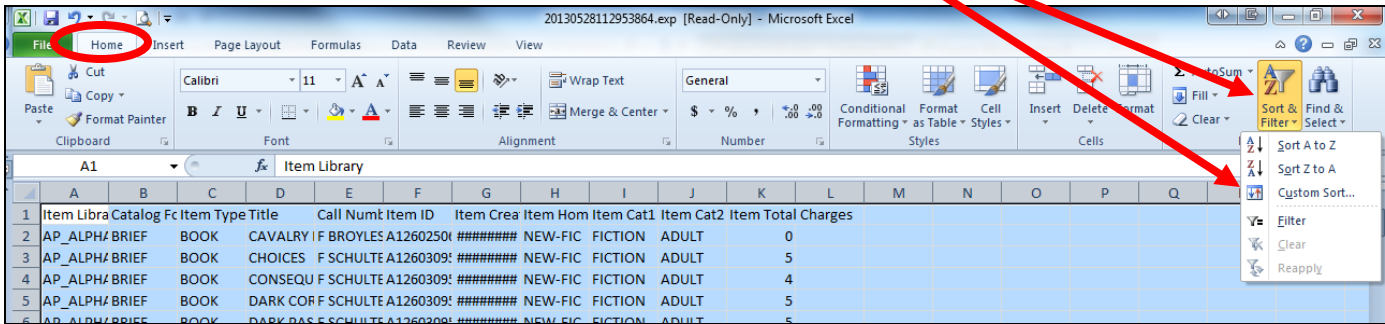
e. A sort pop-up box appears:
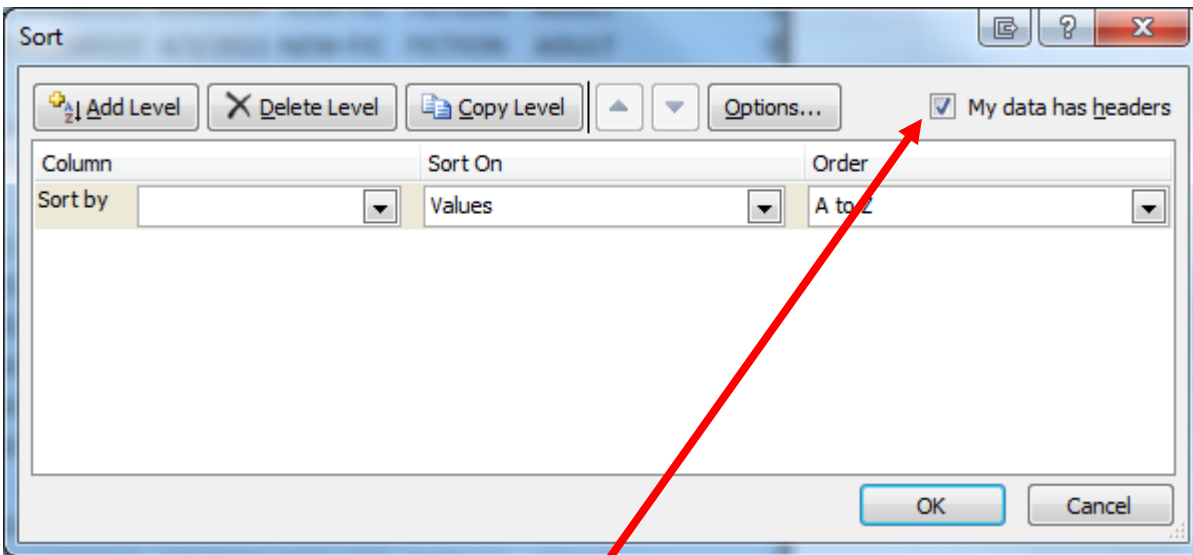
Make sure the check box is selected next to "My data has headers." This setting tells Excel the report has column headers in the first row, which should not be sorted into the other data on the report.

f. Click on the "Sort by" menu and select the column by which you want to re-sort the report (e.g., Item Created Date).

The options in the "Sort by" menu may differ on your screen, depending on the columns that appear on your report.
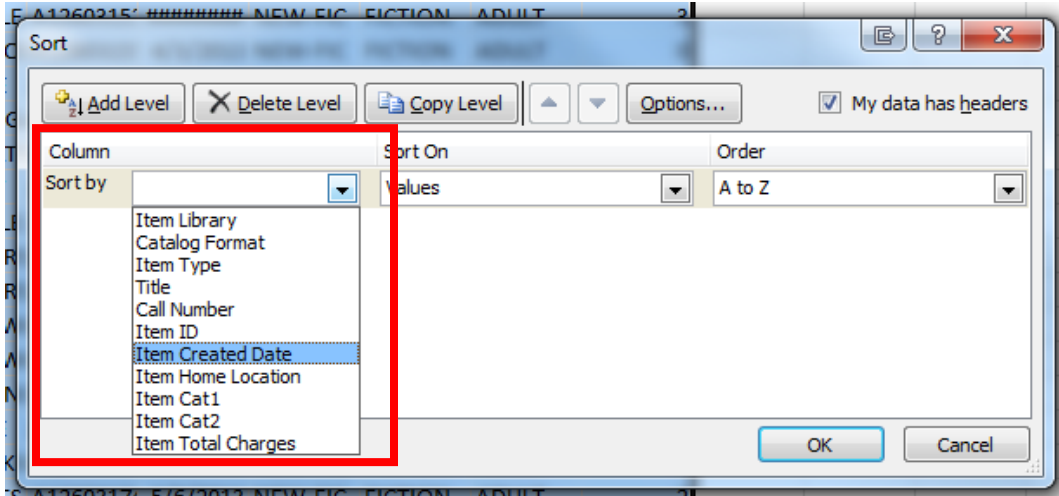
Notice for Item Created Date, you can use the "Order" menu to select "Oldest to Newest" or "Newest to Oldest:"
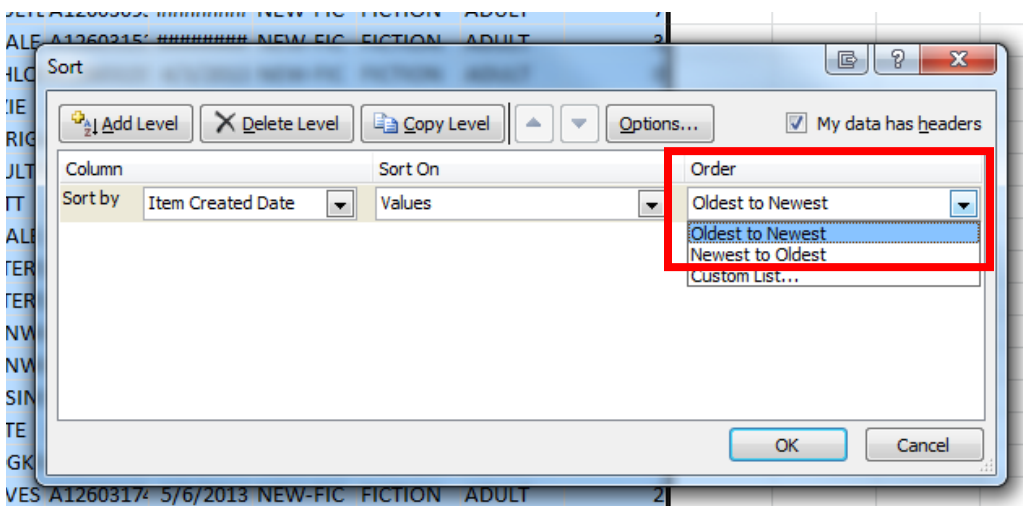
g. Once you select the column by which to sort and the order (if applicable), click OK.

h. The data on the entire report will be re-sorted by the column you selected.

10. **_Required step:_** Remove **all** of data on the report **except** for item ID.

When the report is uploaded into the item group editor wizard, the report may contain **only** the item IDs of the items to modify. The report cannot contain any other information--title, library, item type, etc.

Each item ID **_must_** appear on a separate line on the report. If more than one item ID appears on a line, WorkFlows will be unable to recognize the item IDs when you upload the report into the item group editor wizard.

To delete a column, put your cursor over the column and right click. Select "Delete" from the menu.
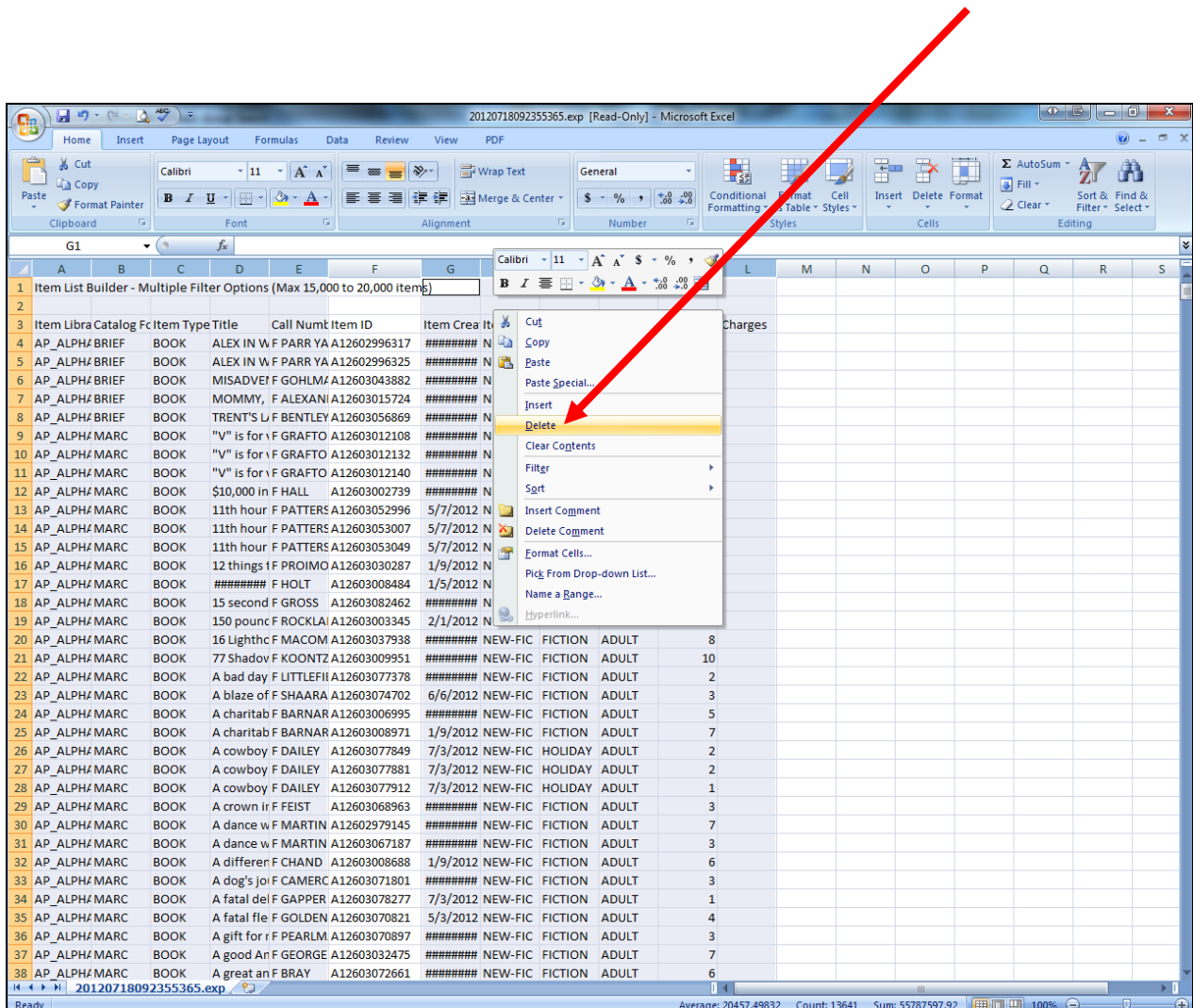
11. Be sure to delete the row on the spreadsheet that contains the "Item ID" column heading.

    To delete it, click on the top row that begins with "Item ID."

    Right click with your cursor and select "Delete" from the menu.
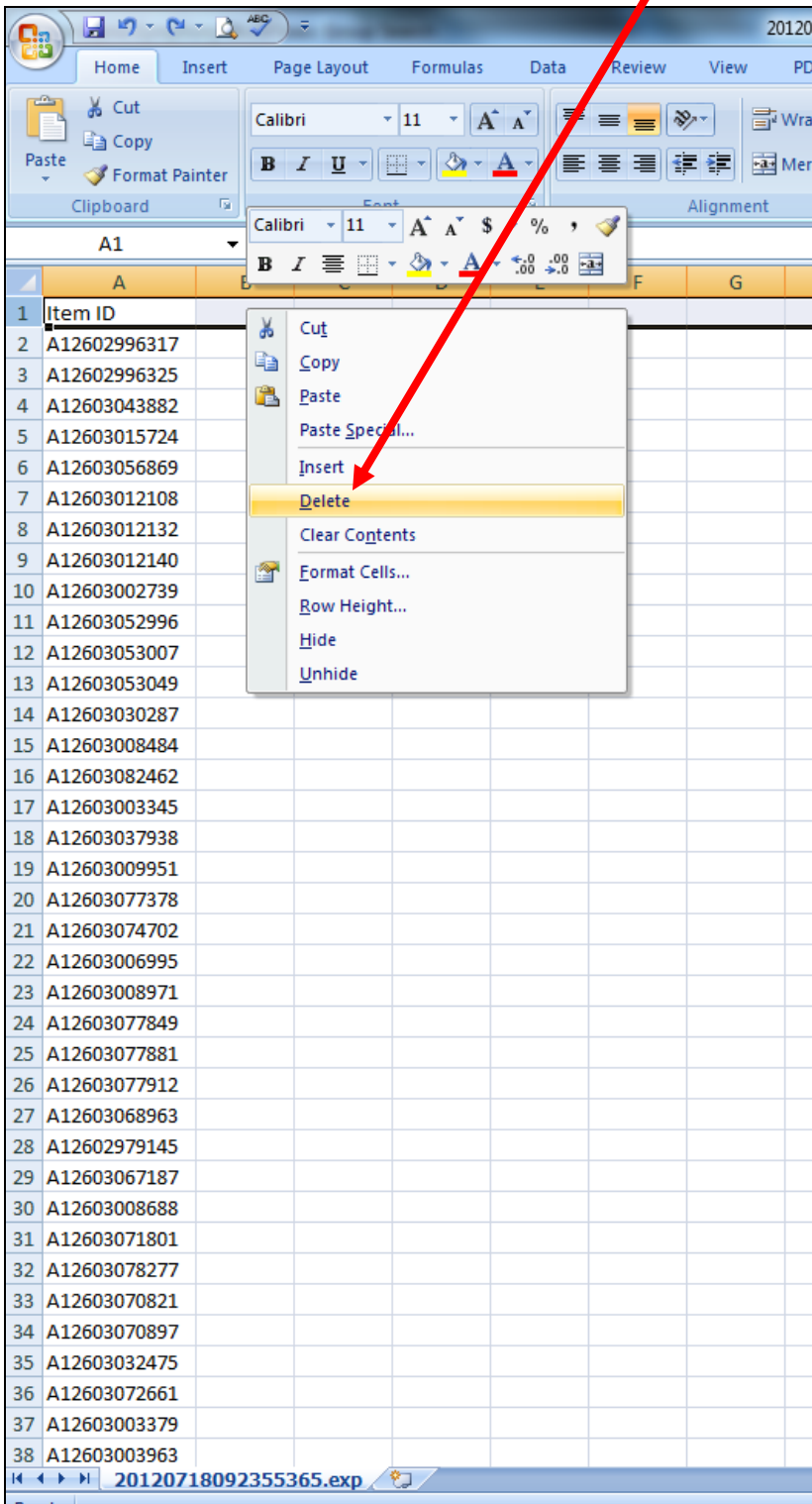
12. Scroll to the bottom of the report of item IDs. Check the number that appears to the left of the last item ID in the list (circled below):

Remember:

- RSA asks that you limit files of item IDs to upload into the item group editor to ***no more than 5,000 items per day.***

- If the line number that appears next to the last item ID in your report is greater than 5,000, you may upload item IDs 1-5,000 into the item group editor wizard. The remaining 1,000-increments of item IDs should be saved as separate files to be uploaded into WorkFlows on *different* days. **For instructions how to create a smaller file of item IDs to upload into the WorkFlows item group editor, please see the Appendix of this document.**

- Smaller files of 100 to 200 items will upload more quickly into the item group editor than a file of 5,000 items.

- If you want to highlight multiple item IDs in the report to paste into a separate spreadsheet, for example, simultaneously press the Shift key and the arrow down key on your keyboard.

13. After all of the content except for the item IDs have been removed, and there are no more than 5,000 items listed, save the spreadsheet using the "text (tab delimited)" option in Excel.

   To ensure a successful upload into the item group editor wizard, your report of item IDs *must* be saved in this text file format.

   On the "Save As" box in Excel, click on the drop-down menu for "Save as type."

   Select "Text (Tab delimited)."
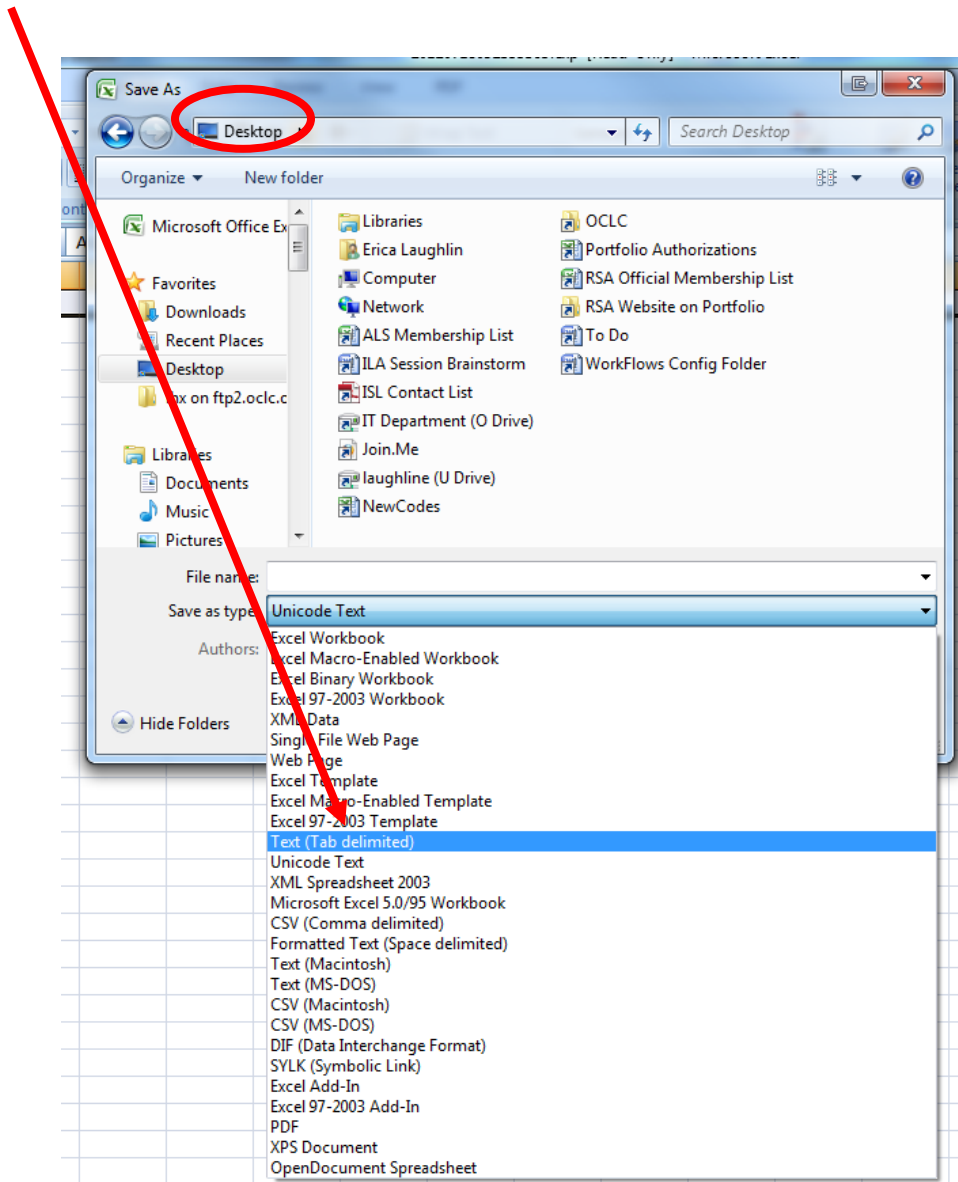
14. Select a location on your computer to save the file of item IDs.

   RSA recommends saving the file in an easy-to-find location on your computer, such as the desktop (circled above), a network drive, or a flash drive.

15. RSA suggests you name the file of item IDs using these guidelines:
    - Begin with the first two letters of your library's WorkFlows code (e.g., AY for Ayer Public Library District).
    - The value (item type, home location, item category, etc.) currently assigned to the list of item IDs, which will help you identify the item IDs contained in the file (e.g., DVDs).
    - Enter today's date so you can easily determine from the file name when that file was created (e.g., 9.11.12).
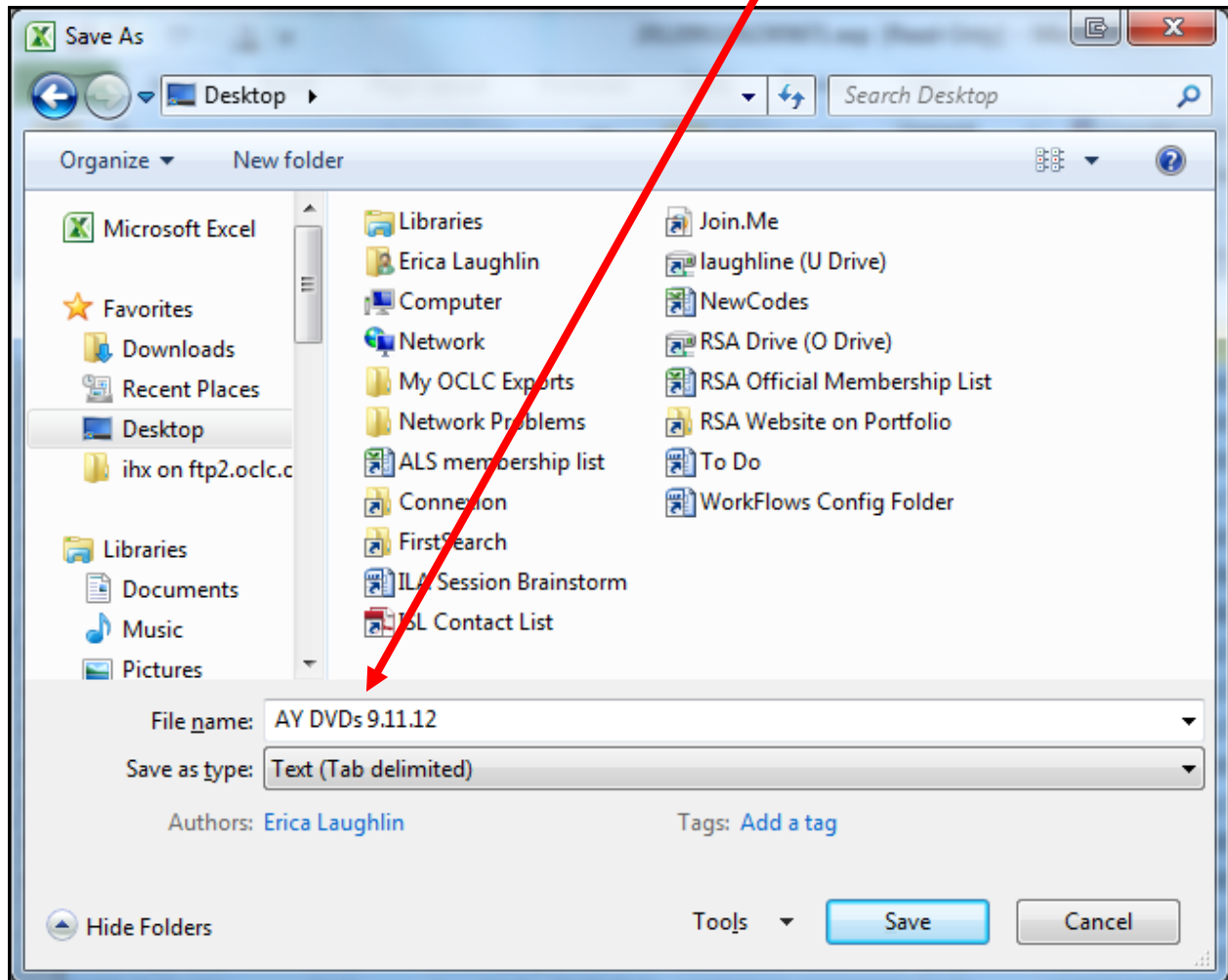
Uploading a List of Item IDs

After you create the file of item IDs, you are ready to upload the file into the item group editor wizard. The item group editor will search WorkFlows and retrieve the item IDs listed in your file.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The advanced search screen opens. Click the Upload Item IDs helper button:
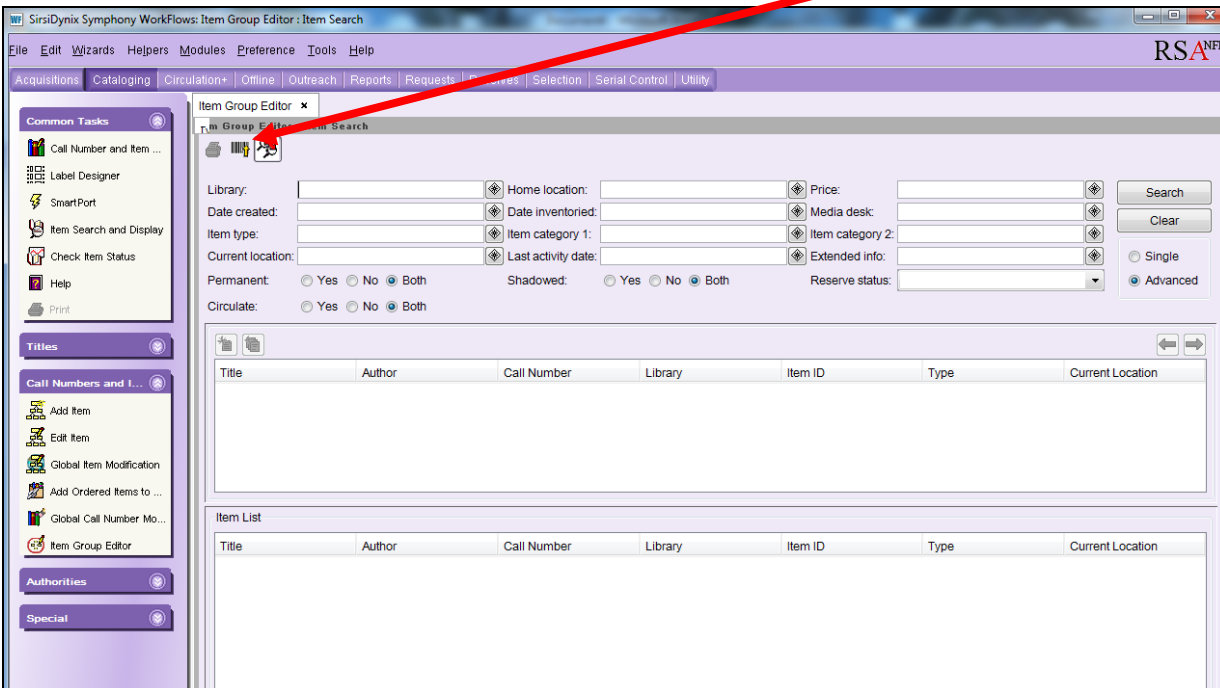
A pop-up box appears for you to upload the file of item IDs:
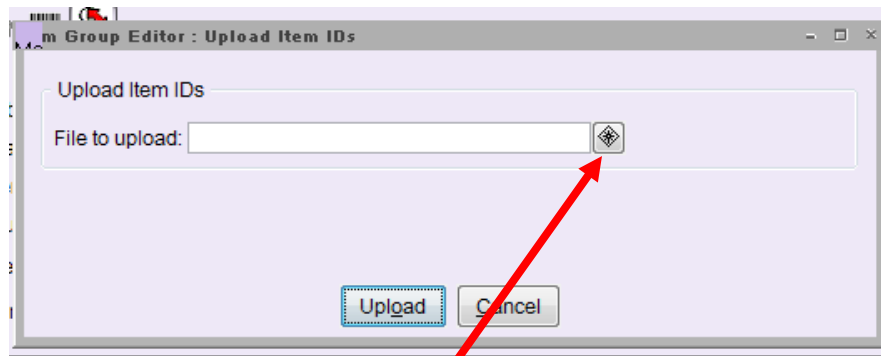
7. Click the gadget button next to the "File to upload" box.

8. A "Select File" box opens.

    Click the "Save in:" menu at the top of the box to find where you saved the file of item IDs on your computer.

    Remember: RSA recommends saving files to your computer's desktop, a flash drive, or a network drive so you can easily find the file to upload into the item group editor.
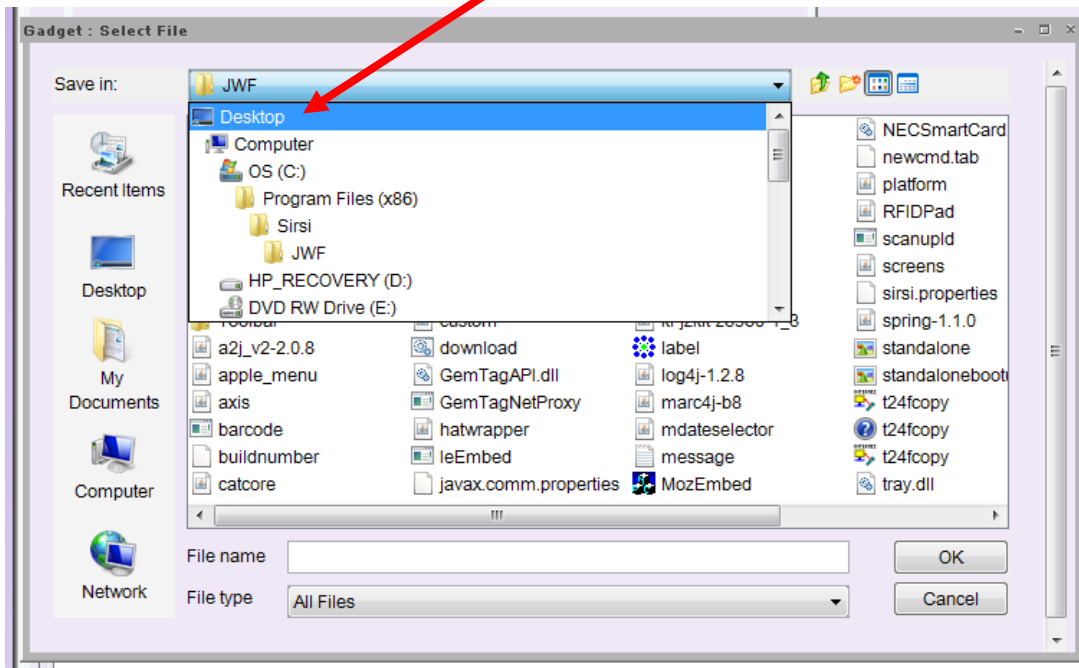
9. From the list of files, click on the file you want to upload so that it is highlighted in blue.

The name of your file should then appear in the "File name" box.
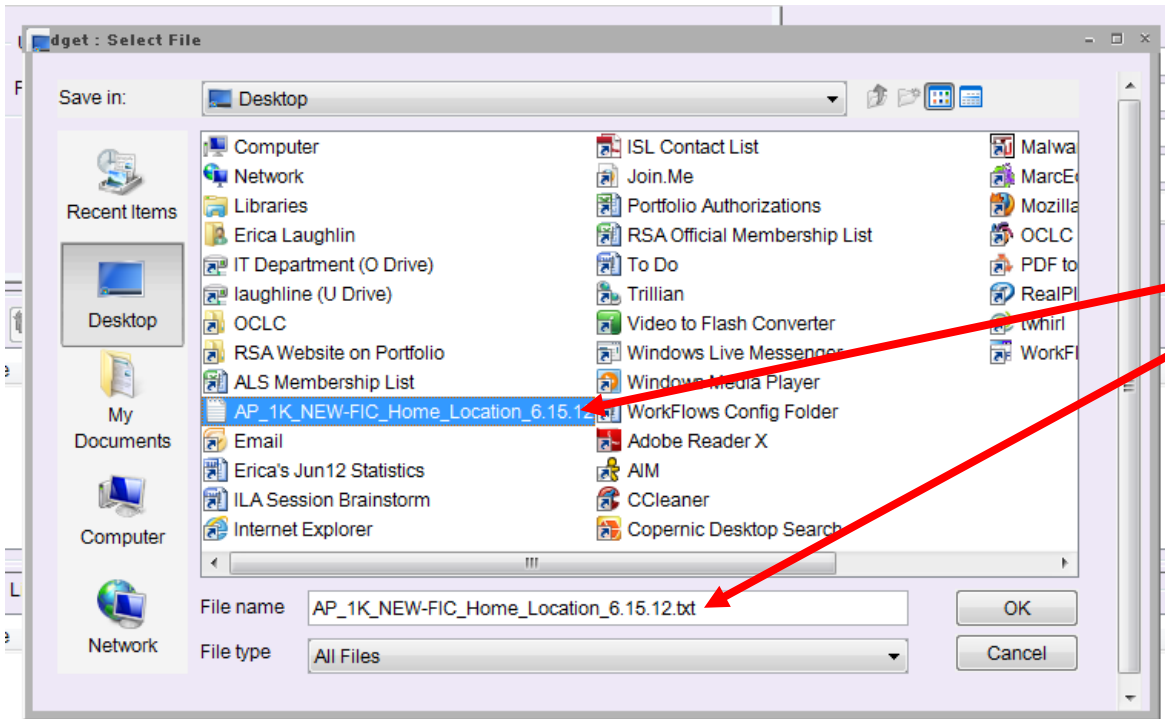
10. Click OK to close the "Select File" box.

The file name should now appear in the "File to upload" box in the item group editor:
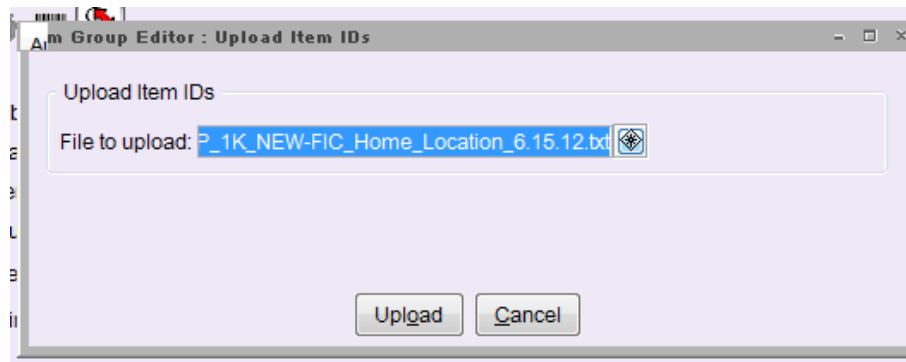
(Your file name will vary from that shown above.)

11. Click the Upload button.

During the upload, WorkFlows uses the item IDs listed in your file to retrieve the items from the database.

Depending on the number of item IDs in your file, WorkFlows may take several minutes to retrieve the items.

If any of the item IDs in the file were not found in WorkFlows, an error pop-up box appears that lists those item IDs that were not found.

Items that display the "not found in catalog" message were likely deleted from WorkFlows between the time you ran the report of item IDs and uploaded it into the item group editor wizard.

WF Item Group Editor : Error

1000 item(s) to upload.
44 item(s) uploaded.
A12602996317 - Item not found in catalog
A12602996325 - Item not found in catalog
A12602997460 - Item not found in catalog
A12603015724 - Item not found in catalog
A12603056869 - Item not found in catalog
A12603012093 - Item not found in catalog
A12603012108 - Item not found in catalog
A12603012132 - Item not found in catalog
A12603012140 - Item not found in catalog
A12603012182 - Item not found in catalog
A12603002739 - Item not found in catalog
A12603052996 - Item not found in catalog
A12603053007 - Item not found in catalog
A12603053049 - Item not found in catalog
A12603030287 - Item not found in catalog
A12603008484 - Item not found in catalog
A12603003345 - Item not found in catalog
A12603037938 - Item not found in catalog
A12603009951 - Item not found in catalog
A12603009969 - Item not found in catalog
A12603074702 - Item not found in catalog
A12603024367 - Item not found in catalog
A12603006995 - Item not found in catalog
A12603008971 - Item not found in catalog
A12603021490 - Item not found in catalog
A12603024503 - Item not found in catalog
A12603068963 - Item not found in catalog
A12602979145 - Item not found in catalog
A12603067187 - Item not found in catalog
A12603009016 - Item not found in catalog
A12603008688 - Item not found in catalog

12. Click the red X in the upper right corner to close the error box.

The items from your file that WorkFlows was able to find during the upload have been added to the item list:

Considerations when uploading files:

- The item group editor will display any items in the result list that are not owned by your library, if those items were included in your uploaded file. Although these other libraries' items can appear in the result list, you cannot add the other libraries' items to the item list. You may only edit items cataloged by your library.

- Item IDs that are uploaded into the item group editor will replace any items that already appear in the item list. If you want to add the uploaded items to a list of items that already appear in the item group editor's item list, RSA recommends uploading the file of item IDs first. Then you can use the item group editor to search for the additional items and add them to the list of uploaded items.

    Remember: Your library should edit no more than 5,000 items per day in the item group editor wizard.

Printing Items in the Item List

You can print a list of the items that appear in the item group editor's item list. The following fields can print for each item:

- Title
- Author*
- Call number
- Library
- Item ID
- Copy number*
- Type
- Current location
- Circulate flag*

The asterisked (*) fields—author, copy number, and the circulate flag—display only when they have been selected in the properties for the item group editor wizard. The author field should be configured to display in the item list if you adjusted the item group editor wizard to use the properties discussed earlier in this guide.

To adjust the item list display properties for printing:

If you also want the copy number or circulate flag to display in the item list and appear when you print the list, check the boxes next to "Display copy number" and/or "Display circulate flag" in the item group editor's properties box. (You can be logged into WorkFlows using your library's TECH login when you adjust the item list display properties.) Click the OK button on the properties box to save your selections.
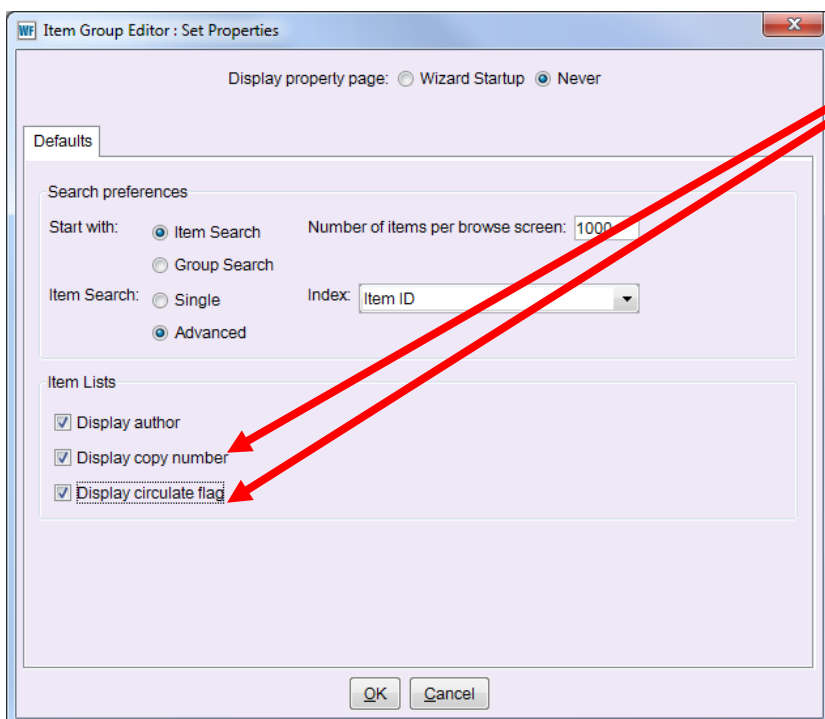
To print items in the item list:

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard. Enter the override password provided to you during item group editor training, and click OK.
6. The advanced search screen opens. Search for the items you want to print, or upload a file of item IDs.
7. If you entered a search for the items, click the "Add selected" or "Add all" helper button to add the items you want to print to the item list.

--or--

If you uploaded a file of item IDs, those items should automatically appear in the item list.

Remember: No more than 5,000 items should be uploaded or added to the item list at one time.

8. Once the items appear in the item list, click the Print Items helper button in the upper left corner:

The Print Items helper button will be grayed out, and you will not be able to click on it until you add at least one item to the item list.

A Print Preview window opens:

The arrow buttons at the top of the Print Preview window help you navigate through the document page by page. The arrows followed by the vertical line allow you to navigate quickly to the first or last page of the document.
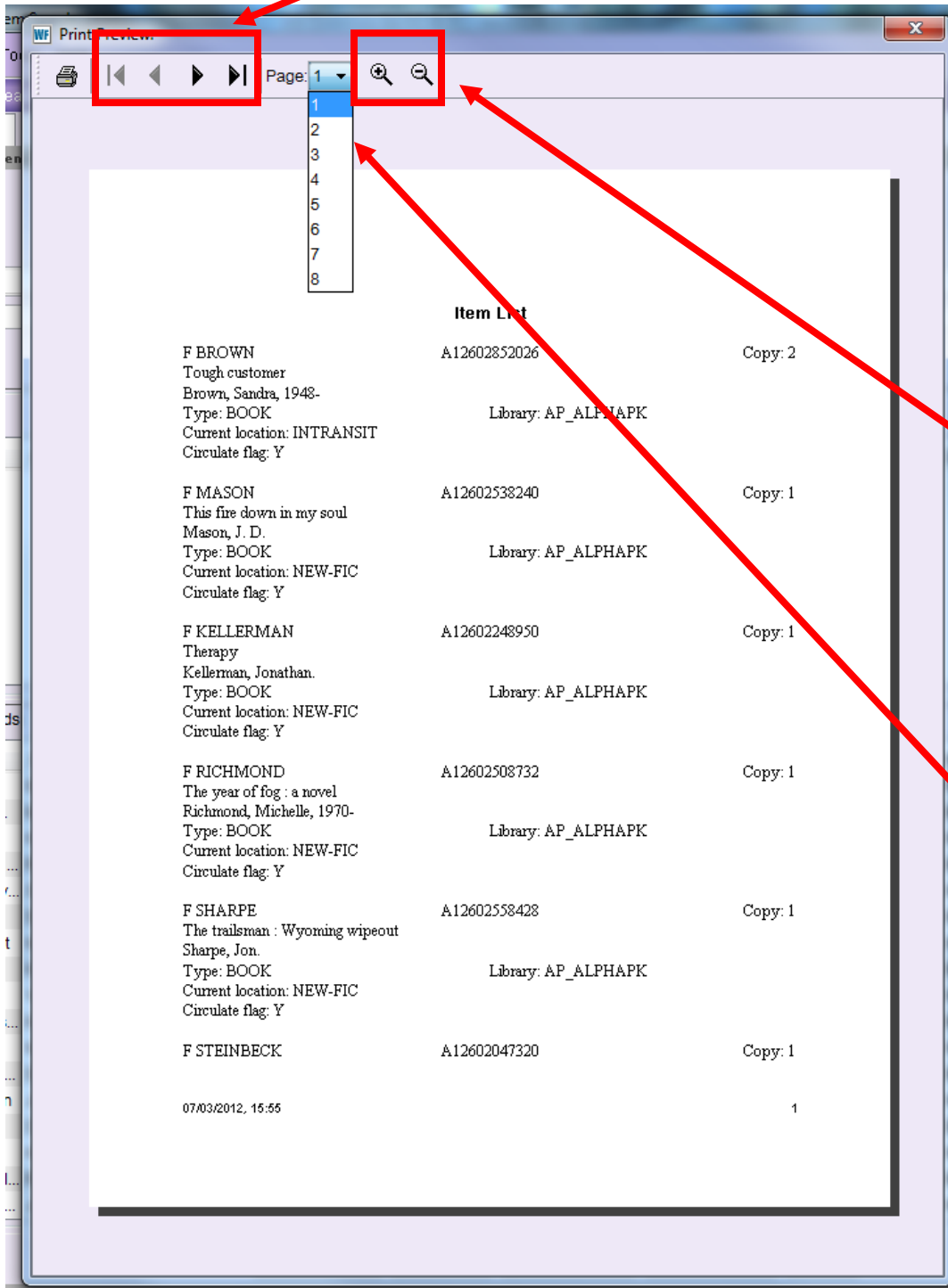
The magnifying glass buttons allow you to zoom your view of the document in and out.

The page drop-down menu lets you quickly navigate to a specific page in a multi-page document.

Print Preview

Page: 1

1
2
3
4
5
6
7
8

Item List

F BROWN	A12602852026	Copy: 2
Tough customer		
Brown, Sandra, 1948-		
Type: BOOK	Library: AP_ALPHAPK	
Current location: INTRANSIT		
Circulate flag: Y		

F MASON | A12602538240 | Copy: 1
This fire down in my soul
Mason, J. D.
Type: BOOK   Library: AP_ALPHAPK
Current location: NEW-FIC
Circulate flag: Y

F KELLERMAN | A12602248950 | Copy: 1
Therapy
Kellerman, Jonathan.
Type: BOOK   Library: AP_ALPHAPK
Current location: NEW-FIC
Circulate flag: Y

F RICHMOND | A12602508732 | Copy: 1
The year of fog : a novel
Richmond, Michelle, 1970-
Type: BOOK   Library: AP_ALPHAPK
Current location: NEW-FIC
Circulate flag: Y

F SHARPE | A12602558428 | Copy: 1
The trailsman : Wyoming wipeout
Sharpe, Jon.
Type: BOOK   Library: AP_ALPHAPK
Current location: NEW-FIC
Circulate flag: Y

F STEINBECK | A12602047320 | Copy: 1

07/03/2012, 15:55   1

9. When you are ready to print the list of items, click the Printer button at the top of the Print Preview window:
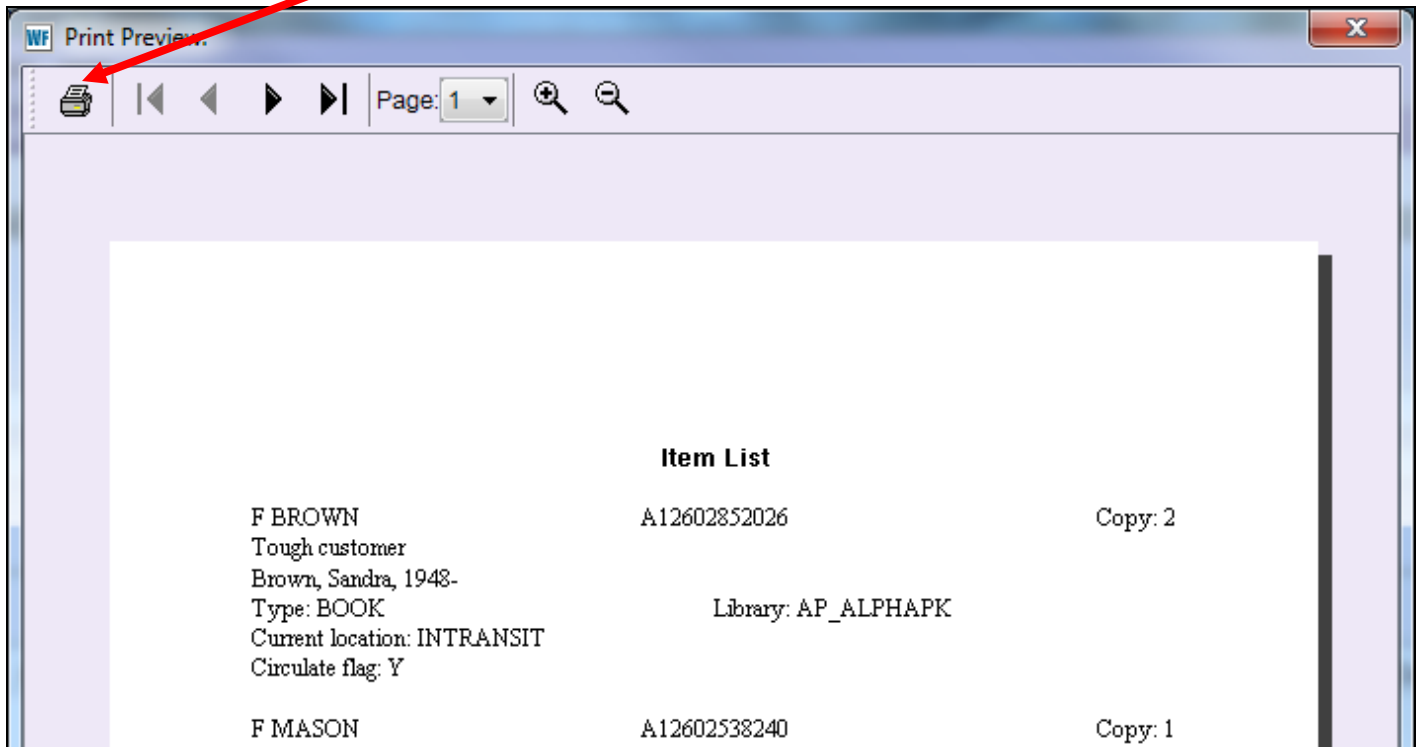
10. A Print box should open. Select the appropriate printer and any properties, such as double-sided, collated, stapled, etc.

Click the OK button to send the document to the printer.

Below is a screen shot of the Print box for the printer at the RAILS East Peoria Service Center. The name of the printer in your print box will be different from that pictured below.
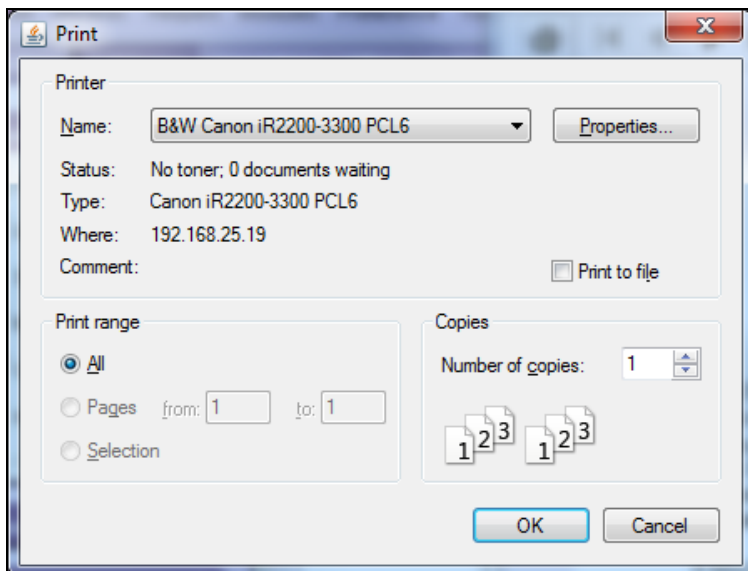
Editing an Unsaved Item List

The item group editor wizard allows you to easily change in batch a single value, or a combination of values, that are assigned to multiple items in your collection. This section will discuss how to edit values for a list of items that you have not saved as a group in the item group editor wizard.

RSA recommends only making changes to items that are not saved as a group if you will not need to restore the edited items to their original values at some point. If you will eventually need to restore the original values of the items in the list (for example, a collection that will be assigned to the DISPLAY home location code will eventually return to its original home location of FICTION), RSA recommends first saving that item list as a group in the item group editor. Doing so will allow those items to be more easily restored to their original values at a later date. Groups will be discussed in more detail later in this guide.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, 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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The item group editor's advanced search screen opens. Search for the items you want to modify. You can select a single value to search, or you can select multiple values for your search. You also have the option to upload a file of item IDs.

7. Add the items to be modified to the item list using the "Add all" or "Add selected" helper buttons.

Remember:
You can search for items cataloged by other libraries in the item group editor wizard. However, WorkFlows will not allow you to add other libraries' items to the item list. If you click either the "Add selected" or the "Add all" helper button to try to add items not created by your library to the item list, WorkFlows will simply not add the items. No error message will appear.

8. Once the items to be modified have been added to the item list, click the "Edit Items" button at the bottom of the screen:

The Edit Items box will open:

9. Select the values you want to modify for *all* of the items in the item list. You can select a single value, or a combination of values, to modify at one time.

    Under "Item information" in the edit items box, use the drop-down menus to select the values that the item group editor should assign to all of the items in the item list. See the next page for a chart that lists the item values that can be modified in the item group editor.

    Under "Extended information" in the edit items box, you can type the text that should be assigned to all of the items as a circ, public, or staff note. You can create a new note, add the note to the end of the existing note ("append"), or replace the existing note with a new note. You cannot erase an existing note by leaving the note's text field blank and selecting the "New" or "Replace" option.

    Remember:
    The item values you select and the extended information text you enter into the edit items box will be applied to *all* of the items in the item list.

The chart on the next page lists each item value, as well as a short description of that value, that can be modified using the item group editor wizard.

Item Value	Description
Copy number	WorkFlows automatically assigns sequential copy numbers when you catalog more than one item that is attached to the same call number on a bibliographic record. To enter a value for copy number in the edit items box, select the blank option from the drop-down menu. Type the copy number that should be assigned to all of the items in the item list.
Type	The code assigned to the item that indicates its format (BOOK, NEW-BOOK, DVD, MAGAZINE, etc.). The item type determines circulation and hold rules.
Item library	The WorkFlows code of the library that cataloged the items. The value for item library will remain "Will not be modified." You may only modify items owned by your library and its branches (if applicable) in the item group editor.
Home location	The code that indicates where the item is shelved in your library (FICTION, NONFICTION, STACKS, etc.).
Current location	The code that indicates where the system "thinks" the item is located (checked out, in-transit, holds, etc.). ***This value cannot be modified in the item group editor.***
Item cat 1	The item category 1 code indicates if the item's content is fiction or nonfiction. Select the EQUIPMENT item cat 1 for any items that do not have fiction or nonfiction content. Each item cataloged in WorkFlows must be assigned an item cat 1. The UNDEFINED value should never be assigned to item cat 1.
Item cat 2	The item category 2 code is assigned to the item to indicate its reading, viewing, or listening level. Select the EQUIPMENT item cat 2 for any items that do not have a reading, viewing, or listening level. Each item cataloged in WorkFlows must be assigned an item cat 2. The UNDEFINED value should never be assigned to item cat 2.
Item cat 3	The item category 3 code indicates the item's general format. The item cat 3 code assigned to an item depends on its item type. Each item cataloged in WorkFlows must be assigned an item cat 3. The UNDEFINED value should never be assigned to item cat 3.
Item cat 4	The item category 4 code indicates the item's genre. RSA strongly recommends you assign item cat 4 codes to your collection, especially for any new items cataloged.
Item cat 5	The item category 5 code indicates the item's sub-genre. Assigning item cat 5 codes to your collection is optional.
Media desk	This code is part of a WorkFlows module not currently used by RSA libraries. The value for media desk will remain "Will not be modified."
Number of pieces	Multi-piece items that circulate as a single unit (i.e., assigned a single barcode) should be assigned the appropriate number depending on how many pieces are included in the item. To enter a value for number of pieces in the edit items box, select the blank option from the drop-down menu. Type the value for the number of pieces that should be assigned to all of the items in the item list.
Permanent	Select "Yes" or "No" to indicate if the item is permanent to your collection. Most items should be marked as permanent. Rental or interlibrary loan items are two examples of items that may be marked as non-permanent.
Price	All items cataloged in WorkFlows should be assigned a price in case the item is lost or damaged. To enter a value for price in the edit items box, select the blank option from the drop-down menu. Type the price that should be assigned to all of the items in the item list. You do not need to include a dollar sign before the price, but you will need to enter the price in dollars and cents (i.e., 20.00 – not 20).
Shadow item	Select "Yes" or "No" to indicate if all of the items in the item list should be shadowed. Shadowed items are visible in WorkFlows, but not the RSACat. Equipment and interlibrary loan items are two examples of items that your library might shadow.
Circulate item	Select "Yes" or "No" to indicate if all of the items in the item list can be checked out. Most items should be allowed to circulate. Reference materials are one example that may be marked as non-circulating.

Below is a screen shot of the edits performed on a list of items cataloged by Odell Public Library District that share the following:

- The item type NEW-BOOK or BOOK-NEW
- The home location FICTION
- A date created before 07/01/2012

The item group editor will be used to modify the following for all of the Odell items:

- The item type will be modified to BOOK.
- The item category 1 code will be modified to FICTION.
- The item category 2 code will be modified to ADULT.

10. After you select the item value(s) to modify, click the Edit Items button.

Depending on the number of items in the item list, the item group editor may take a minute or two to modify the items.

Once the modifications are complete, the items from the item list will appear listed at the bottom of the edit items box:

11. Scroll through the item list, and check the Status column. Make sure "Modified" appears as the status.

If "No Changes" appears as the status, this means that particular item was already assigned the value(s) you selected to modify.

If "Item not found in catalog" appears as the status, this most likely means the item was deleted from WorkFlows since you included it in the item list. The item group editor was unable to find the item in the database to modify it.

12. Click the Close button once you confirm the items were modified.

--or--

If you need to perform additional modifications to this item list:
   a. Click the Reset button in the edit items box to clear the values you selected to modify under "Item information" and "Extended information."
   b. Select the appropriate item values or extended information notes to modify.
   c. Click the Edit Items button.

Verifying Edits to Items

After you modify items in the item group editor wizard, you have two options to verify the modifications were performed on those items:

- Run a report in Web Reporter. Please note that modifications to items are not immediately visible in Web Reporter. The modifications will only be visible in Web Reporter the following day. For more information about searching for modified items, please see the section of this document titled "Considerations When Searching for Recently Modified Items."

- "Spot check" several items you modified using the Item Search and Display wizard. You must use another wizard to spot check modifications, as the item group editor is unable to display item information directly from the result list or item list. In order to easily switch between the item group editor and the Item Search and Display wizard, please ensure multiple windows mode and tabbed windows are configured in WorkFlows. For instructions how to configure these settings, please see the section of this document titled "Enabling Multiple Windows Mode & Tabbed Windows in WorkFlows."

To verify edits to items using the Item Search and Display wizard:

1. From the Edit Items box in the item group editor wizard, note either the title or the item ID of an item whose edits you want to verify. An example title and item ID appear in red boxes below.

   If you will use the item ID, you may find it helpful to write down the item ID on scratch paper.

2. Leave the Edit Items box open in the item group editor in case you want to spot check more items.

3. From the Common Tasks toolbar, left click on the Item Search and Display wizard:

4. Once you click on the Item Search and Display wizard, two tabs—one for the item group editor and another for Item Search and Display—should appear at the top or the bottom of your screen. The location of the tabs on your screen depends on your setting for tabbed window display.

In the screen shot below, the two tabs for the item group editor and the Item Search and Display wizard appear at the top of the screen:
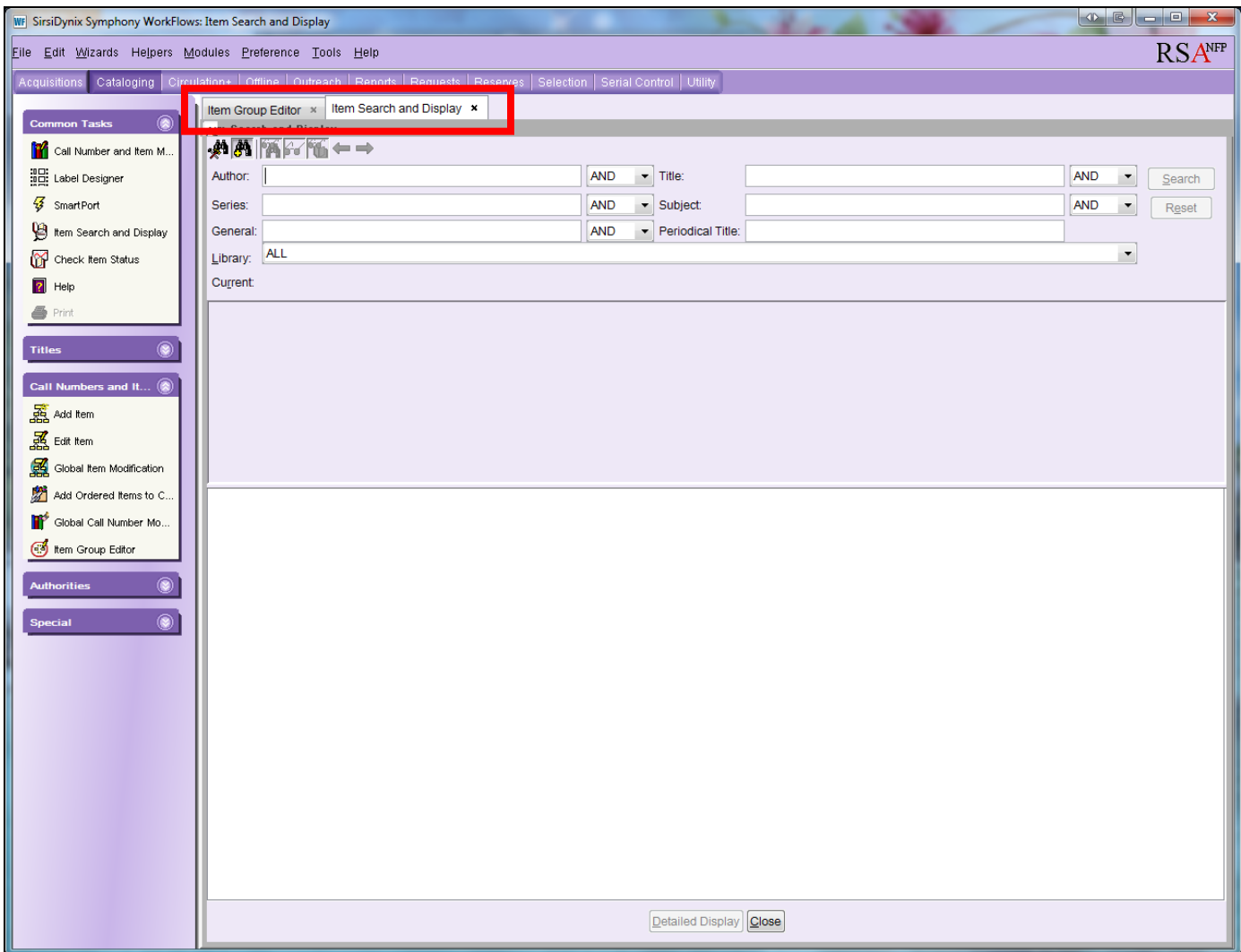
5. Search by title or item ID in the Item Search and Display wizard.

If you search by title, narrow the search to your library's collection using the Library drop-down menu. Hit <Enter> on your keyboard or click the Search button.
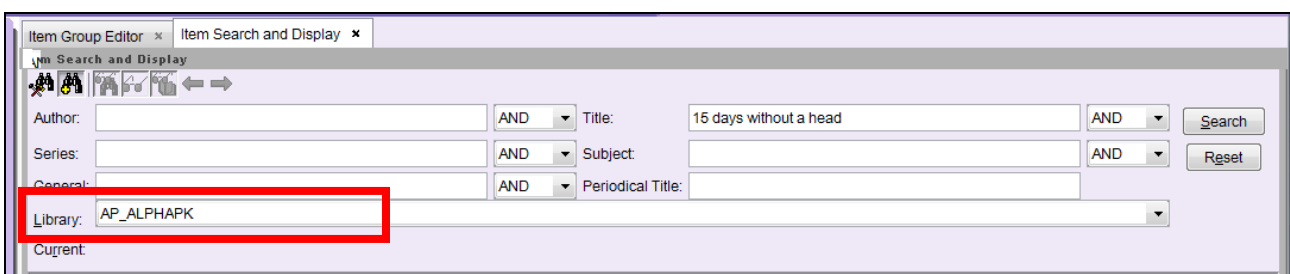
If you search by item ID, click the Advanced Search helper button in the upper left corner of the Item Search and Display wizard:
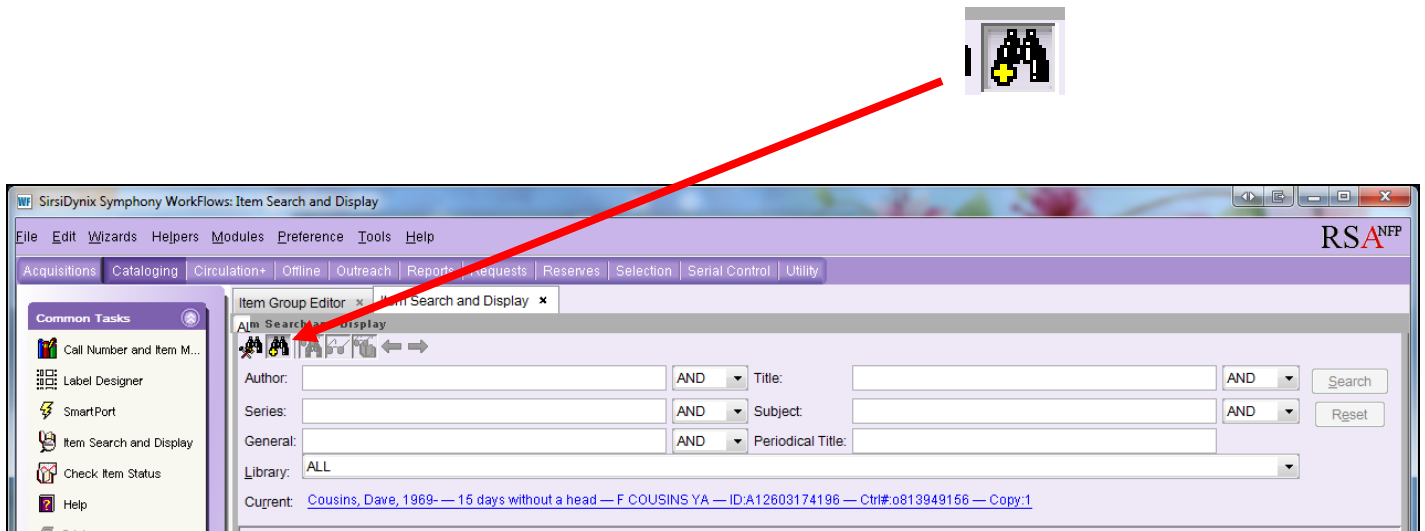
From the Advanced Search screen, select "Item ID" if it does not already appear in the Index menu.

Under Type, select the button next to "Exact" if it is not already selected.

Type in the item ID for which you want to search.
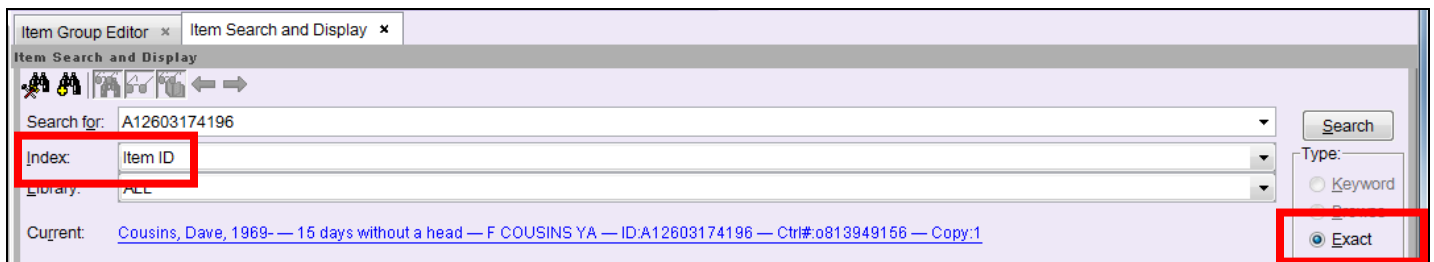
Hit <Enter> on your keyboard or click the Search button.

6. Once the record displays, click on the Call/Number Item tab if it is not already open:
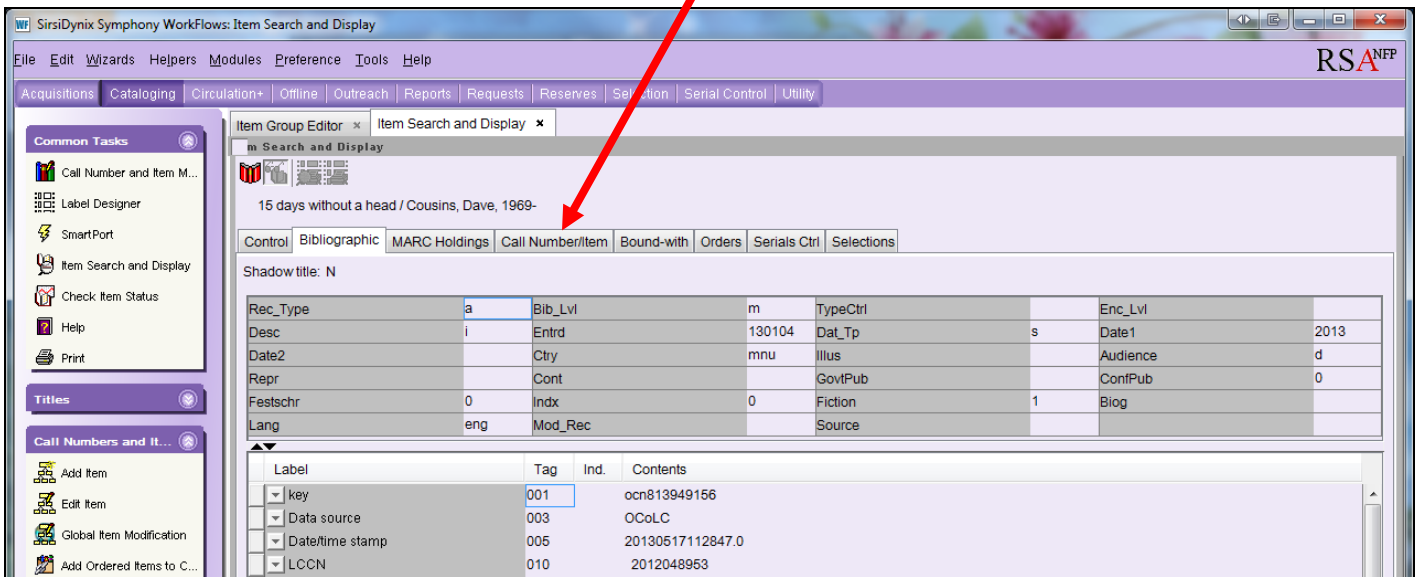
7. Make sure the line with your library's item ID is highlighted in blue in the tree:
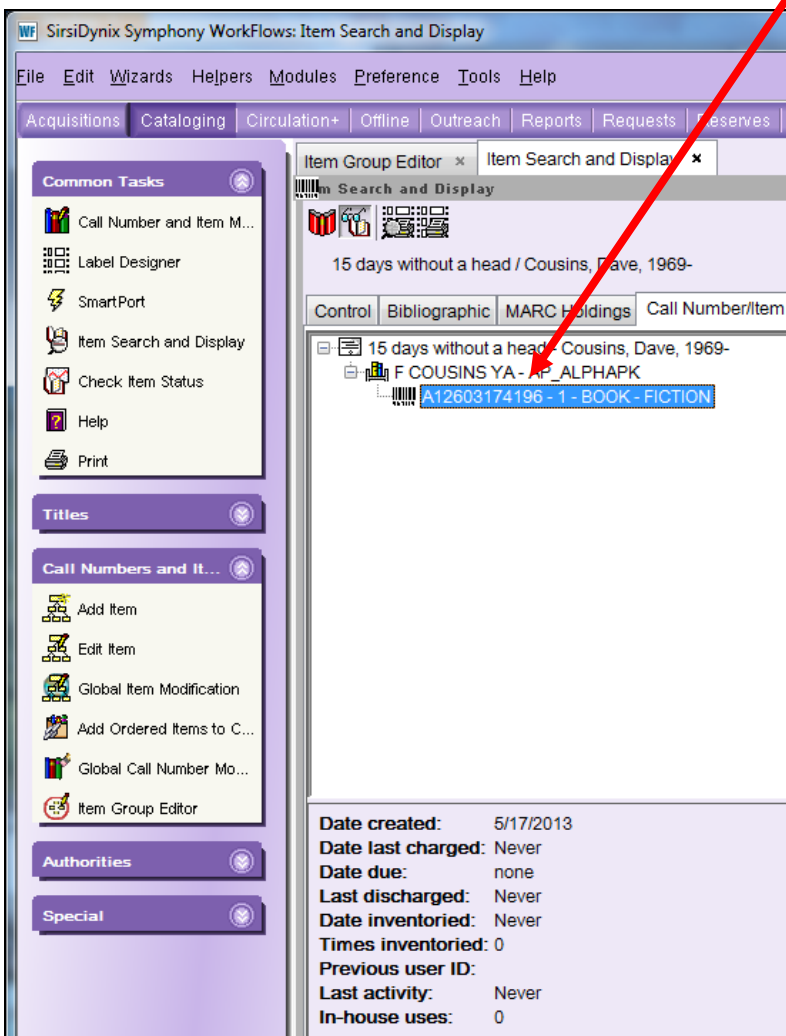
8. On the Item Info tab, verify the information assigned to that item reflects the edit(s) you performed on that item in the item group editor wizard.

9. Once you verify the item information reflects your edits, click the "Return to Search" button if you want to check another item you modified in the item group editor.

10. If you are finished verifying items modified in the item group editor, click the "Close" button at the bottom.

Saving an Item List as a Group

After you perform a search in the item group editor wizard, you can save those items as a group. Saving groups allows you to easily restore the items' original values if you had subsequently modified those values. For example, nonfiction books shelved in the new nonfiction section, NEW-NF, that are no longer considered new materials, could be edited back to their original home location code of NONFICTION by using a group you had previously saved in the item group editor wizard.

You may only create groups of items cataloged by your library. You may create groups that contain more than 5,000 items, but please remember your library should edit no more than 5,000 items per day in the item group editor.

Once a group is restored to its original values, that group should be promptly removed from the item group editor wizard. Large numbers of groups saved in the item group editor may affect your ability to search for and display a list of all groups saved by your library.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.
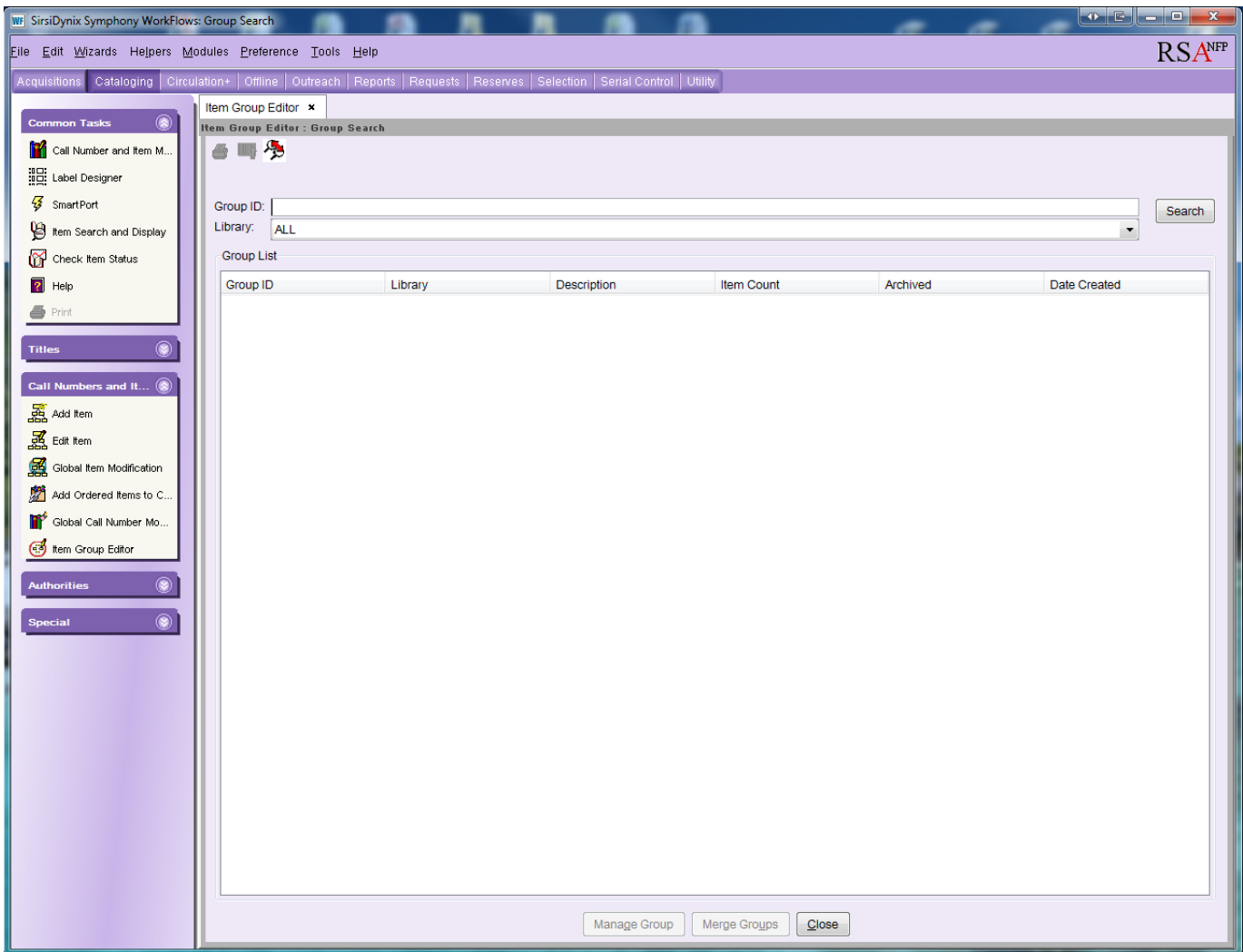
If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The advanced search screen opens. Search for the items you want to save as a group, or upload a file of item IDs.

7. If you entered a search for the items, click the "Add selected" or "Add all" helper button (circled below) to add the items you want to save as a group to the item list.

   If you uploaded a file of item IDs, those items should appear in the item list automatically.

Remember:

- The "Add all" helper button adds *only* those items displayed on the *current* page of results. Use the blue arrow buttons for "Search Forward" and "Search Backward" to navigate through the search results. The navigation buttons are circled in the screen shot below. WorkFlows may take a minute or two to navigate between pages of search results.

- ***Only 5,000 items may be added to the item list at one time.*** Your library should edit no more than 5,000 items per day.

- You can search for items cataloged by other libraries in the item group editor wizard. However, WorkFlows will not allow you to add those other libraries' items to the item list. If you click either the "Add selected" or the "Add all" helper button to try to add items not created by your library to the item list, WorkFlows will simply not add the items. No error message will appear.
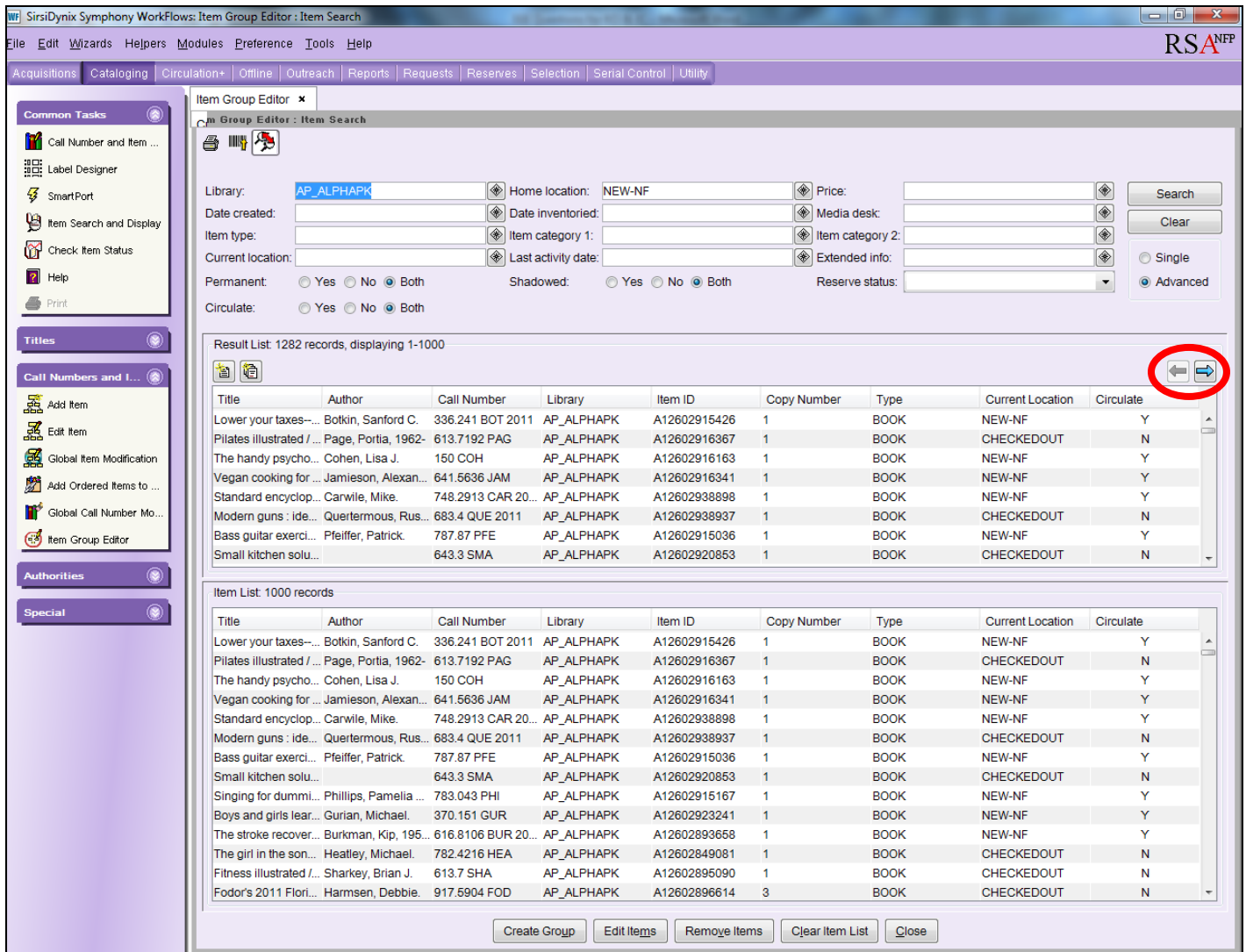
8. Once you have added all of the items to the list that you want to save as a group, click the "Create Group" button at the bottom.

9. The Create Group window opens.

   In the Group ID field, type a name for the group. The group ID may be up to 20 characters. Any text typed into the group ID field will automatically appear in uppercase.

   Please do not select the AUTO option that appears in the group ID drop-down menu. If you select this option, WorkFlows will assign an auto-generated number to your item group, which will not help you—or RSA staff—easily identify to which library the group belongs.

   RSA recommends you create group IDs using these guidelines:
   - ***Begin with the first two letters of your library's WorkFlows code (e.g., AP for Alpha Park Public Library).***
   - The value (item type, home location, item category, etc.) currently assigned to the group, which you plan to modify after you save the group (e.g., NEW-NF).
   - If there is space in the group ID's 20-character limit, enter today's date so you can easily determine from your library's list of saved groups when that particular group was created (e.g., 07.05.12)

   For example, for a list of Alpha Park Public Library's items that are currently shelved in the new nonfiction location, you would enter the group ID: AP NEW-NF 07.05.12
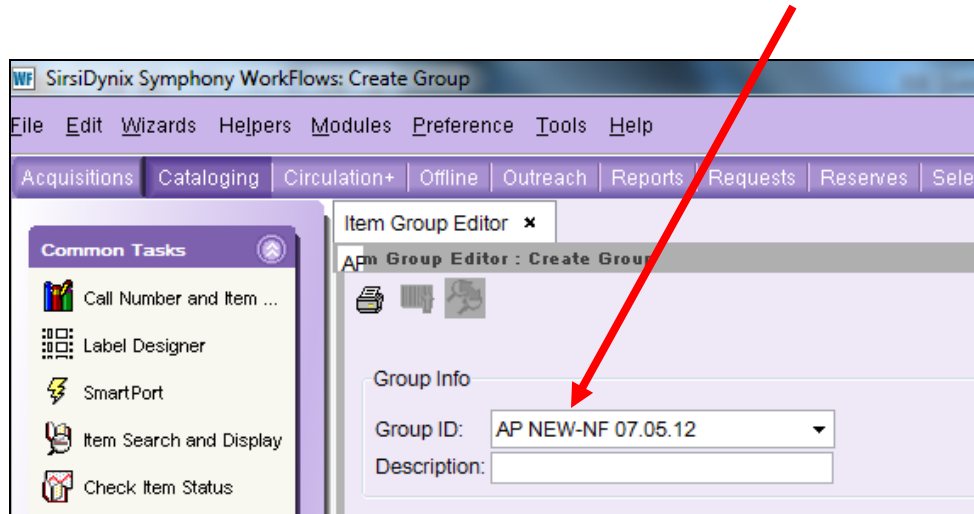
10. In the Description field, enter a short statement that describes the items in that group.
    For example: Alpha Park items shelved in NEW-NF as of 07.05.12
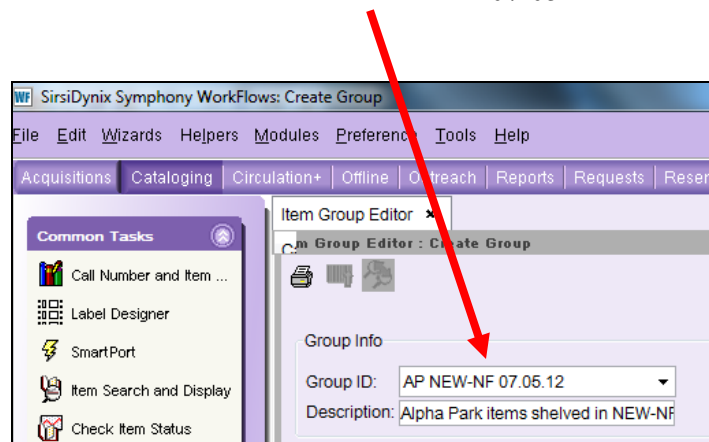
11. Once you have entered a group ID and description, click the "Create Group" button at the bottom.

WorkFlows may take a minute or two to save the group, depending on its size.

12. A pop-up box will appear, confirming the "Group created." Click OK to close the box.
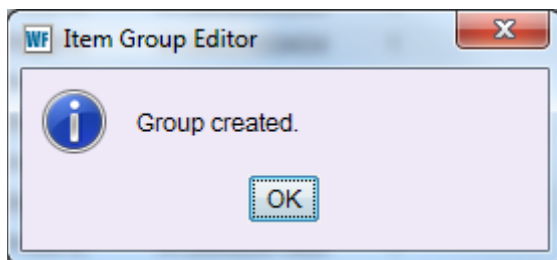
13. After the group is saved, the following information (circled below) appears at the top of the item list, confirming the creation of the group:
   - Date created
   - Date last modified
   - Created by
   - Last modified by
   - Library

14. Click the Close button at the bottom.

Finding a Group

You can use the item group editor wizard to search for all of your library's saved groups or a specific group.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The advanced search screen opens. Click the Item/Group Search helper button:

7. The Group Search screen opens.

   To retrieve a list of all groups created by your library:
   a. Select your WorkFlows code from the Library drop-down menu.
   b. Leave the group ID box blank.
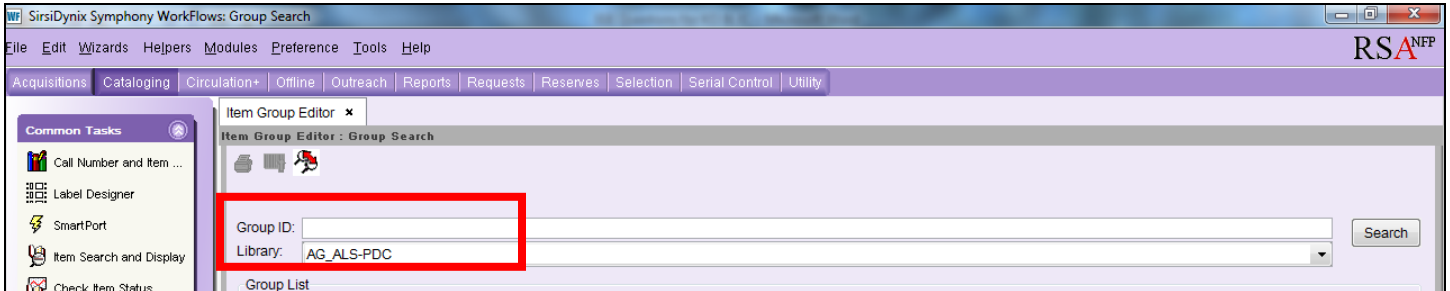
   c. Click the Search button or hit <Enter> on your keyboard.
      The item group editor wizard will retrieve a list of all groups created by your library:
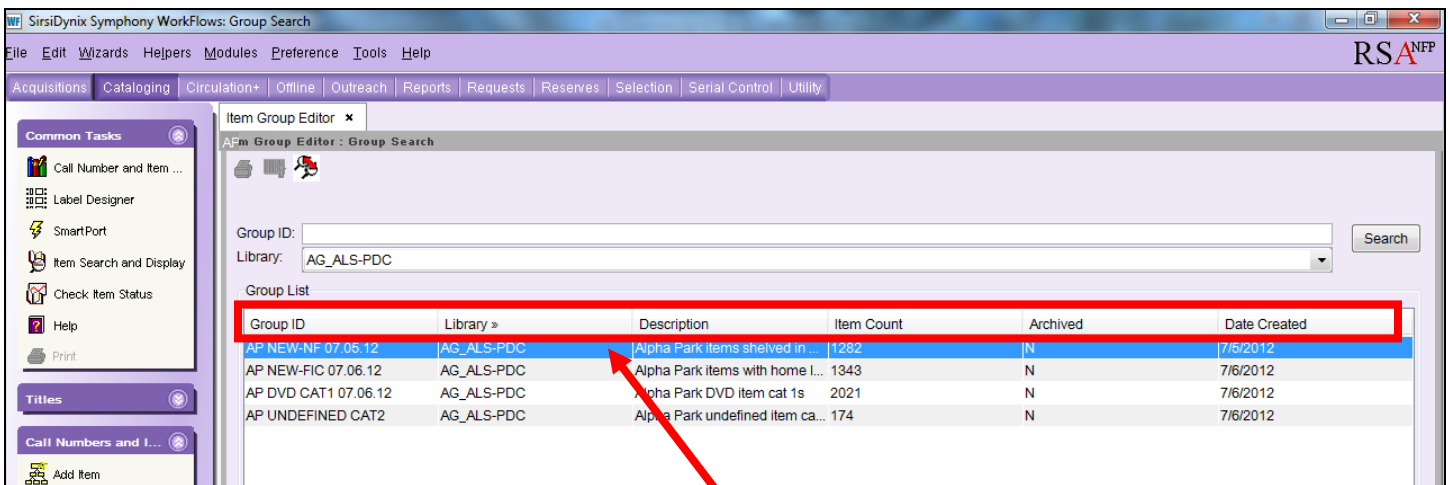
You can re-sort the list of groups by clicking on any of the column headings. Contents in the list can be sorted in ascending or descending order.

For example, if the "Group ID" column heading from the screen shot shown above is clicked, the list will re-sort in ascending order by the group ID:
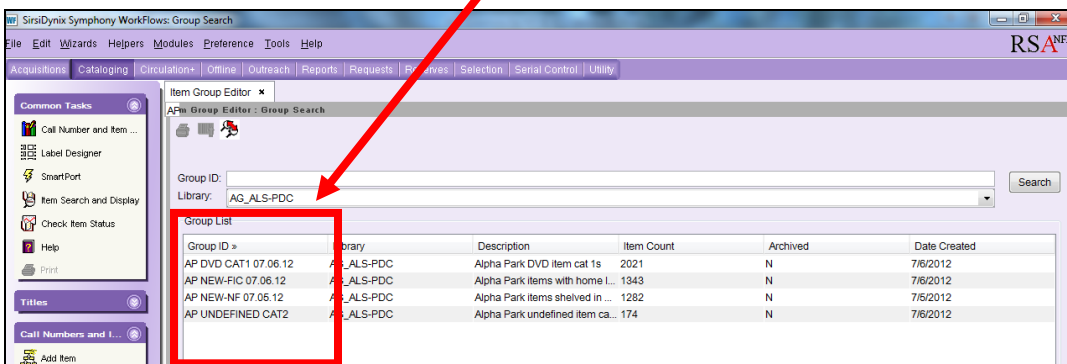
To retrieve a specific group created by your library:
    a.   Enter all or part of the name in the group ID field. Remember to include the first two letters of your library's WorkFlows code when searching by group ID.
    b.   You can leave the library selection as "ALL," or you can select your library from the drop-down menu.
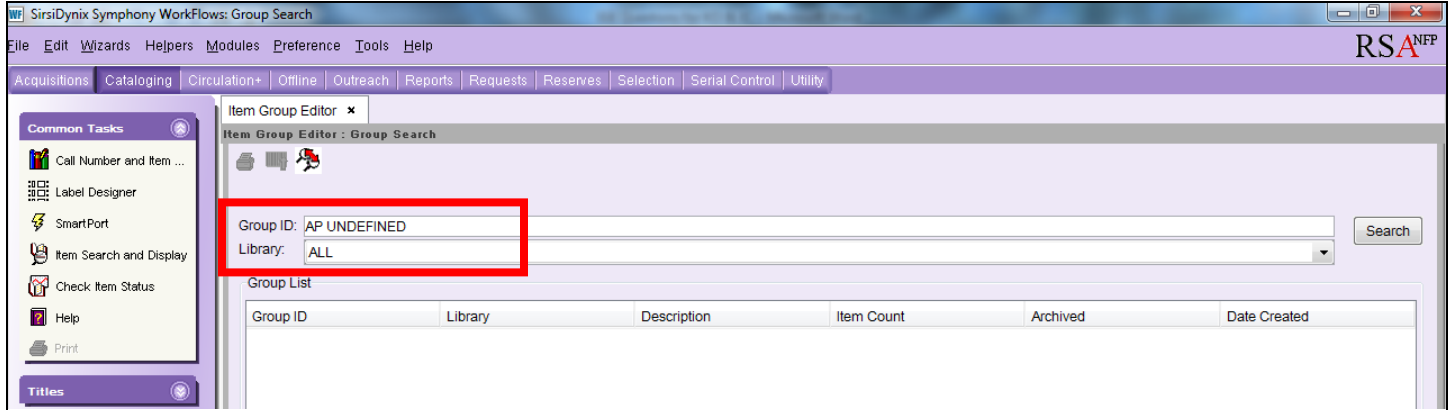
    c.   Click the Search button or hit <Enter> on your keyboard.

The item group editor will display the item list for that group:
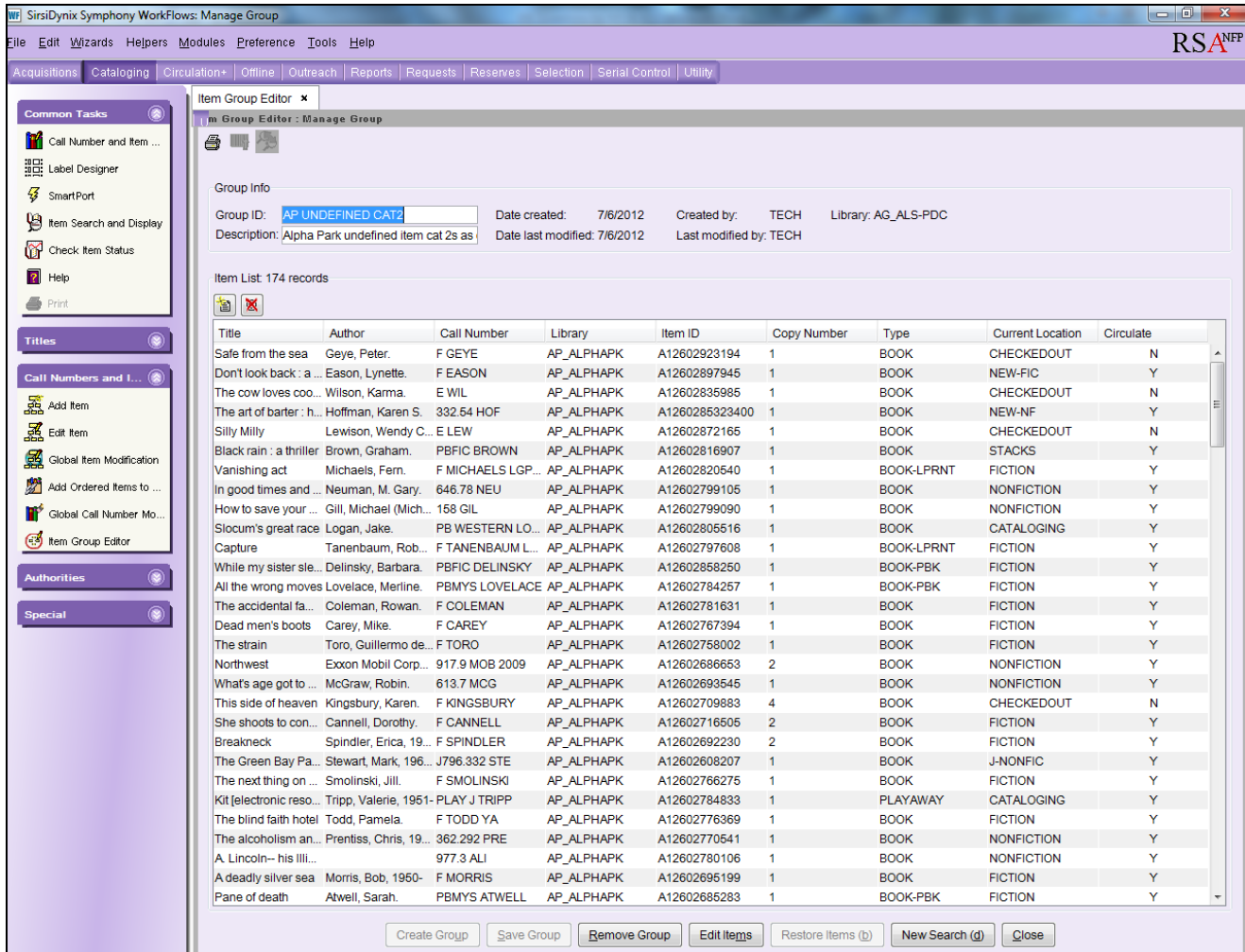
Exporting a Group

You can export a group from the item group editor into an Excel spreadsheet. You can then save the spreadsheet to your computer and manipulate it from there (re-sort the data, resize columns, remove rows or columns, etc.). Exporting groups may be helpful if your library wants to save lists of display items, subject bibliographies, and other groups of items external to the item group editor.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@railslibraries.info or 1-866-940-4083.
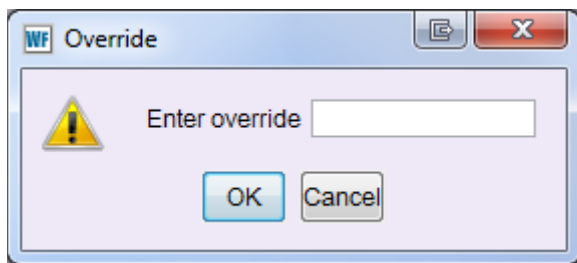
Important:
Please do not share the override password with staff members—either at your library or at other RSA libraries—if they have not completed item group editor training.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

The advanced search screen opens. Click the Item/Group Search helper button:

The Group Search screen opens:

6. Search for the group you want to export.

   If your search returns a list of groups, click on the group you want to export so it appears in blue:

7. Click the "Manage Group" button at the bottom.

The item group editor will display the group:

8. Go to the File menu in the upper left corner. Select "Print Screen":

9. Your internet browser will open a window displaying the group:

Item Group Editor : Manage Group   05/28/2013

Group Info

Group ID:	W0 YA HALLOWEEN		Date created:	11/7/2012	Created by:	W0_TECH	Library: W0_WASH-PL
Description:	emily's halloween display as of 11/7/12		Date last modified:	11/7/2012	Last modified by:	W0_TECH	

Item List: 42 records

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Lord Loss	Shan, Darren.	YA FIC SHA	W0_WASH-PL	A66701349652	1	BOOK-YA	LOST-ASSUM	N
Cirque du Freak	Shan, Darren.	YA FIC SHA	W0_WASH-PL	A66701602115	1	BOOK-YA	CHECKEDOUT	N
Vampire kisses. Volume 1, Blood relatives	Schreiber, Ellen.	YA FIC SCH	W0_WASH-PL	A66701395792	1	BOOK-YA	YA-MANGA	Y
Companions of the night	Vande Velde, Vivian.	YA FIC VAN	W0_WASH-PL	A66701025266	1	BOOK-PBKYA	YA-FIC	Y
The Illinois road guide to haunted locations	Lewis, Chad.	133.109 LEW	W0_WASH-PL	A66701478980	1	BOOK	NONFICTION	Y
Ghost stories of Illinois	Christensen, Jo-Anne.	133.1 CHR	W0_WASH-PL	A66700947805	1	BOOK	NONFICTION	Y
Paranormal America : ghost encounters, UFO sightings, Bigfoot hunts, and other curiosities in religion and culture	Bader, Christopher David.	130.973 BAD	W0_WASH-PL	A66701571542	1	BOOK	NONFICTION	Y
Exploring the unexplained : the world's greatest marvels, mysteries and myths	Knauer, Kelly.	YA 001.94 EXP	W0_WASH-PL	A66701264331	1	BOOK-YA	YA-NF	Y
Possessions and exorcisms	Kallen, Stuart A., 1955-	YA 133.4 KAL	W0_WASH-PL	A66701487086	1	BOOK-YA	YA-NF	Y
Poltergeists	Kallen, Stuart A.,	YA	W0_WASH-PL	A66701486967	1	BOOK-YA	YA-NF	Y

🔍 100%

10. Beginning with the text "Group Info" in the upper left corner, highlight **all** of the text on the page or simultaneously press <Ctrl> + <a> on your keyboard so that all the text on the page appears in blue.

Item Group Editor : Manage Group   05/28/2013

Group Info

| Group ID: | W0 YA HALLOWEEN | | Date created: | 11/7/2012 | Created by: | W0_TECH | Library: | W0_WASH-PL |
| Description: | emily's halloween display as of 11/7/12 | | Date last modified: | 11/7/2012 | Last modified by: | W0_TECH | | |

Item List: 42 records

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Lord Loss	Shan, Darren.	YA FIC SHA	W0_WASH-PL	A66701349652	1	BOOK-YA	LOST-ASSUM	N
Cirque du Freak	Shan, Darren.	YA FIC SHA	W0_WASH-PL	A66701602115	1	BOOK-YA	CHECKEDOUT	N
Vampire kisses. Volume 1, Blood relatives	Schreiber, Ellen.	YA FIC SCH	W0_WASH-PL	A66701395792	1	BOOK-YA	YA-MANGA	Y
Companions of the night	Vande Velde, Vivian.	YA FIC VAN	W0_WASH-PL	A66701025266	1	BOOK-PBKYA	YA-FIC	Y
The Illinois road guide to haunted locations	Lewis, Chad.	133.109 LEW	W0_WASH-PL	A66701478980	1	BOOK	NONFICTION	Y
Ghost stories of Illinois	Christensen, Jo-Anne.	133.1 CHR	W0_WASH-PL	A66700947805	1	BOOK	NONFICTION	Y
Paranormal America : ghost encounters, UFO sightings, Bigfoot hunts, and other curiosities in religion and culture	Bader, Christopher David.	130.973 BAD	W0_WASH-PL	A66701571542	1	BOOK	NONFICTION	Y
Exploring the unexplained : the world's greatest marvels, mysteries and myths	Knauer, Kelly.	YA 001.94 EXP	W0_WASH-PL	A66701264331	1	BOOK-YA	YA-NF	Y
Possessions and exorcisms	Kallen, Stuart A., 1955-	YA 133.4 KAL	W0_WASH-PL	A66701487086	1	BOOK-YA	YA-NF	Y

11. Once all the text is highlighted in blue, right click with your mouse. Select "Copy" from the menu:
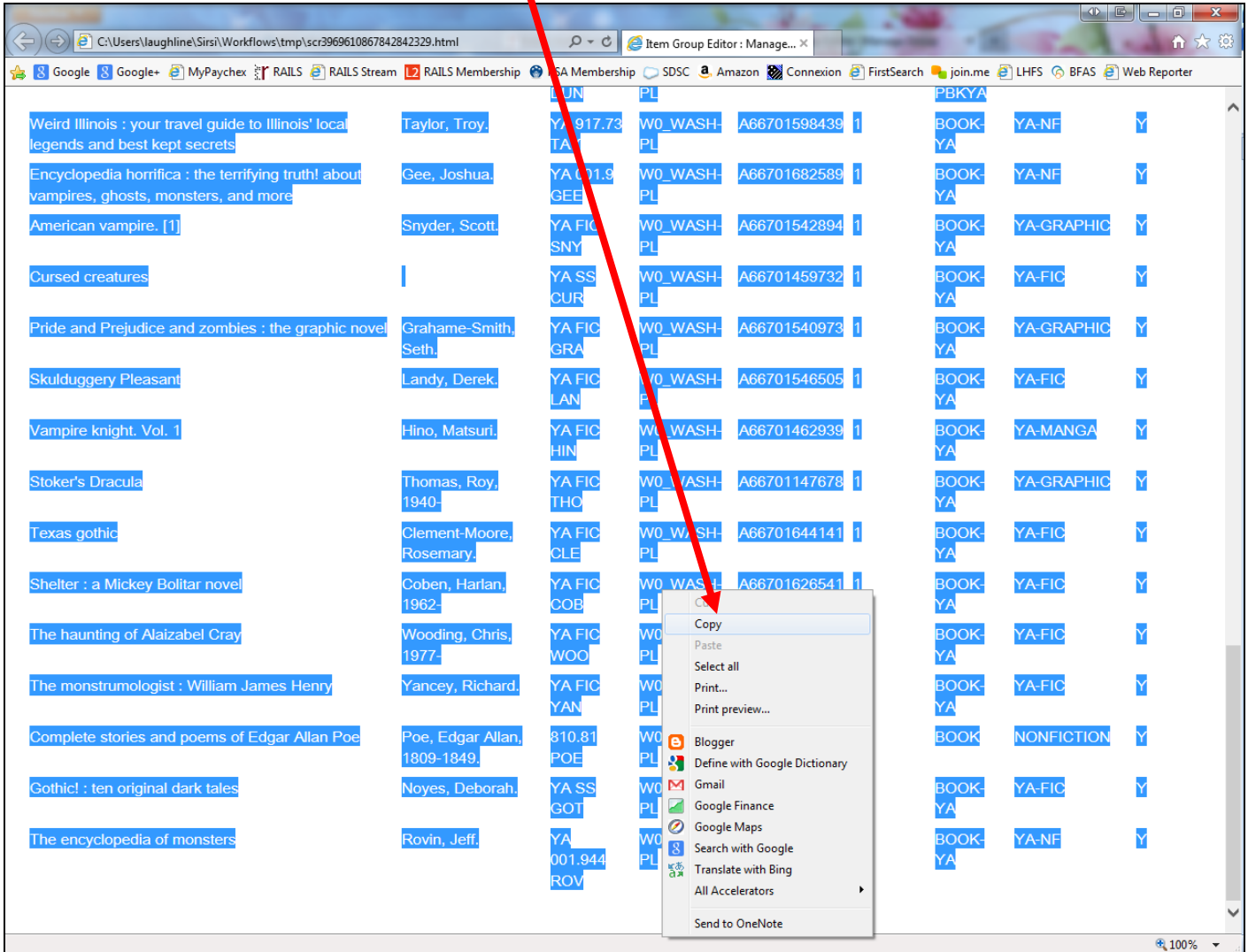
12. Open Microsoft Excel.

13. Right click on the first cell in the Excel spreadsheet and select Paste.

If there is more than one "Paste" option in the menu, select the option to "Match Destination Formatting":
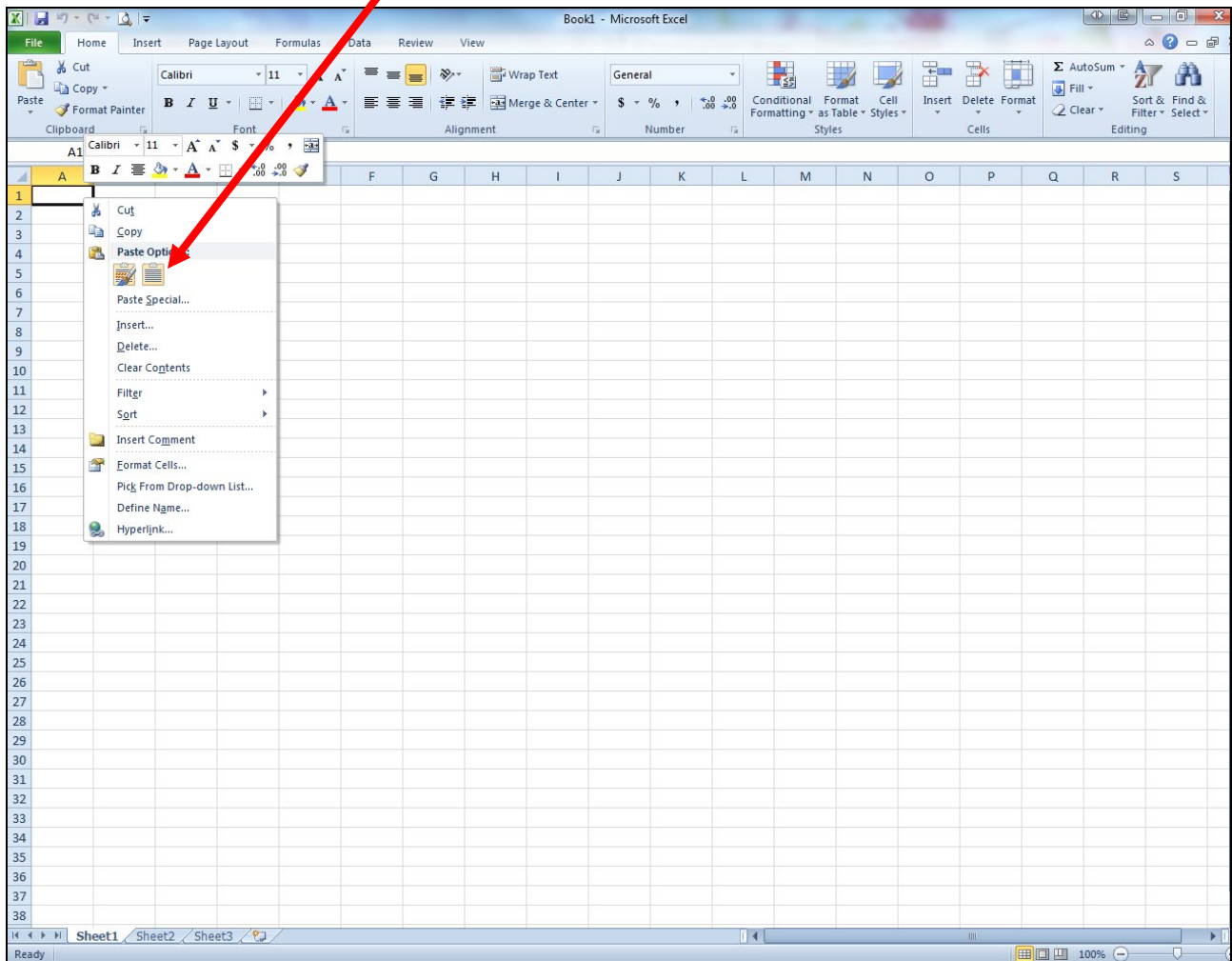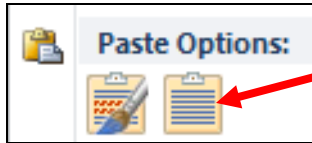
14. The exported group will paste in plain text into the spreadsheet:
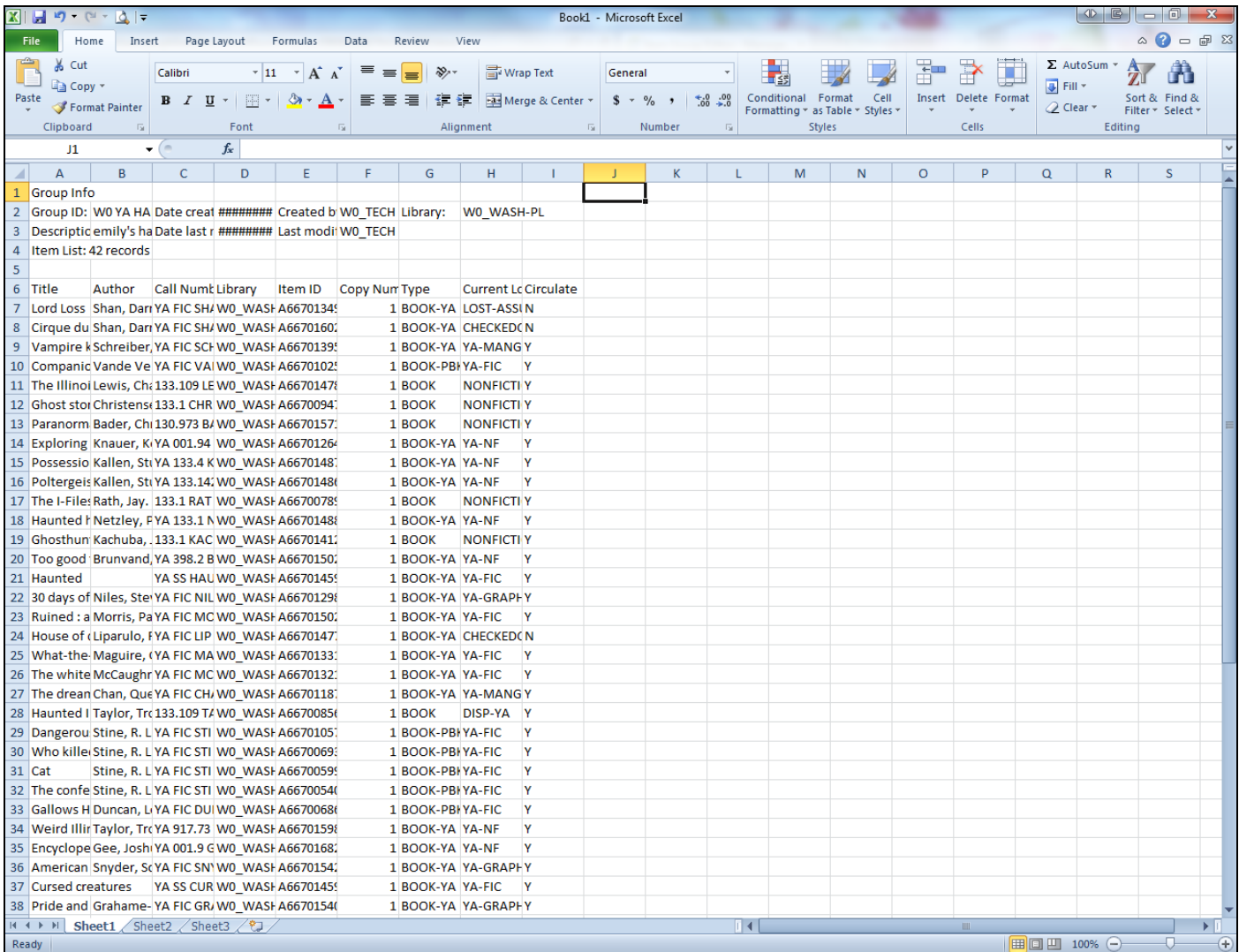
You can then save the spreadsheet to your computer and manipulate it from there (re-sort the data, resize columns, remove rows or columns, etc.).
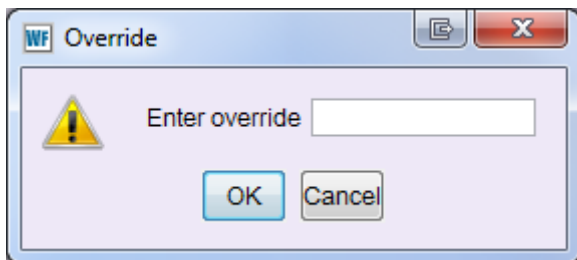
Adding Items to a Saved Group

WorkFlows will only allow you to add items to a group created by your library. WorkFlows will not allow you to add items to groups created by other RSA libraries.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

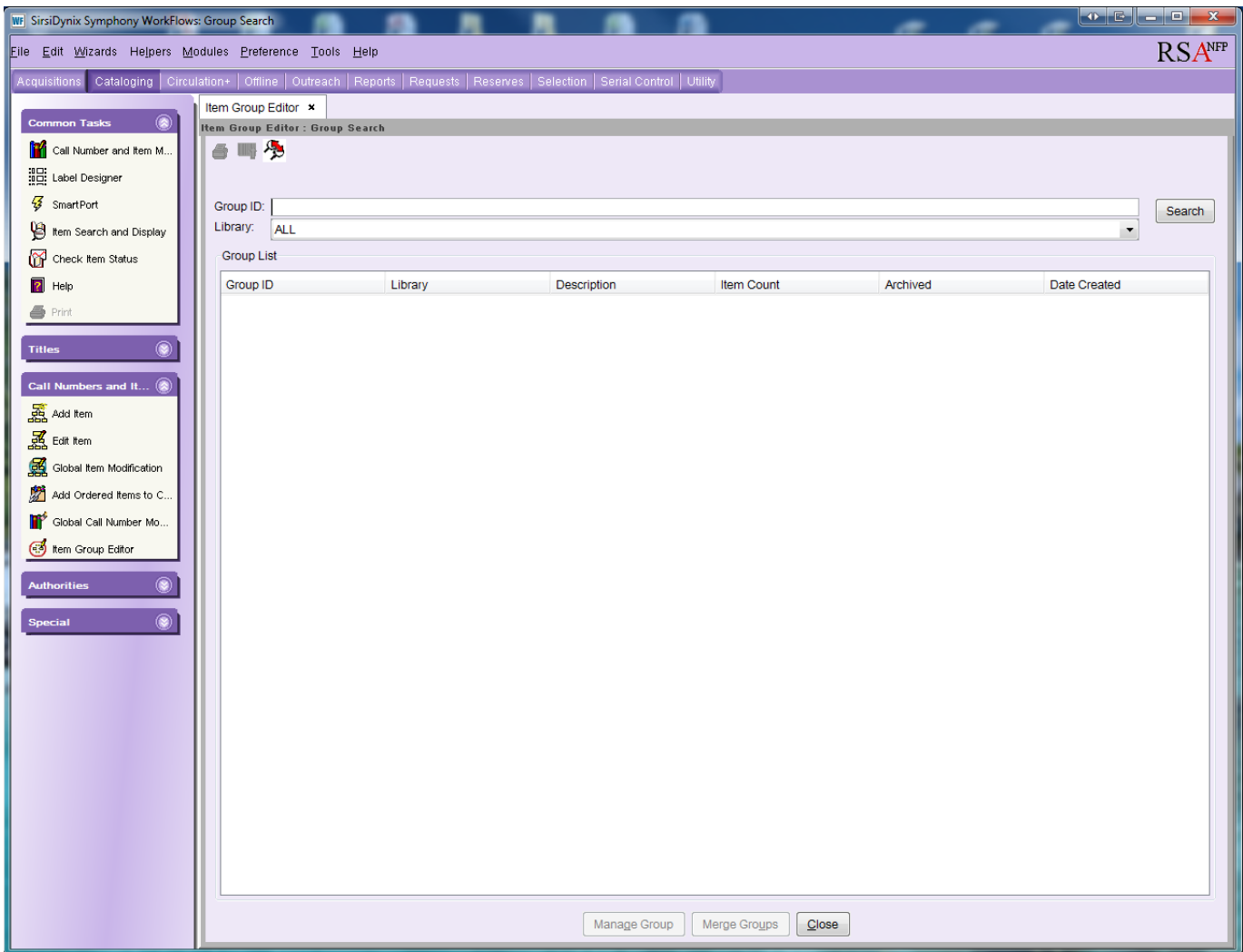6. The advanced search screen opens. Click the Item/Group Search helper button:

The Group Search screen opens:

7. Search for the group you want to modify.

   If your search returns a list of groups, click on the group you want to modify so it appears in blue:

8. Click the "Manage Group" button at the bottom.

The item group editor will display the group:

9. Click the Add Items helper button in the upper left corner:

The Edit Items box will open:
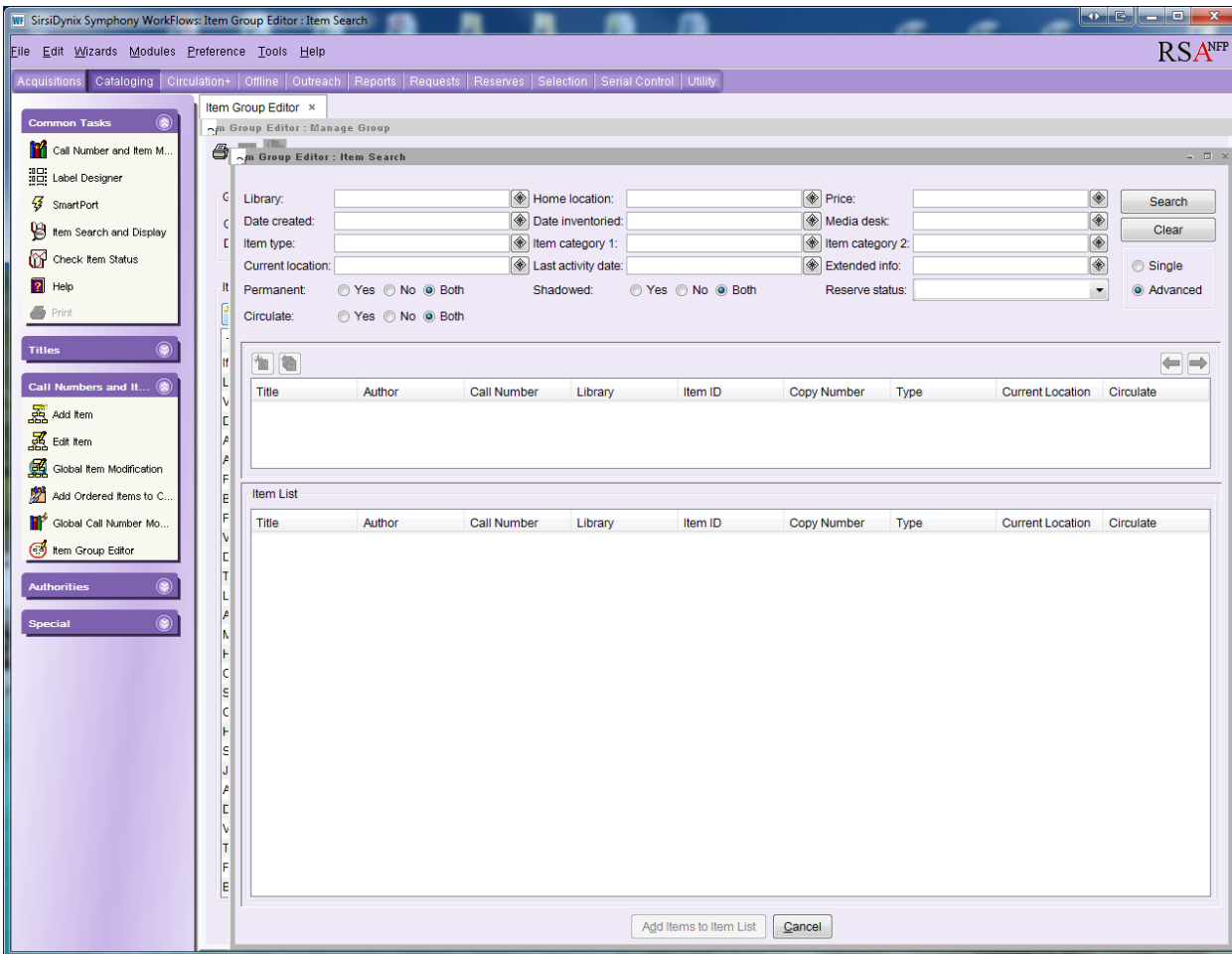
10. Using the single or advanced search, find the items you want to add to the group.

11. Click the "Add Items to Item List" button when you are finished searching for items to add to the group:
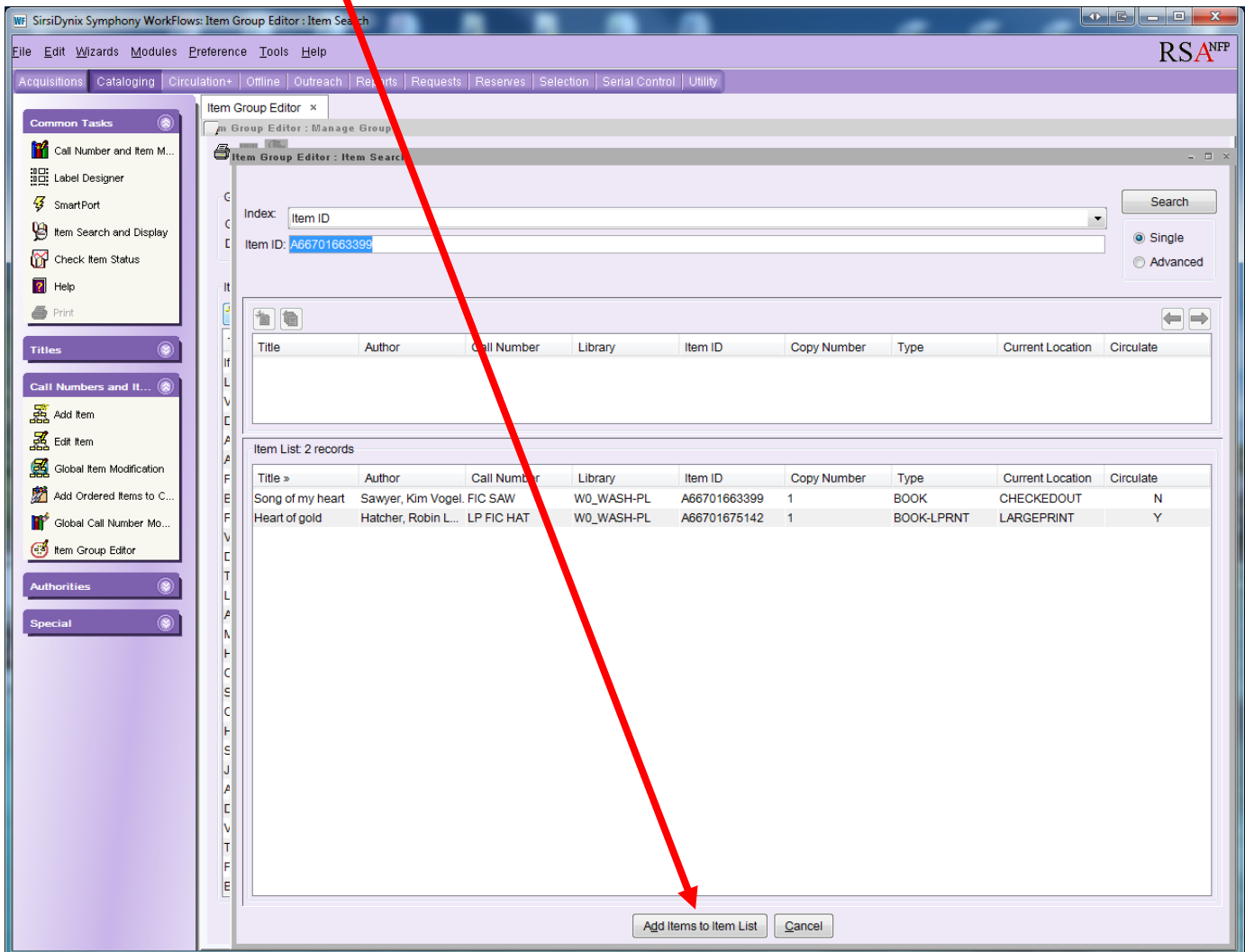
12. The items you added will appear at the bottom of the displayed group. You may need to scroll down to see the items you added to the group.

13. Click the "Save Group" button to save the group with the added items.

14. A pop-up box will confirm the group saved. Click OK.
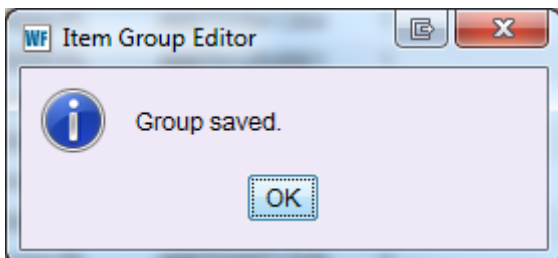
Removing Items from a Saved Group

WorkFlows will only allow you to remove items from a group created by your library. WorkFlows will not allow you to remove items from groups created by other RSA libraries.

Removing items from a group *only* removes the items from that group. The items still remain in WorkFlows, but they are no longer associated with that group in the item group editor wizard.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. The advanced search screen opens. Click the Item/Group Search helper button:

The Group Search screen opens:

7. Search for the group you want to modify.

   If your search returns a list of groups, click on the group you want to modify so it appears in blue:

8. Click the "Manage Group" button at the bottom.

9. The item group editor will display the group. Click on the item you want to remove from the group so that it appears in blue:

10. Click the Remove Items helper button in the upper left corner:

11. The item you selected will be immediately removed from the group. The item list count at the top of the group should have decreased by one item.
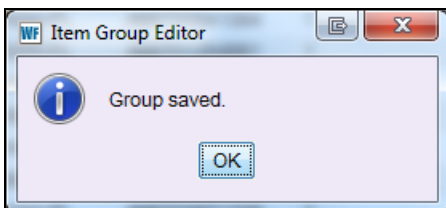
The number shown on your screen will differ, depending on how many items were saved in your group and how many items you removed.

12. Click the "Save Group" button to save the group with the items removed from it.

13. A pop-up box will confirm the group saved. Click OK.

Editing Items Saved as a Group

The item group editor wizard allows you to edit values for a list of items that you have saved as a group.

RSA recommends saving groups of items if you plan to restore those items to their original values at some point. When you edit items that belong to a saved group, you can select the option to "archive before editing." When this archive option is selected, WorkFlows saves the original, pre-edited values of the items that will be modified. (Note, however, that WorkFlows will not archive values of fields that are not modified in the item group editor wizard.)

WorkFlows will retain the archived values until you restore those values to the items in that group. Any actions that are performed on the items between the time you save the archive and restore the values will not affect the archived values.

If an item is included in more than one group, and those groups have also been archived, that item will use the values of the group that is most recently restored.
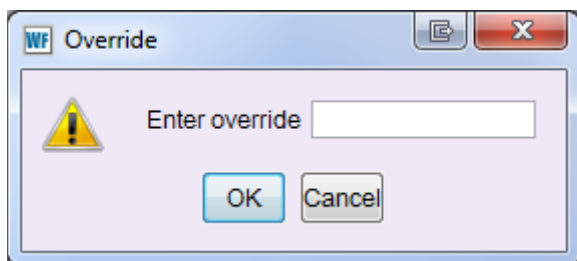
WorkFlows will only allow you to edit items in groups that are created by your library. WorkFlows will not allow you to edit any items in groups created by other RSA libraries.

For example:
You create a group of holiday DVDs, archive the values, and then change the home location value to indicate these DVDs are on display. While the holiday DVDs are on display, you might change the home location value for one or two of these DVDs (for example, the item needs to be sent to the cataloger to be repaired so the item's home location value is changed to CATALOGING.)

When you restore the item values for this group of DVDs, they will all be restored to the home location value that was saved in the archive (i.e., HOLIDAY). The DVD assigned the home location of CATALOGING (or some other modified value) would also have its home location value restored to HOLIDAY.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. After you enter the override password, the item group editor's advanced search screen opens. Click the Item/Group Search helper button:
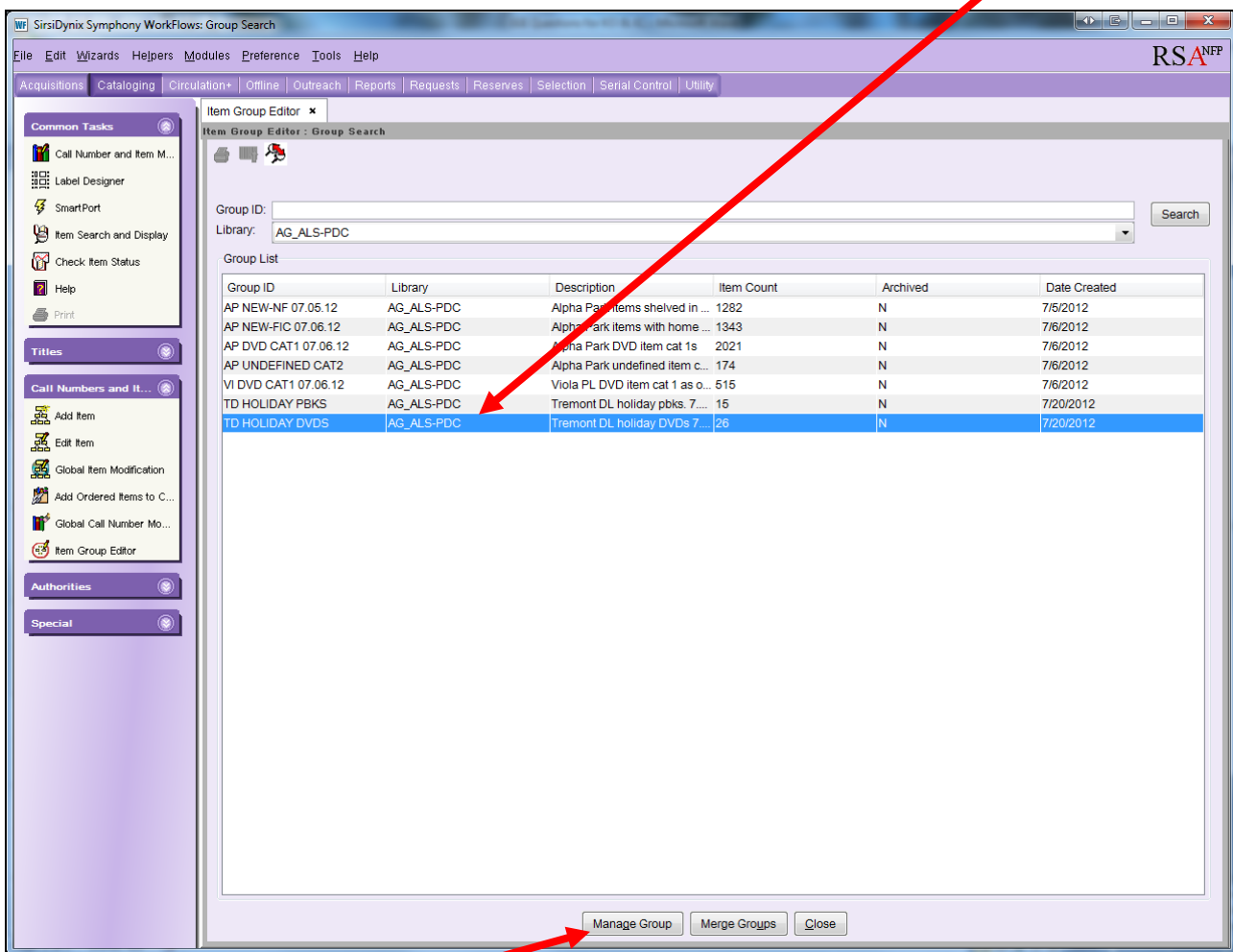
7. The Group Search screen opens. Find the group you want to edit.

   Group Search Tip: To quickly retrieve a list of all groups created by your library, leave the Group ID field blank, select your WorkFlows code from the library menu, and click the Search button:
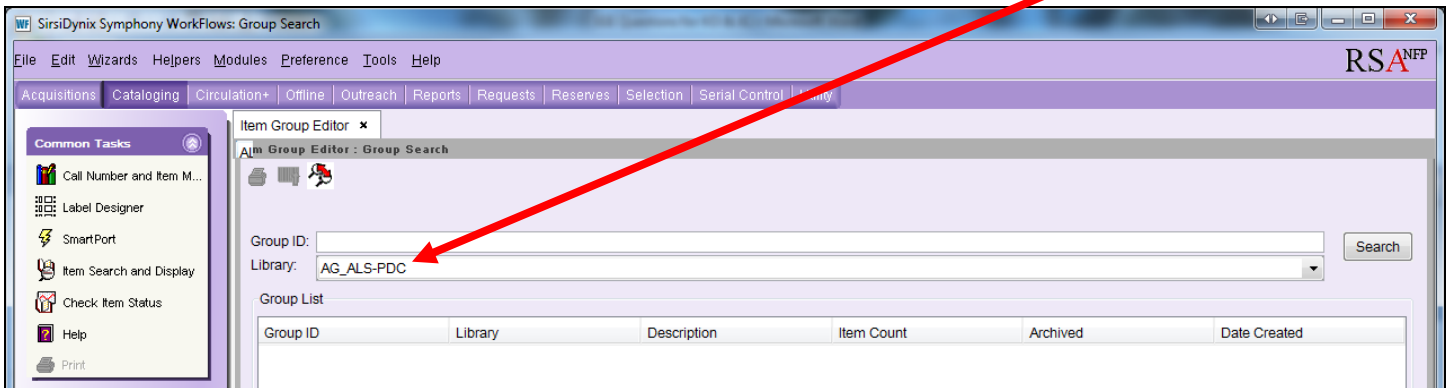
8. From the group list, click on the group you want to edit so that the group appears in blue:

9. Click the Manage Group button at the bottom.

The Manage Group screen will display a list of the items that are saved in that group:

10. Click the Edit Items button at the bottom.

The Edit Items box will open:

11. **Important:** To save the current settings for all of the items before you perform the edits, check the box next to "Archive before editing."

By selecting the archive option, you will be able to restore the values of the items in that group back to the values they were originally assigned before you edited those items.

12. In the Edit Items box, select the fields you want to modify for all of the items in the group. You can select a single field, or a combination of fields, to modify.

Under "Item information" in the Edit Items box, use the drop-down menus to select the values that the item group editor should assign to all of the items in the group.

Under "Extended information" in the Edit Items box, you can type in the text that should be assigned as a circ, public, or staff note. You can create a new note, add the note to the end of the existing note ("append"), or replace the existing note with a new note. You cannot erase an existing note by leaving the note's text field blank and selecting the "New" or "Replace" option.

Remember:
The item information values you select and the extended information text you enter in the Edit Items box will be applied to *all* of the items in the group.

Below is a screen shot of the edits performed on a group of items cataloged by Tremont District Library that share the following:
- The home location HOLIDAY
- The item type DVD

The item group editor will be used to modify the home location of all these items to DISPLAY.

Note that the "Archive before editing" box is checked (squared below).
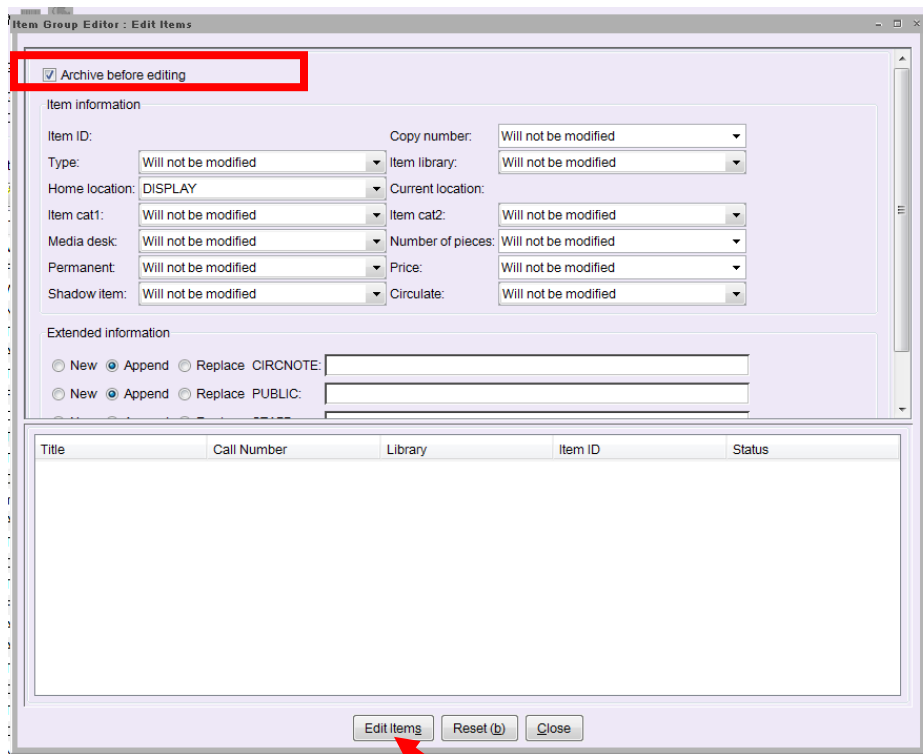
13. After you select the item value(s) to modify, click the Edit Items button at the bottom.

Depending on the number of items in the group, the item group editor may take a minute or two to modify the items.

Once the modifications are complete, the items included in the group will appear listed at the bottom of the Edit Items box:

14. Scroll through the item list, and check the status column. Make sure "Modified" appears as the status.

   If "No Changes" appears as the status, this means that particular item was already assigned the value(s) you selected to modify.

   If "Item not found in catalog" appears as the status, this most likely means that the item was deleted from WorkFlows since it had been included in the group. The item group editor was unable to find the item in the database to modify it.

   Remember: WorkFlows will only allow you to edit groups that include your library's items. If you try to edit items in another library's group, WorkFlows will display this status message: "Failed: You may not maintain this library's item information."

15. Click the Close button once you confirm the items were modified.

--or--

If you need to perform additional modifications to this group:
    d. Click the Reset button in the Edit Items box to clear the values you selected to modify under "Item information" and "Extended information."
    e. Select the appropriate item values or extended information notes to modify.
    f. Check the box next to "Archive before editing" if you want to save the current settings for all of the items before you perform the edits.
    g. Click the Edit Items button.

Important:
For information about how to search for recently modified items in WorkFlows, the RSACat, and Web Reporter, please see the section of this guide "Considerations When Searching for Recently Modified Items."

Restoring Items in a Group to Their Original Values

If you selected the archive option before you edited the items in a saved group, you can use the item group editor wizard to easily restore the items in that group to their original values.
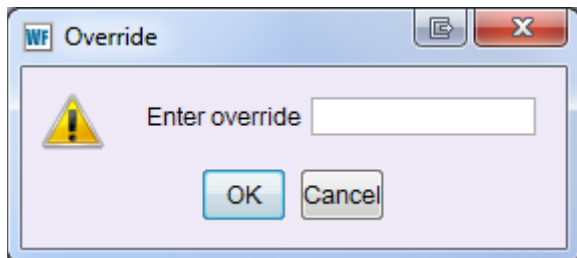
If an item is included in more than one group, and those groups have also been archived, that item will use the values of the group that is most recently restored.

WorkFlows will only allow you to restore values for items in groups that are created by your library. It will not allow you to restore values for any items created by other RSA libraries.

For example:
In the previous section of this guide, you created a group of holiday DVDs, archived the values, and then changed the home location value to indicate these DVDs are on display. When the holiday DVDs are no longer on display, you can use the item group editor to restore the home location of all of the DVDs in this group to HOLIDAY—the home location value originally assigned to these DVDs that is saved in the group's archived settings in the item group editor wizard.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. After you enter the override password, the item group editor's advanced search screen opens.

Click the Item/Group Search helper button:

7. The Group Search screen opens. Find the group you want to restore.

   Group Search Tip: To quickly retrieve a list of all groups created by your library, leave the Group ID field blank, select your WorkFlows code from the library menu, and click the Search button:
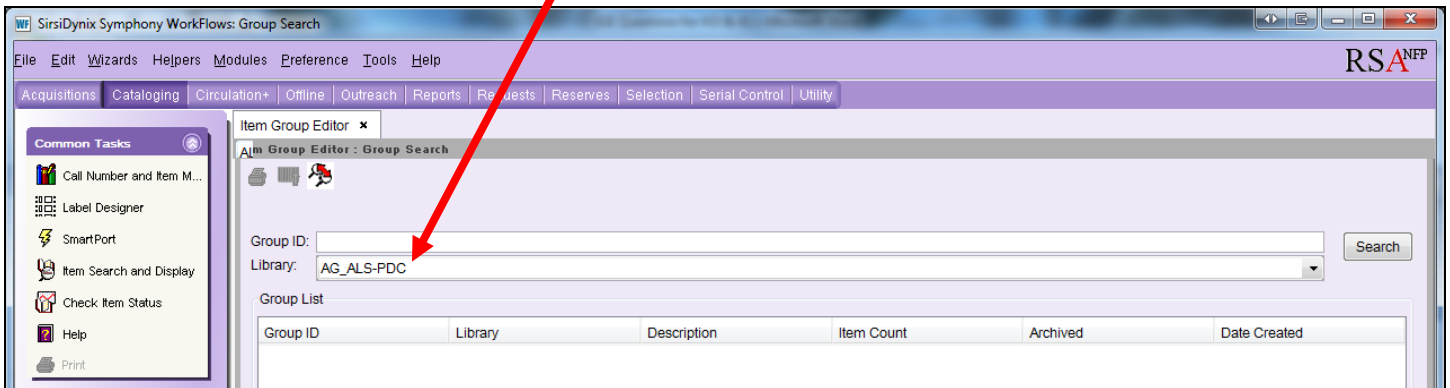
8. Click on the group you want to restore so that the group appears in blue:

9. Click the Manage Group button at the bottom.

The Manage Group screen will display a list of the items that are saved in that group:

10. Click the Restore Items button at the bottom.

    Important: The Restore Items button is only available for groups that have been archived. If the group was not archived, the Restore Items button will appear grayed out.

11. In the Confirmation pop-up box, click "Yes" to restore the edited fields to their original values for all items saved in the group.
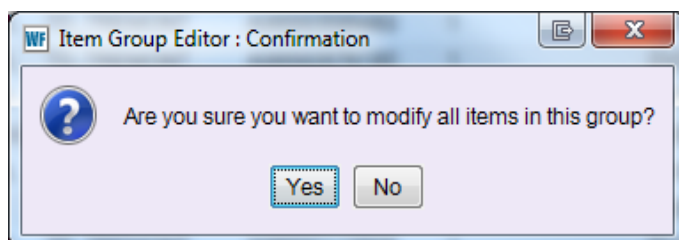
Depending on the number of items saved in the group, the item group editor may take a minute or two to modify the items.

Once the modifications are complete, the Restore Items Results window opens:
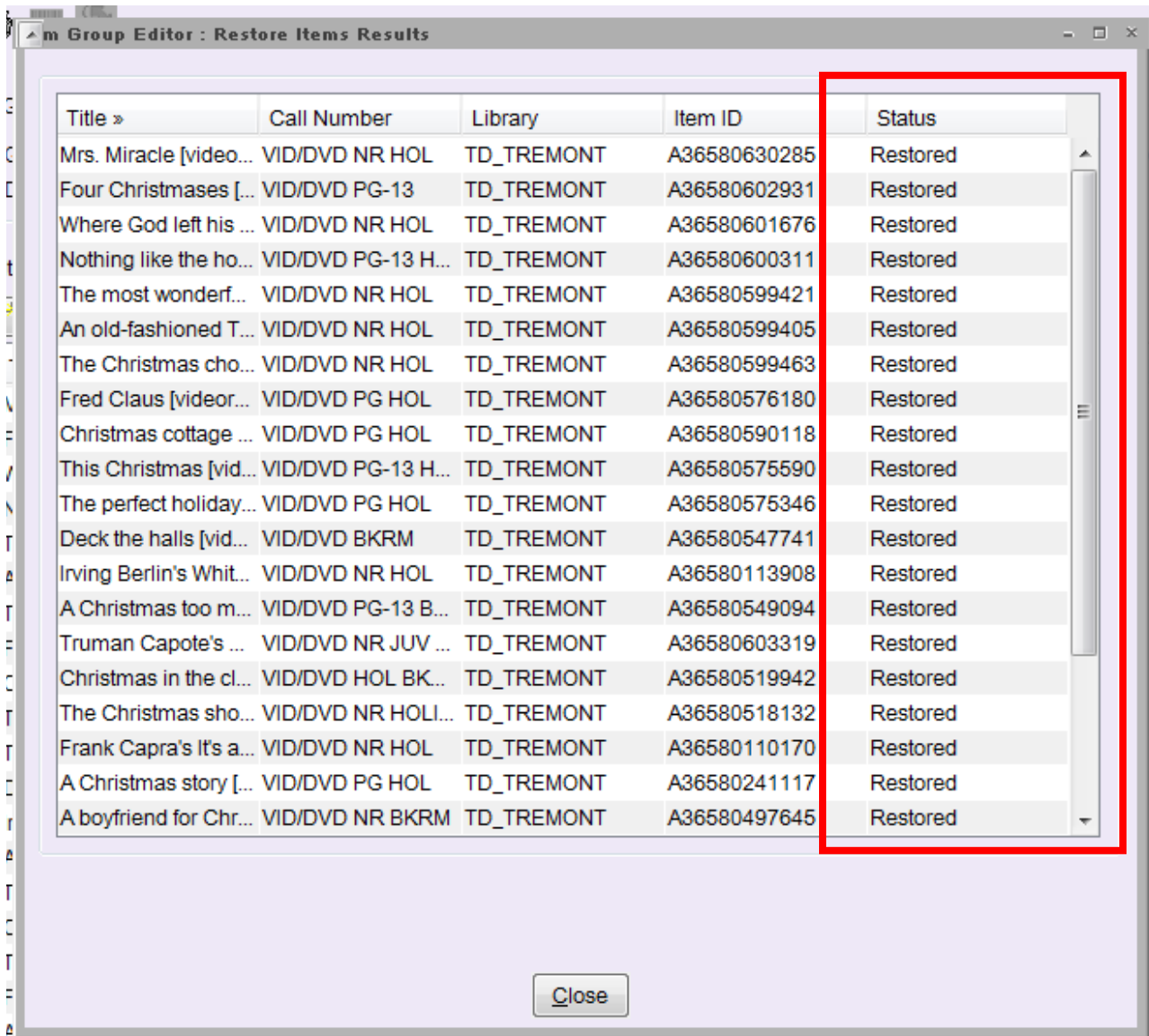
12. Scroll through the item list, and check the status column. Make sure "Restored" appears as the status.

    If "No Changes" appears as the status, this means that particular item was already assigned the values you selected to restore.

    If "Item not found in catalog" appears as the status, this means that the item was deleted from WorkFlows since it had been included in the group. The item group editor was unable to find the item in the database to restore it.

13. Click the Close button once you confirm the items were restored.

The updated Manage Group screen will appear. The items in the list will appear, restored to their original settings.

In the example below, the home location value for the DVDs has been restored to the original value -- HOLIDAY -- from the modified home location value of DISPLAY:

14. Click the Close button at the bottom.

Remember:
You are able to search for and display groups created by other RSA libraries. However, WorkFlows will only allow you to restore items in groups created by your library. If you try to restore items in another library's group, WorkFlows will display this status message: "Failed: You may not maintain this library's item information."

Deleting a Group

You can remove any group your library has saved in the item group editor wizard. Deleting a group *only* removes the group. The items still remain in WorkFlows, but they are no longer associated with that group in the item group editor wizard.

Once a group is restored to its original values or it is no longer needed, that group should be promptly removed from the item group editor wizard. Large numbers of groups saved in the item group editor may affect your ability to search for and display a list of all groups saved by your library.

Please use caution when deleting groups, as there is no way in WorkFlows to restore deleted groups.

Although you are able to search for and display groups created by other RSA libraries, WorkFlows will only allow you to delete groups created by your library.

1. Log into WorkFlows using your individual cataloging account or your library's TECH account if you have not yet been assigned an individual cataloging account.
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. The override pop-up box shown below will appear if you have not yet been assigned an individual cataloging account and are using the TECH account to access the item group editor wizard.

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 Supervisor, at erica.laughlin@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.

If you are using an individual cataloging account to access the item group editor wizard, please do not allow other staff members—either at your library or at other RSA libraries—to use your cataloging account to access the item group editor wizard.

6. After you enter the override password, the item group editor's advanced search screen opens.

Click the Item/Group Search helper button:

7. Search for the group you want to delete.

   Group Search Tip: To quickly retrieve a list of all groups created by your library, leave the Group ID field blank, select your WorkFlows code from the library menu, and click the Search button:

8. From the list of groups, click on the group to delete so that it appears in blue:
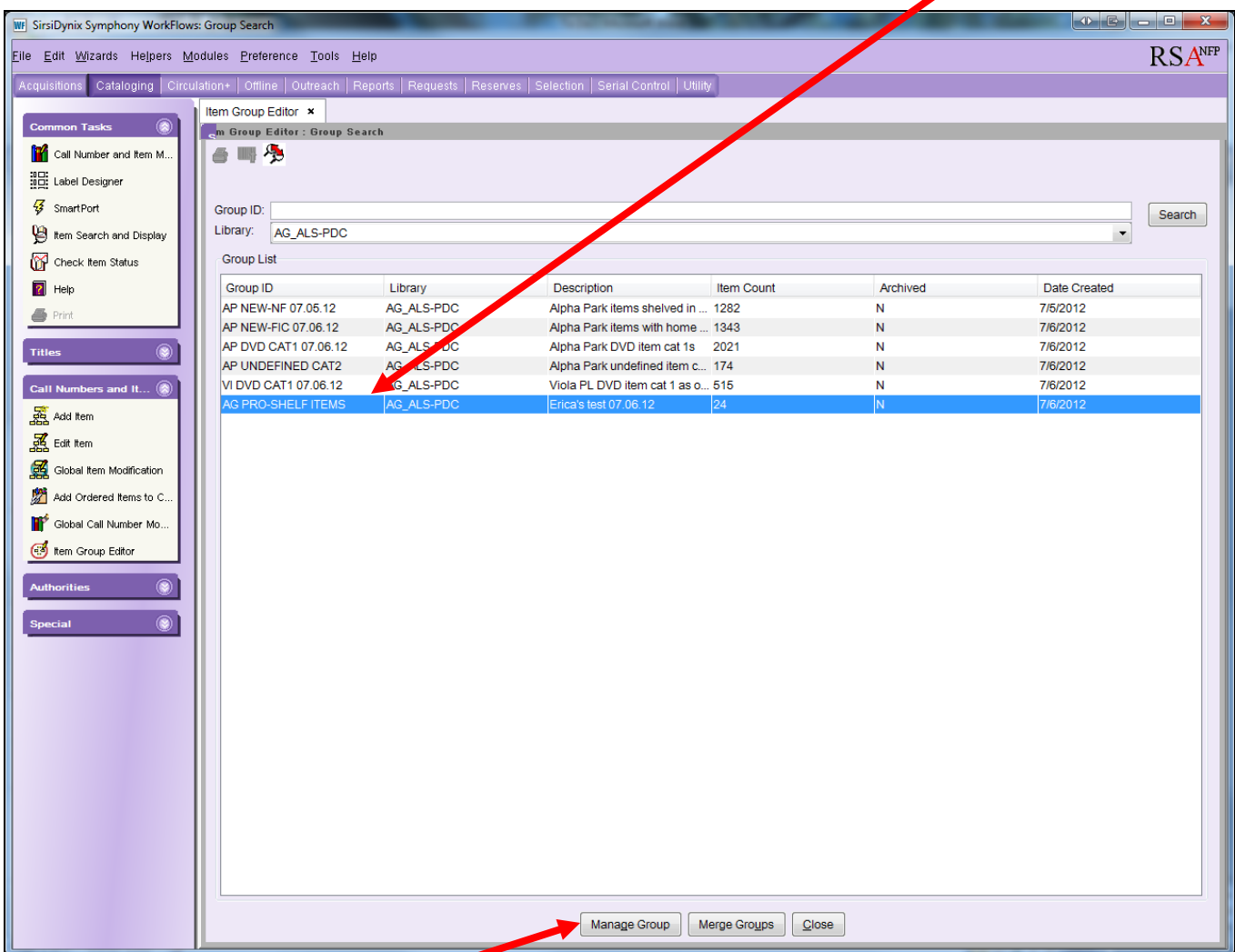
9. Click the Manage Group button at the bottom.

10. The group, along with a list of the items assigned to that group, will open. Check the group ID and description boxes at the top of the item list to verify the group displayed is the group you want to delete:

11. Click the Remove Group button at the bottom.

12. A pop-up box will appear, asking you to confirm the deletion:
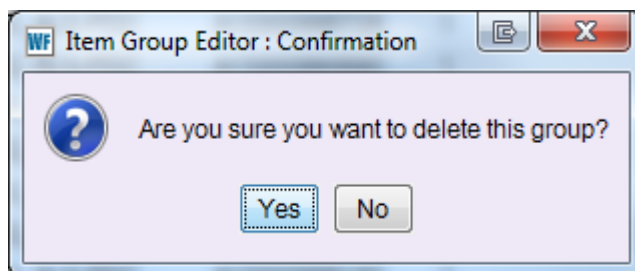
Click "Yes" to delete the group.

13. Another pop-up box will appear, confirming the group has been removed:
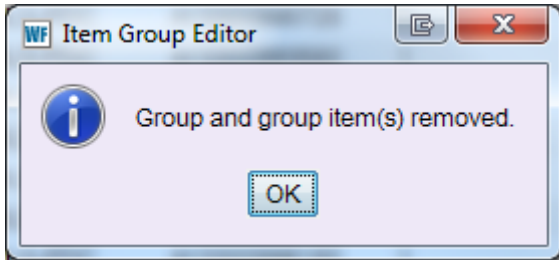
Click "OK" to close the removal confirmation box.

Remember:
Although this message confirms the group and its items have been removed, only the group your library saved in the item group editor wizard has been removed. The items that formerly belonged to the group you removed remain in WorkFlows.

If you need to delete the items, you will use the Delete Titles, Call Numbers, or Items wizard in WorkFlows. Instructions how to delete items are posted on the RSA web page at
http://alsi.sdp.sirsi.net/client/RSAwebsite/search/asset/462

Considerations When Searching for Recently Modified Items

The considerations discussed below apply when searching for items that were edited in either an unsaved list or as part of a saved group in the item group editor wizard.

Searching for recently modified items in the item group editor wizard *only***:**
As soon as items are modified in the item group editor, the modified value(s) will immediately take effect for searching in the item group editor wizard, provided you selected the "update dynamic indexes" option in the "Setting Item Group Editor Wizard Properties" section of this guide. If you modify items in the item group editor and then re-search for those items using the value(s) you just modified, the item group editor will retrieve the recently edited items if your item group editor wizard is configured to update dynamic indexes.

If you did not select the dynamic indexing option in the item group editor wizard's properties, the recently modified value(s) will not be retrieved if you search for them in the item group editor. An "item not found in catalog" message will appear after you perform the search. Overnight the WorkFlows Rebuild Item Database report will index the modified items so they are visible the next day if you search for them in the item group editor wizard.

In order to ensure search-ability of modified items in a timely manner, RSA recommends selecting the property to update dynamic indexes.

Searching for recently modified items in WorkFlows wizards *other than* **the item group editor:**
If you search for an item you just modified using any WorkFlows wizard *other than the item group editor* (e.g., Item Search & Display, Check Item Status, Call Number & Item Maintenance, etc.), WorkFlows will retrieve the recently modified item. Those items retrieved by your search should appear assigned the values you just modified using the item group editor wizard. The WorkFlows dynamic indexer immediately processes the modified items so they are searchable in the various WorkFlows wizards.

Searching for recently modified items in the RSACat:
The modified items, with their newly assigned values, are visible in the RSACat soon after you change them in the item group editor wizard.

Running reports of recently modified items in Web Reporter:
Modifications made to items using the item group editor are not immediately visible in Web Reporter. The WorkFlows Rebuild Item Database report will update Web Reporter overnight. The modifications you made to items using the item group editor the day before will only be visible in Web Reporter the following day.

Once Web Reporter is updated the next day, you may find it helpful to run a report that lists any items still assigned the original value(s)—i.e., the value(s) that you changed to a *different* value using the item group editor wizard. This report will allow you to easily determine if modification of any items is still needed. For assistance using Web Reporter, please contact the RSA Help Desk at rsahelp@railslibraries.info or 1-866-940-4083.

Running reports of modified item categories 3, 4, and 5 in WorkFlows
Please remember if you would like any reports of your library's progress assigning item categories 3, 4, or 5 to its collection, RSA staff must run those reports for you in WorkFlows. Reports for item categories 3, 4, and 5 are unavailable in Web Reporter.

Modifications made to items using the item group editor are immediately visible on WorkFlows reports.

Searching for recently *shadowed* items in the item group editor wizard, other WorkFlows wizards, and the RSACat:
Modifications involving the shadow property in the item group editor do not take effect until the next day, after the WorkFlows indexing report runs overnight. The shadow property you modified using the item group editor will immediately display on the item's record, but a search for that shadowed item will continue to perform as though you had not changed that item's shadow property. In other words, if you shadowed the item using the item group editor, the item's "shadow" property check box will immediately appear selected, but the item will still be visible in WorkFlows and RSACat searches until the following day.

Appendix: Creating a Smaller List of Item IDs to Upload into the Item Group Editor

1. Follow steps 1-12 in the section "Using Web Reporter to Generate a List of Item IDs" in the WorkFlows item group editor guide.

2. Once you have deleted *all* columns and rows so that *only* the list of item IDs remains on the spreadsheet, highlight those item IDs you want to upload into the WorkFlows item group editor to modify.
   - Tip: To quickly highlight multiple item IDs in the spreadsheet, simultaneously press the shift key and the down arrow on your keyboard.

3. Right click anywhere on the highlighted list of item IDs. Select Copy:
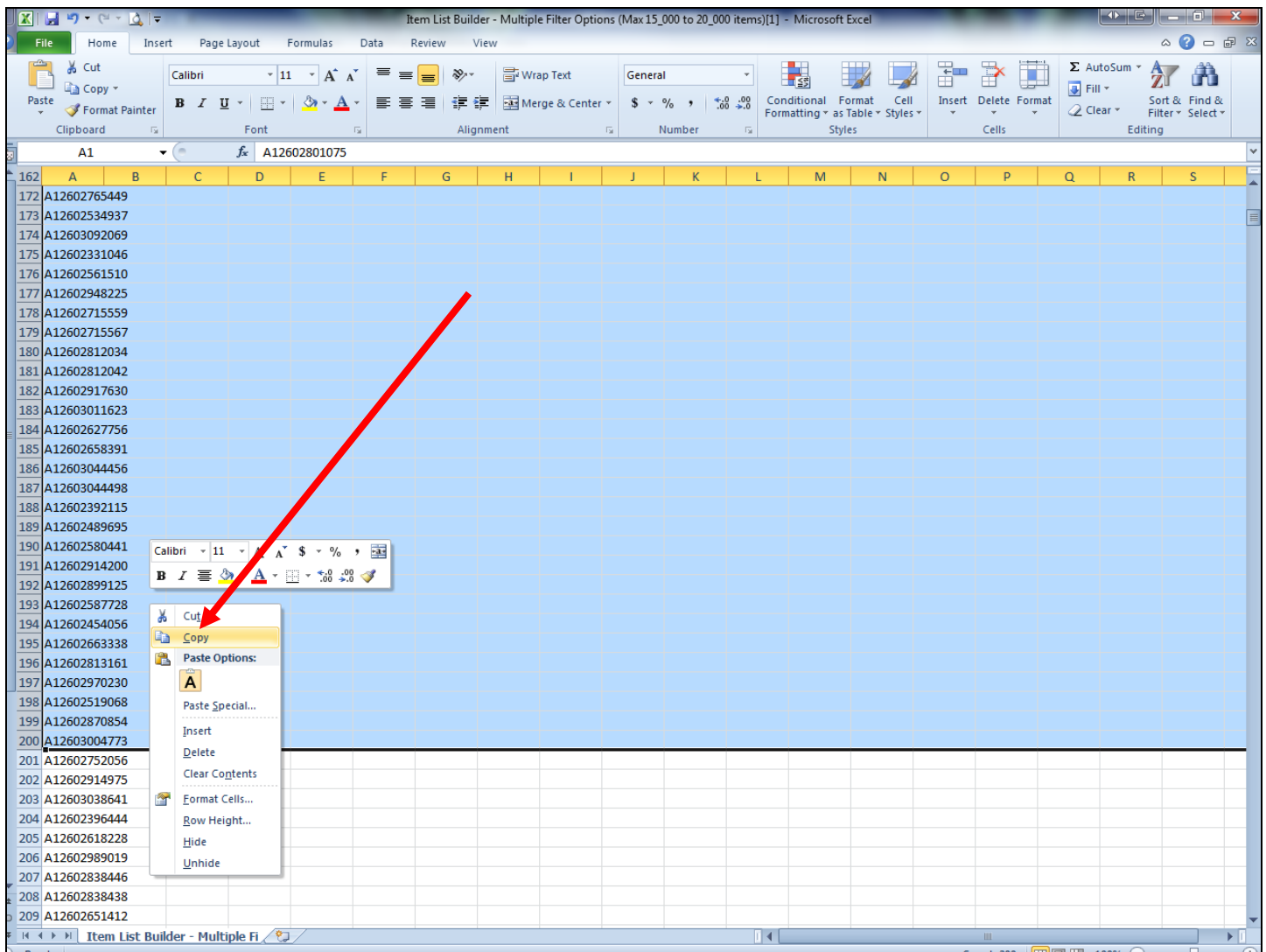
4. Go to the File menu in the left corner of the spreadsheet. Select "New":
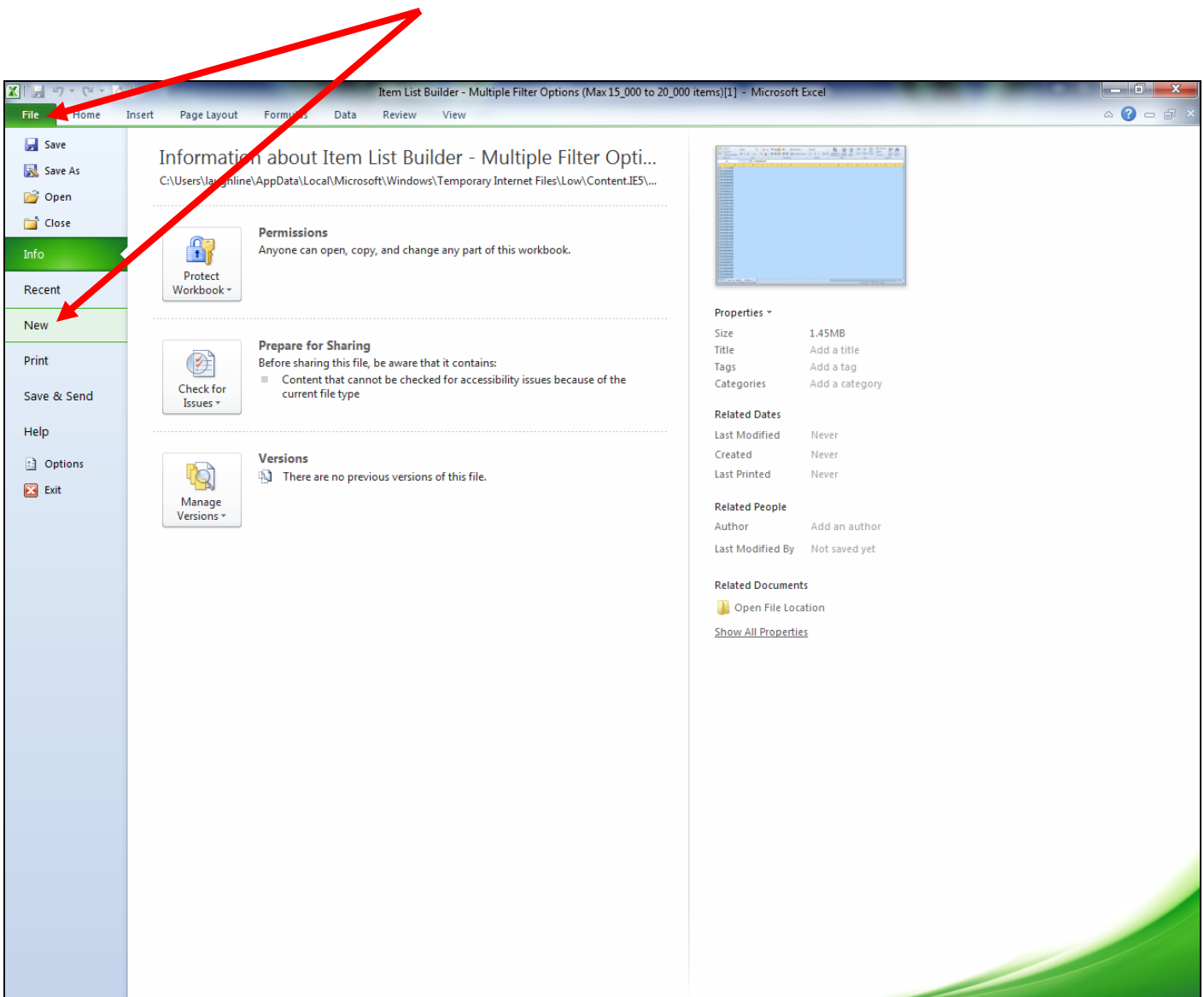
5. On the available templates screen, double click on the option "Blank workbook":

6. A blank spreadsheet will open. Click on the first cell:
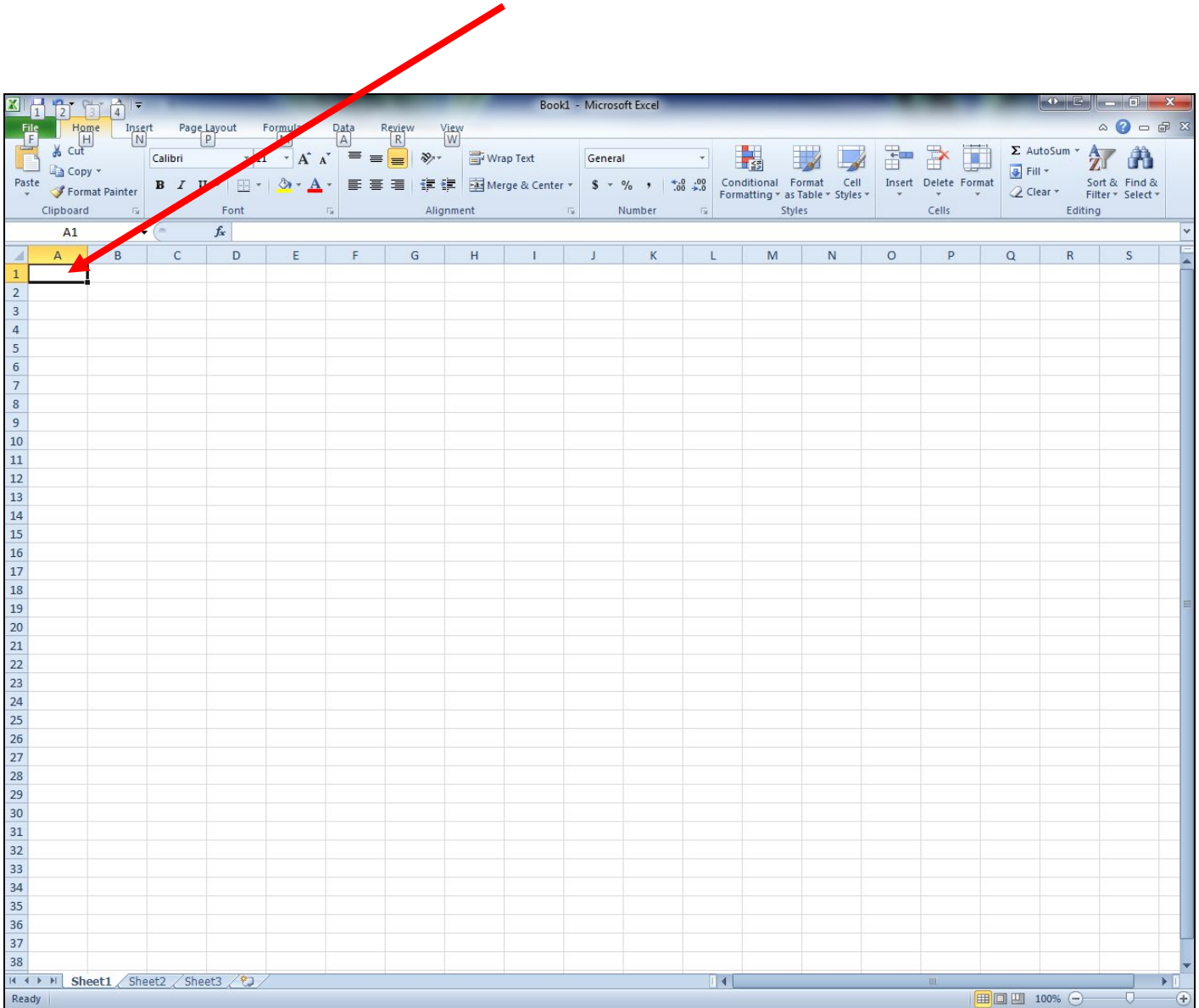
7. Right click on the first cell and select "Paste."

   If there is more than one "Paste" option in the menu, select the clipboard icon:
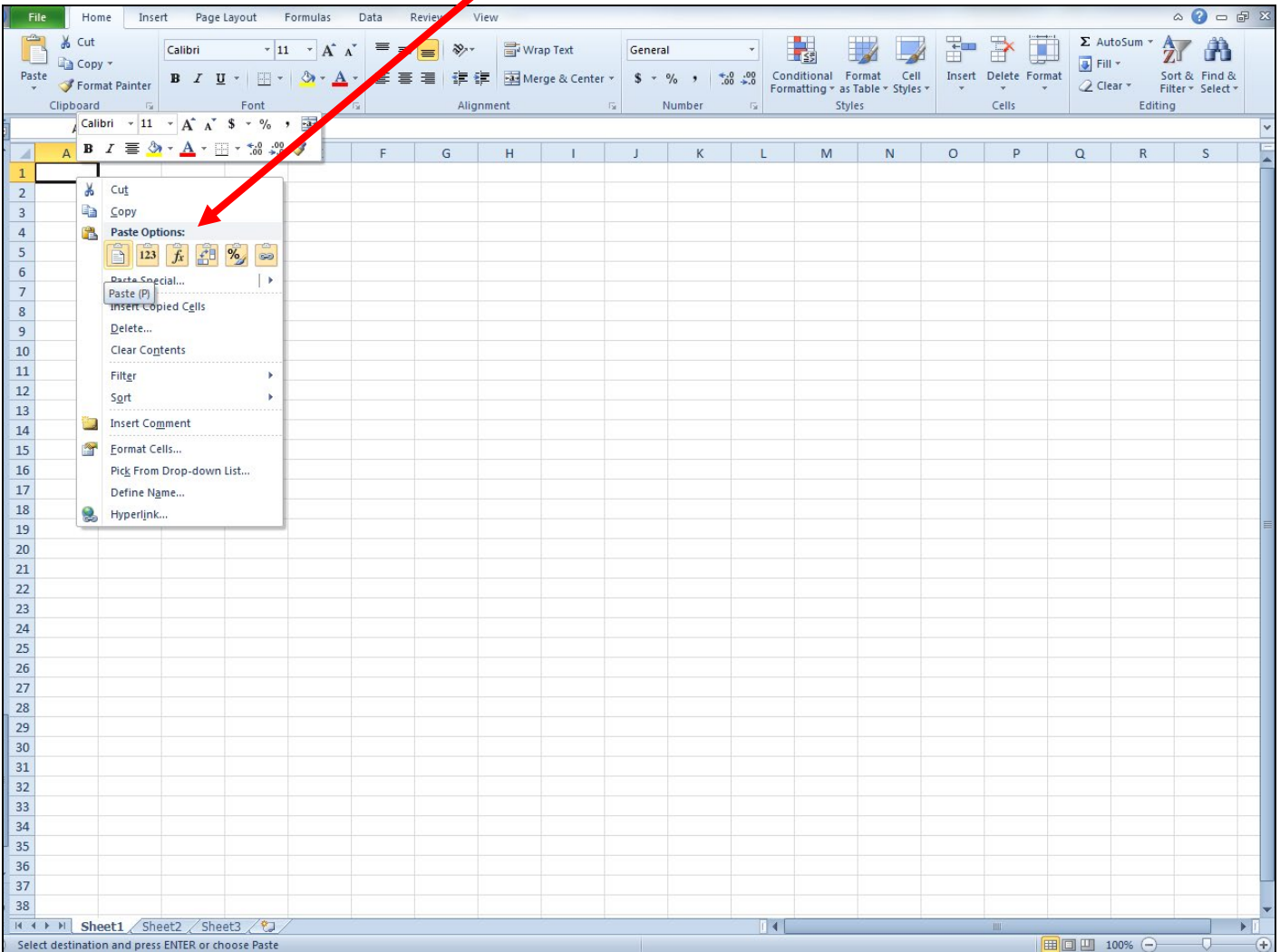
8. The shortened list of item IDs should appear in the new spreadsheet:
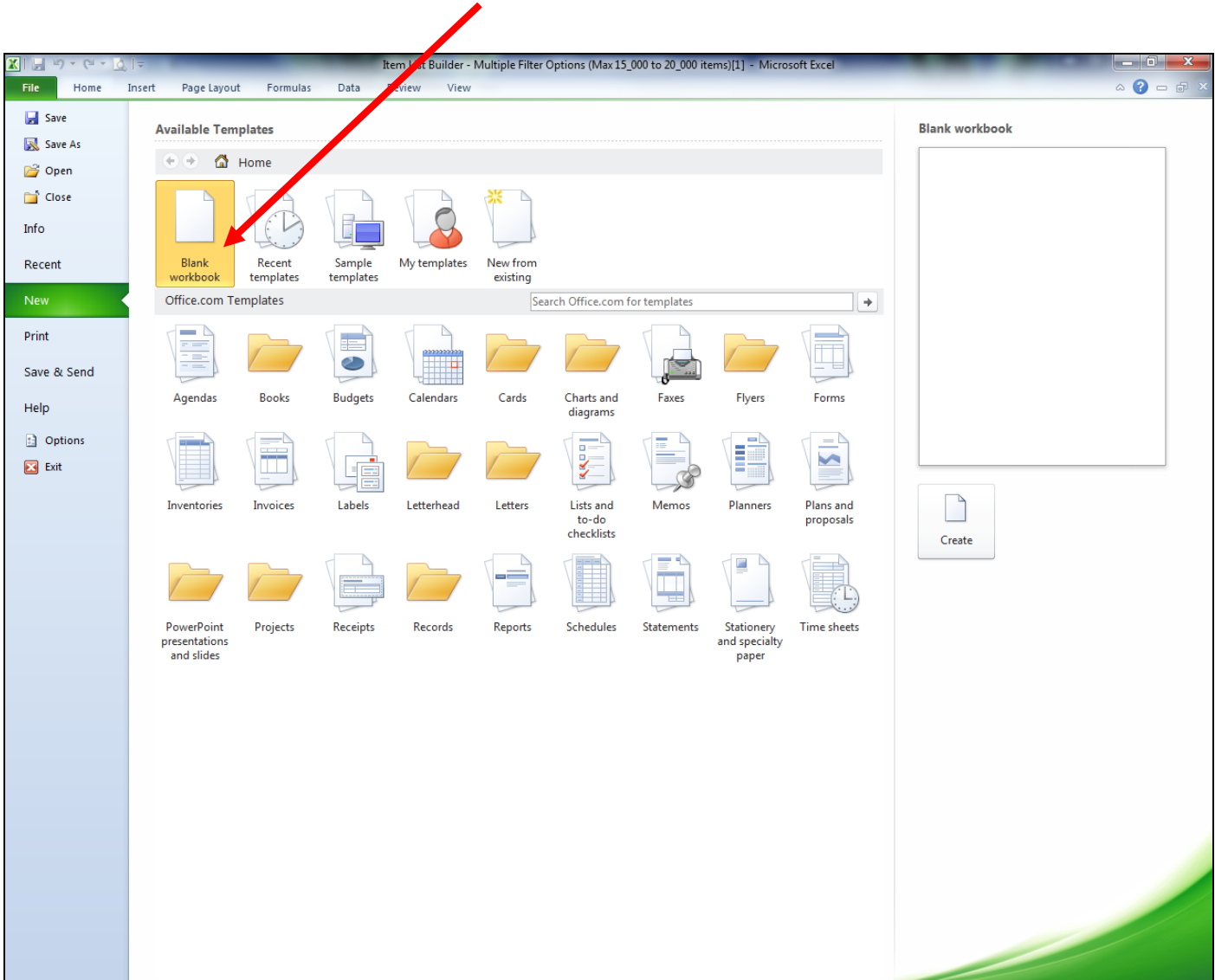

9. Save the spreadsheet as a text tab delimited file, following steps 13-15 in the section "Using Web Reporter to Generate a List of Item IDs" in the WorkFlows item group editor guide.

Questions?

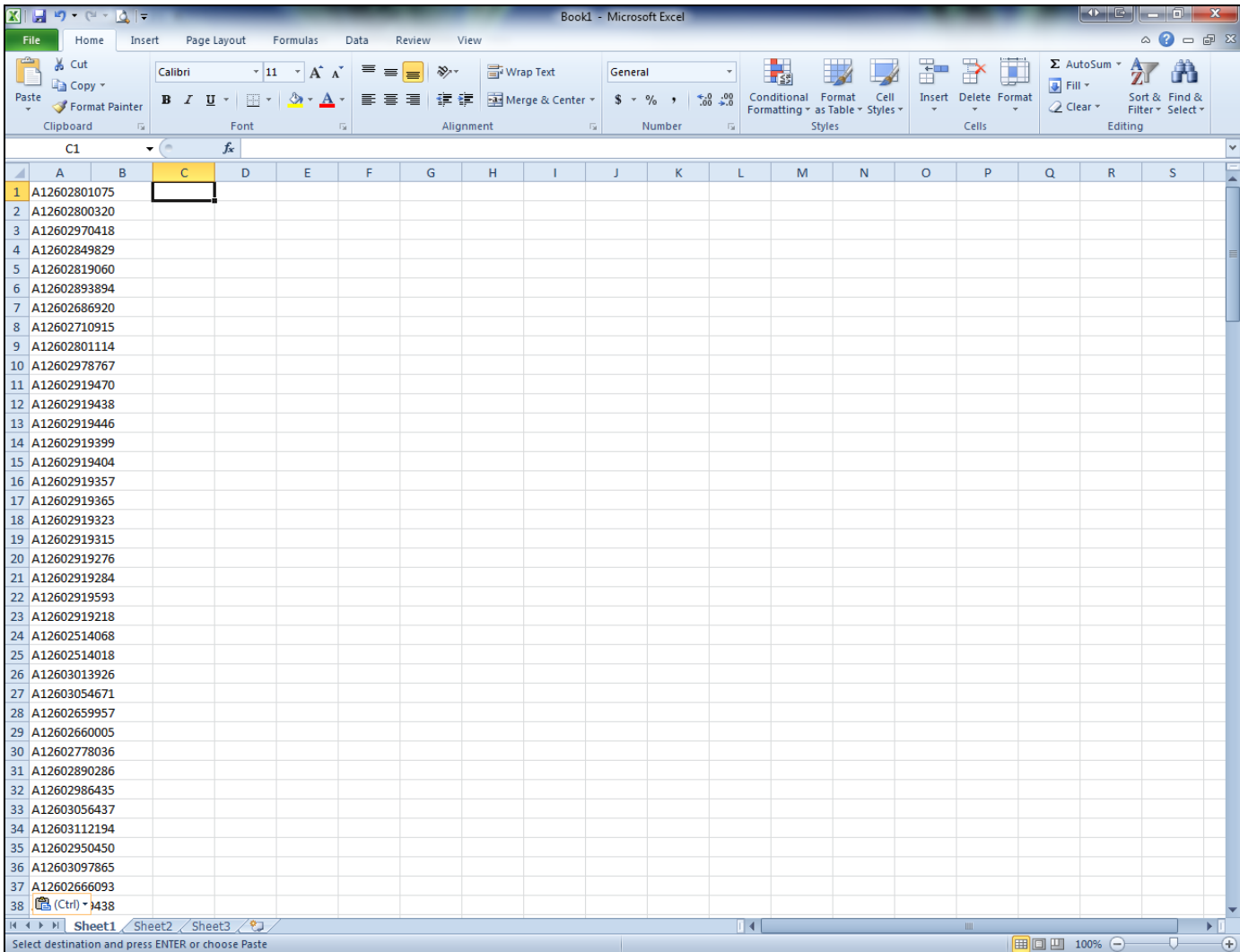**For questions regarding how to use the WorkFlows item group editor wizard:**

Erica Laughlin, RSA Cataloging and Database Supervisor
Send an email to Erica directly (erica.laughlin@railslibraries.info) or
to the RSA Help Desk (rsahelp@railslibraries.info) and direct it to Erica's attention.
Call RSA toll-free at 1-866-940-4083 and ask to speak to Erica.

For requests to add or remove cataloging parameters from your WorkFlows drop-down menus:

Amanda Gray, RSA Member Services Specialist
Send an email to the RSA Help Desk (rsahelp@railslibraries.info) and direct it to Amanda's attention.
Call RSA toll-free at 1-866-940-4083 and ask to speak to Amanda.

For questions regarding how to run reports of your library's collection:

Kendal Orrison, RSA Director
Send an email to the RSA Help Desk (rsahelp@railslibraries.info) and direct it to Kendal's attention.
Call RSA toll-free at 1-866-940-4083 and ask to speak to Kendal.

**For questions regarding how to update the WorkFlows software or
to schedule a "bulk quantity edit day":**

James Campbell, RSA System Supervisor
Send an email to the RSA Help Desk (rsahelp@railslibraries.info) and direct it to James's attention.
Call RSA toll-free at 1-866-940-4083 and ask to speak to James.