



## Item Group Editor Procedure

**Last updated: November 25, 2024**

This procedure is available here: <https://support.librariesofrsa.org/project/instructions-for-the-workflows-item-group-editor-wizard/>

**Questions?** Please contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.

## Contents

Overview of the WorkFlows Item Group Editor Wizard.....	3
Before You Begin Using the Item Group Editor Wizard .....	5
Checking Your WorkFlows Version Number .....	6
Enabling Multiple Windows Mode & Tabbed Windows in WorkFlows .....	8
Setting Item Group Editor Wizard Properties .....	14
Searching for Multiple Items .....	18
Searching for Items Assigned Cataloging Codes No Longer in Your WorkFlows Menu.....	26
Searching for a Single Item.....	33
Printing Items in the Item List .....	37
Editing an Unsaved Item List .....	41
Verifying Edits to Items .....	49
Saving an Item List as a Group.....	54
Finding a Group.....	61
Exporting a Group .....	64
Adding Items to a Saved Group .....	74

Removing Items from a Saved Group .....	81
Editing Items Saved as a Group .....	86
Restoring Items in a Group to Their Original Values.....	94
Deleting a Group .....	100
Considerations When Searching for Recently Modified Items .....	105

## Overview of the WorkFlows Item Group Editor Wizard

All 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. When you participate in training, RSA will configure item group editor access into your individual cataloger account. Please do not allow other staff members to use your cataloging account to access the item group editor wizard.

**All library staff who plan to use the item group editor must be subscribed to and regularly monitor the RSA Announcements, Public/Academic/Special/School, and Cataloging email groups.** These email groups will be the communication mechanism for RSA staff to share important information about the item group editor wizard, such as indexing issues. To subscribe to the RSA Announcements, Public/Academic/Special/School, and Cataloging email groups, please fill out and submit this form: <https://form.jotform.com/RSAnfp/rsa-email-groups>. Library staff are also subscribed to these forums after completing item group editor training. If staff are already subscribed, duplicate subscriptions will not result.

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. 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 (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 BLUEcloud Analytics (BCA). The item group editor is particularly helpful in identifying inconsistencies in how your collection is cataloged.

The item group editor wizard also includes the option to upload a list of item IDs that all need the same edit(s) performed on them. When the list is uploaded, the item group editor will search WorkFlows and retrieve the item IDs listed in the file. Then the items can be batch edited in item group editor. Please reach out to the RSA Help Desk to learn more about this option as it is not discussed during training.

The item group editor wizard has another 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.

**Each RSA 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 issues the following day.

RSA staff may periodically schedule days for RSA libraries to perform edits to their collections that involve larger numbers of items than the 5,000 items per day limit that is usually in effect. If implemented, these “bulk 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 edit day” for a special project involving your collection, please contact James Campbell, the RSA System Supervisor, at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.

Batch editing requests for library users should also be submitted to James, as the WorkFlows item group editor wizard only has the capability to modify items—not users.

The item group editor is unable to batch edit call numbers. Batch editing requests for call numbers should be submitted to Erica Laughlin, the RSA Cataloging & Database Supervisor, at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.

## 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:

- Does your library currently use the home location code STACKS, but you would prefer to use more specific home locations, such as FICTION, NONFICTION, J-EASY, etc., to make materials easier to find and provide more specific collection statistics?
- Does your library have quite a few books or DVDs assigned a “new” item type code (e.g., N-BK or N-DVD) 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 1 code UNDEFINED to many of its materials, and UNDEFINED needs to be changed to FICTION, NONFICTION, or EQUIPMENT?
- Has your library assigned the item category 2 code UNDEFINED, which needs to be edited to the appropriate reading level (adult, young adult, or juvenile)?
- Are mystery, romance, science fiction, or other genres popular in your collection? If so, assigning item category 4 codes would improve searching for patrons in the RSAcat, as well as statistics for how your collection is being used.

You can use BLUEcloud Analytics 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 submit an RSA report request:

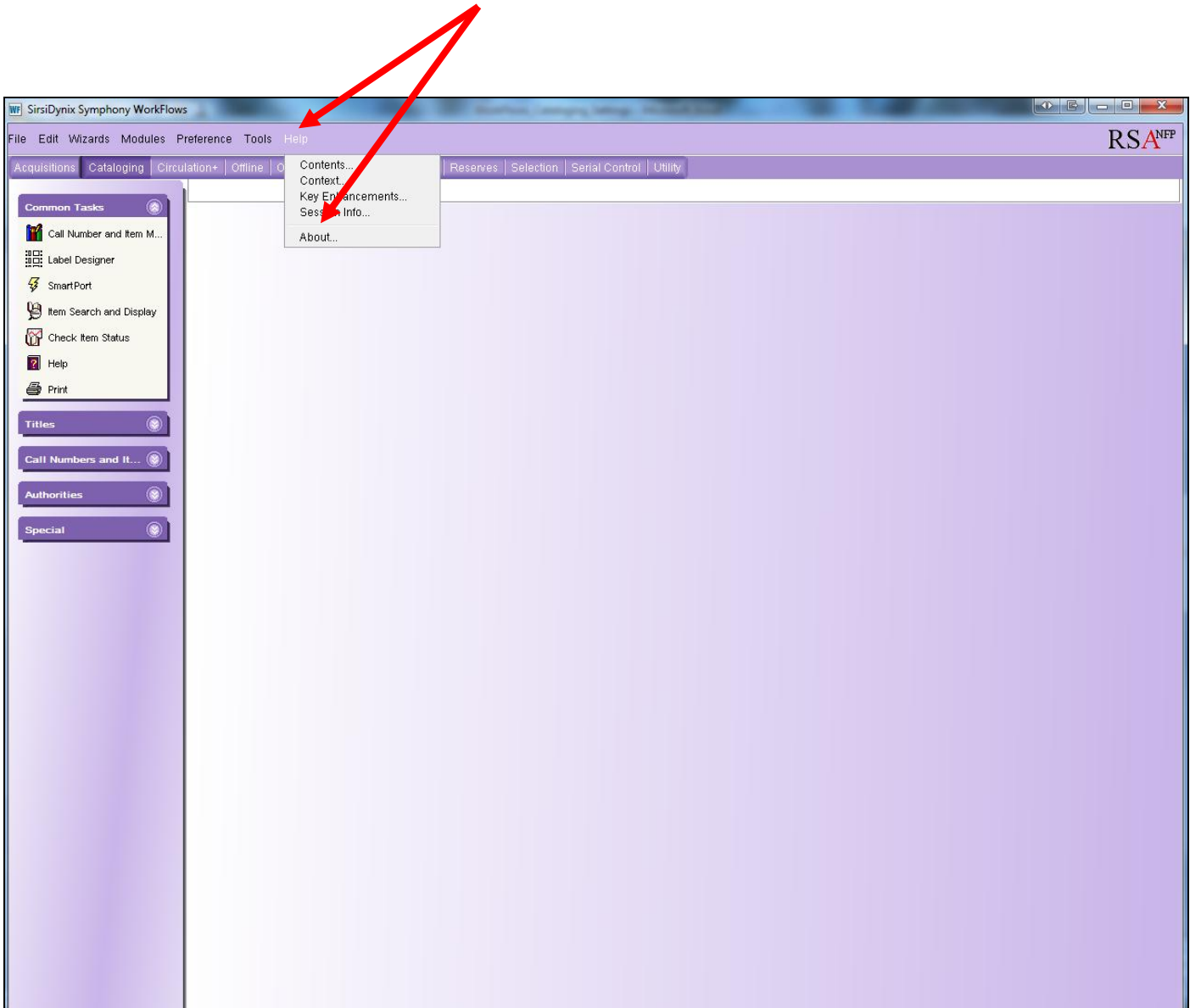
<https://support.librariesofrsa.org/project/report-request-forms/>.

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.

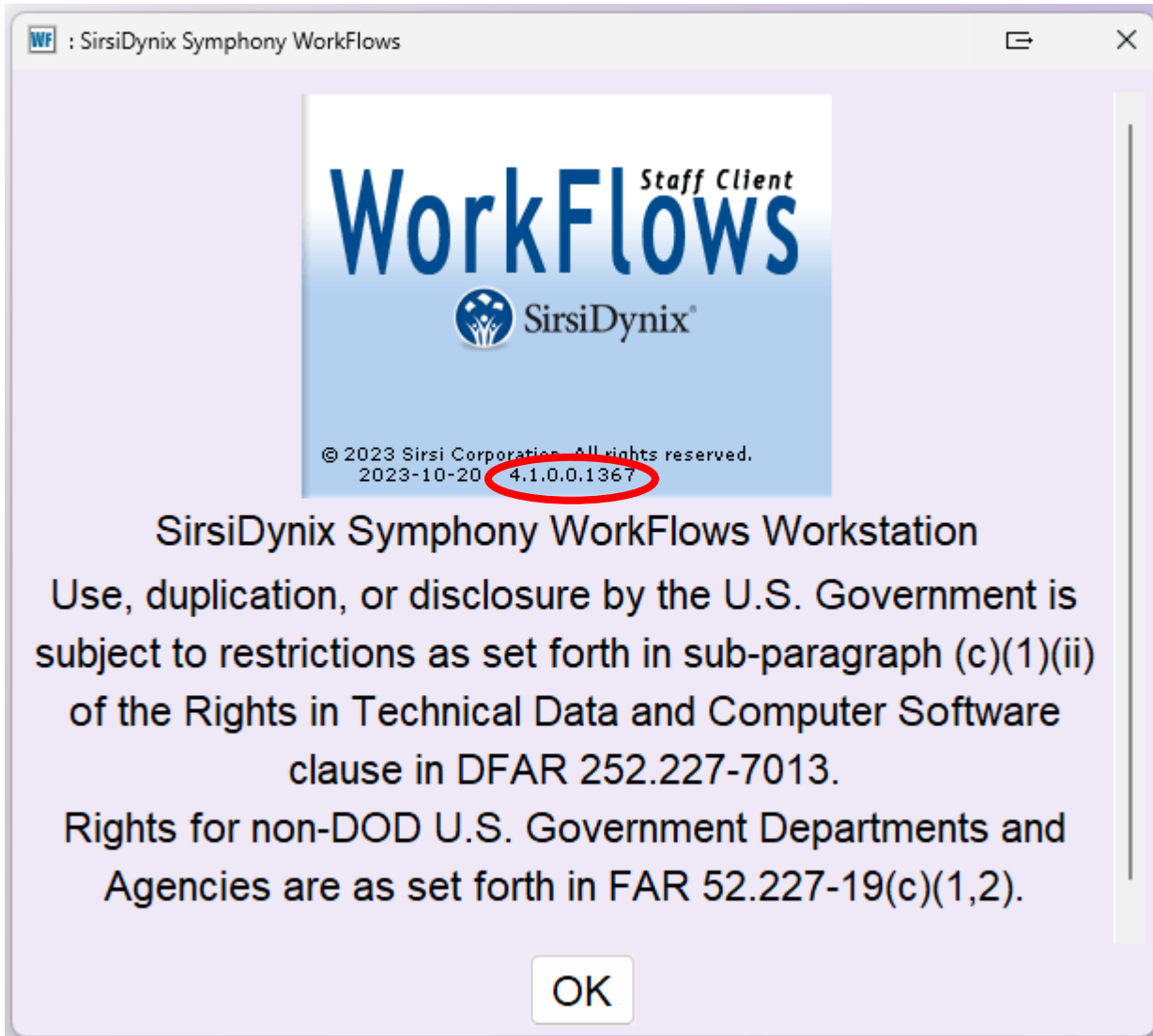
## Checking Your WorkFlows Version Number

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 4.1.0.0.1367 is installed on that computer.

1. Log into WorkFlows using your 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): 4.1.0.0.1367
5. If version number 4.1.0.0.1367 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* 4.1.0.0.1367 appears in the pop-up box, you must update your WorkFlows. The WorkFlows installation files for the most recent version of the software are posted here: <https://support.librariesofrsa.org/project/downloads-setup/>.

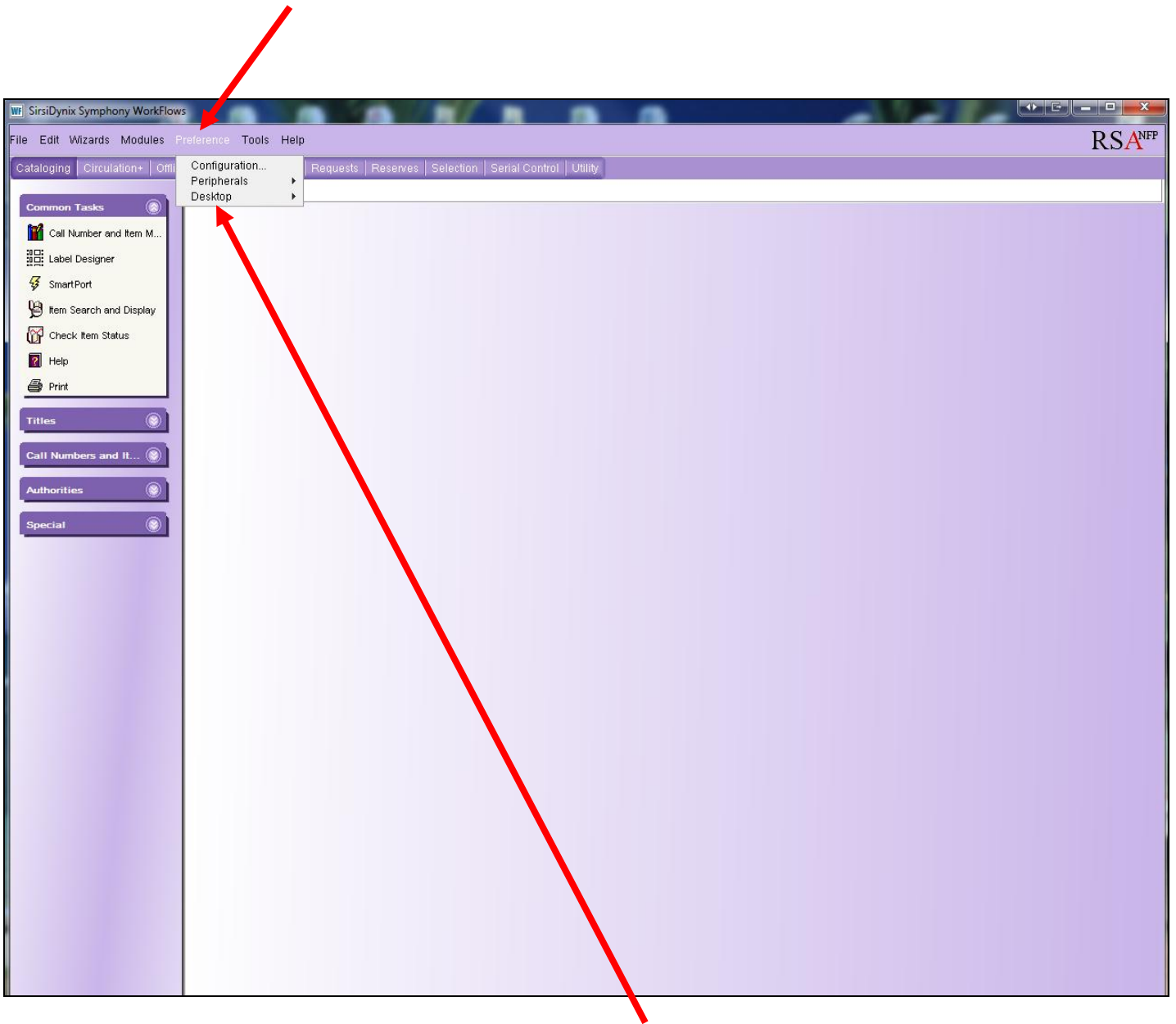
If you need assistance updating WorkFlows, please contact James Campbell, the RSA System Supervisor, at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.

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.

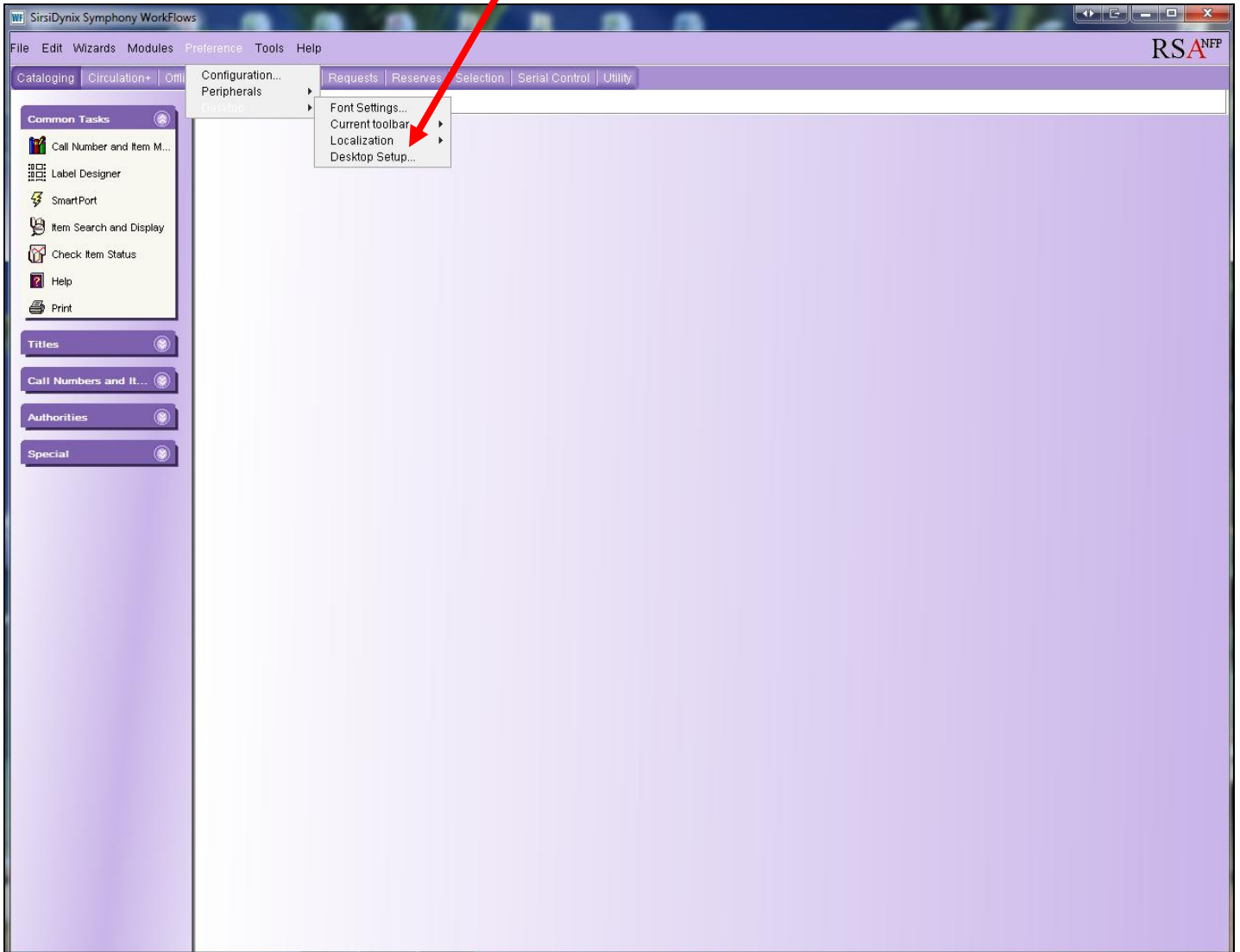
1. Log into WorkFlows using your individual cataloging account.
2. Go to the Preference menu at the top.



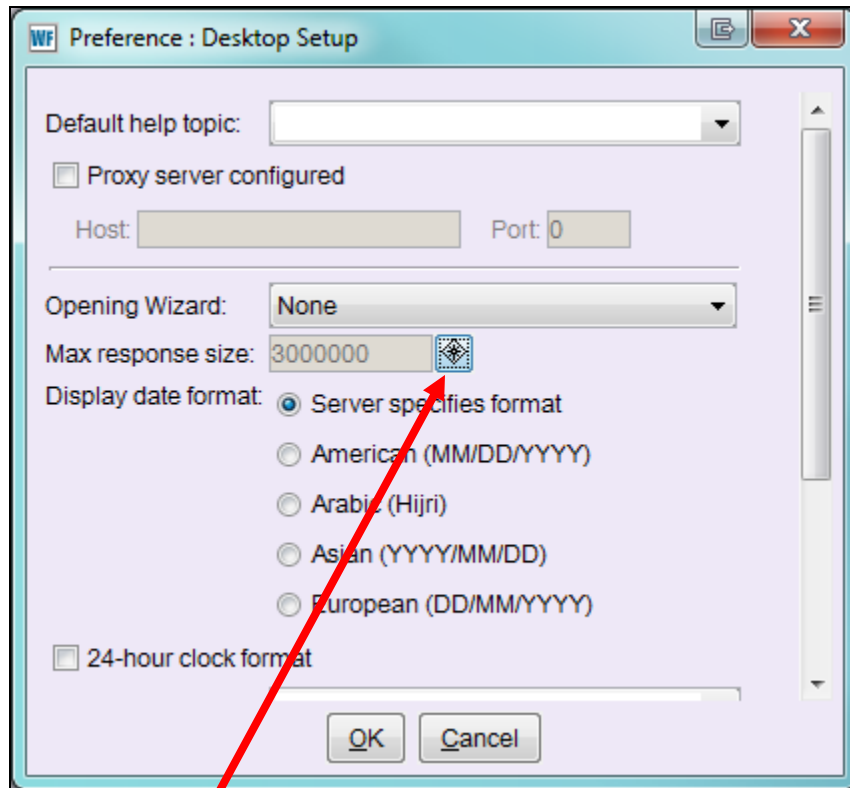
3. From the Preference menu, click on "Desktop."



4. From the next menu, click on “Desktop Setup...”

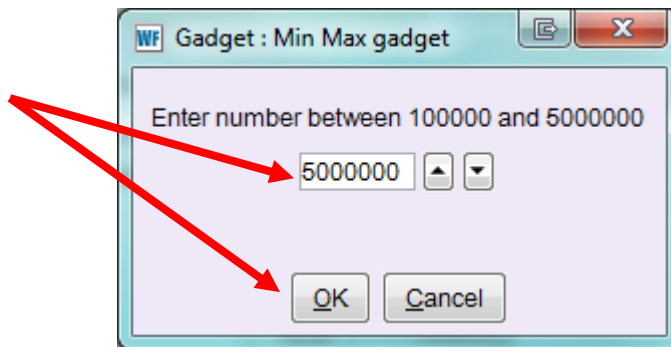


A Desktop Setup box appears:



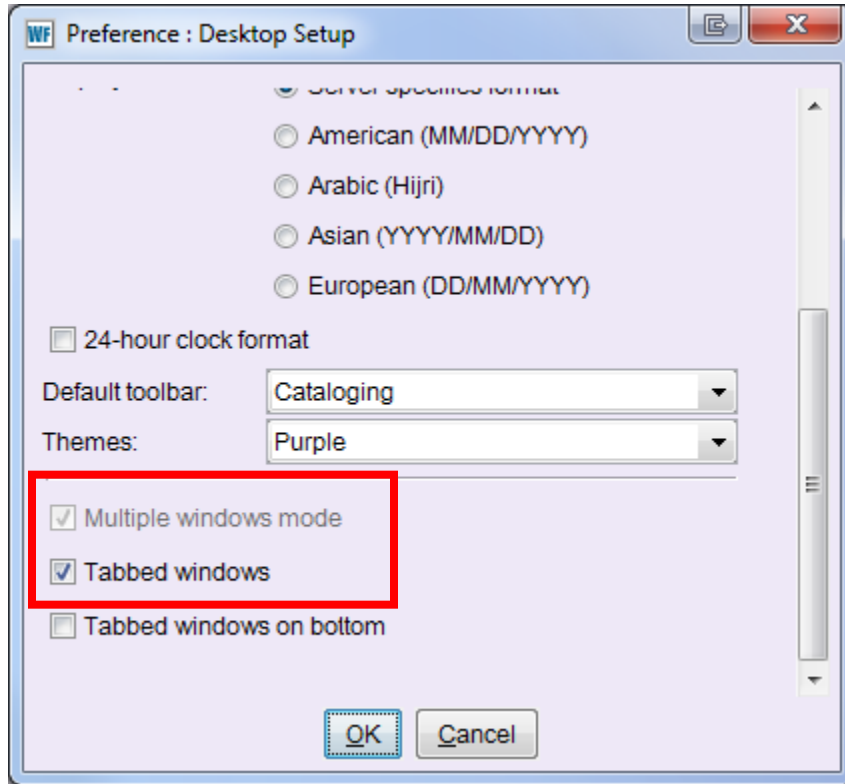
5. Click the gadget next to the max response size box.

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.



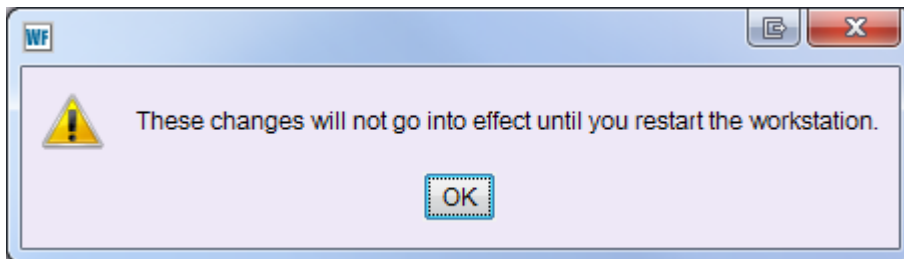
8. Check the box next to “Multiple windows mode.”

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.”

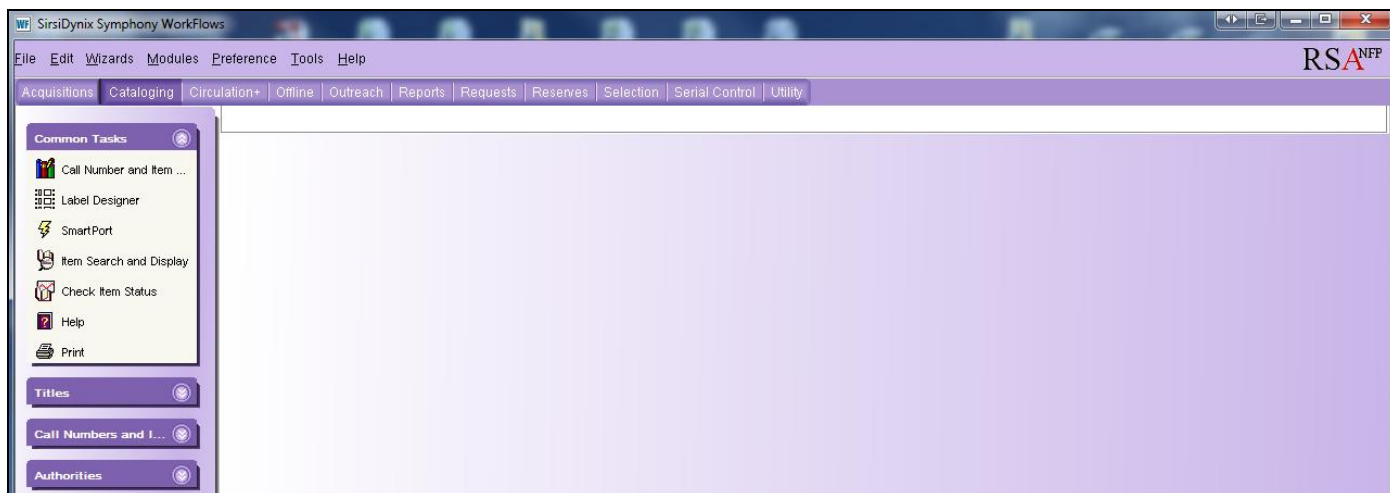
10. Once you enable multiple windows mode and tabbed windows, click OK to close the Desktop Setup box.

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

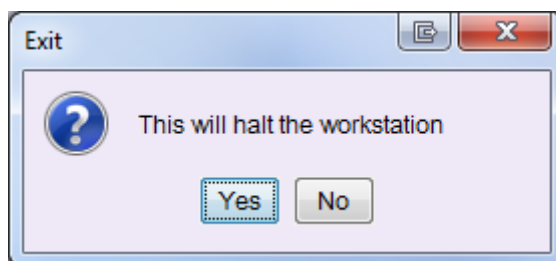


Click OK to close the box.

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”:



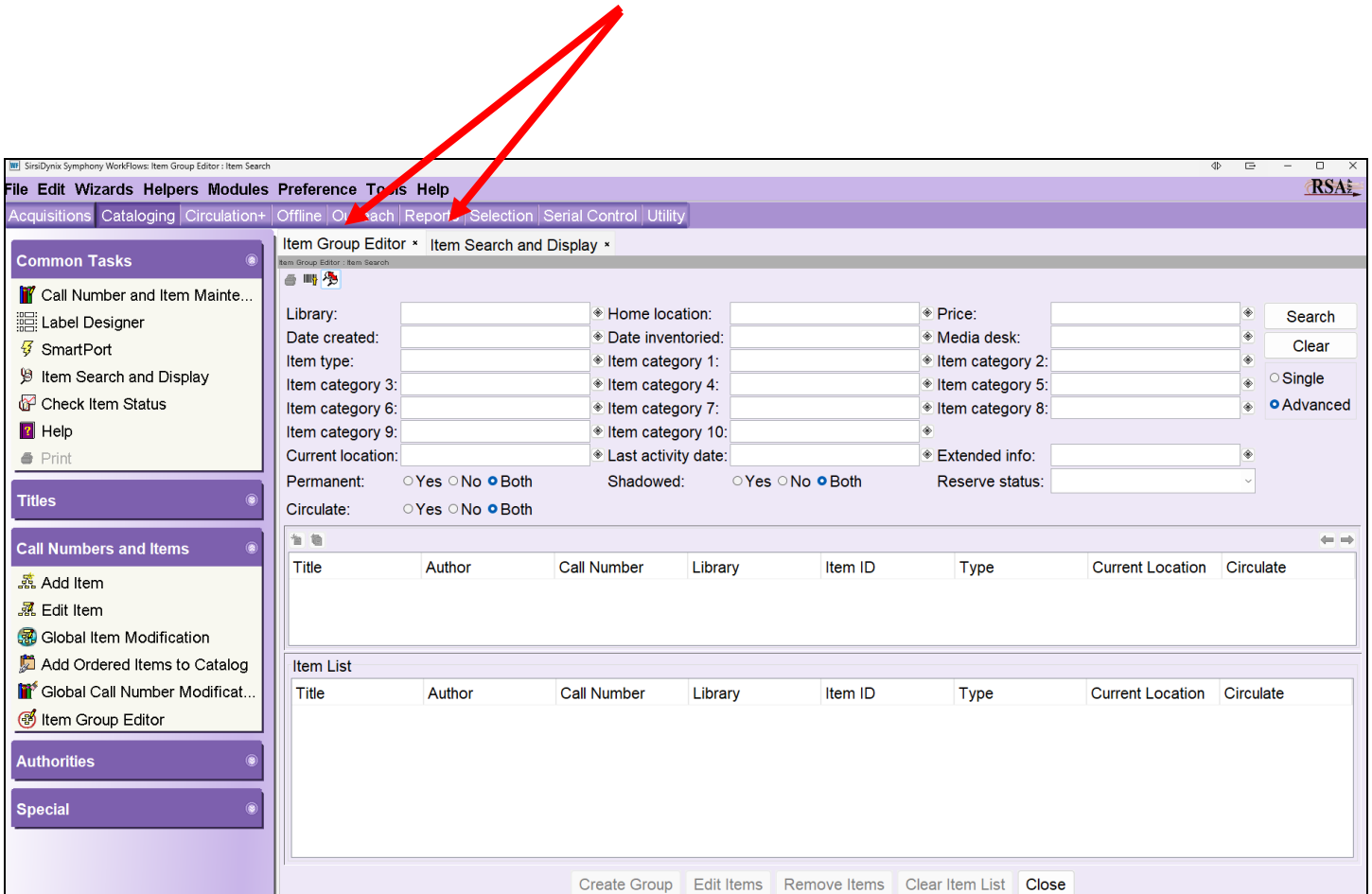
Click Yes.

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 individual cataloging account.

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.

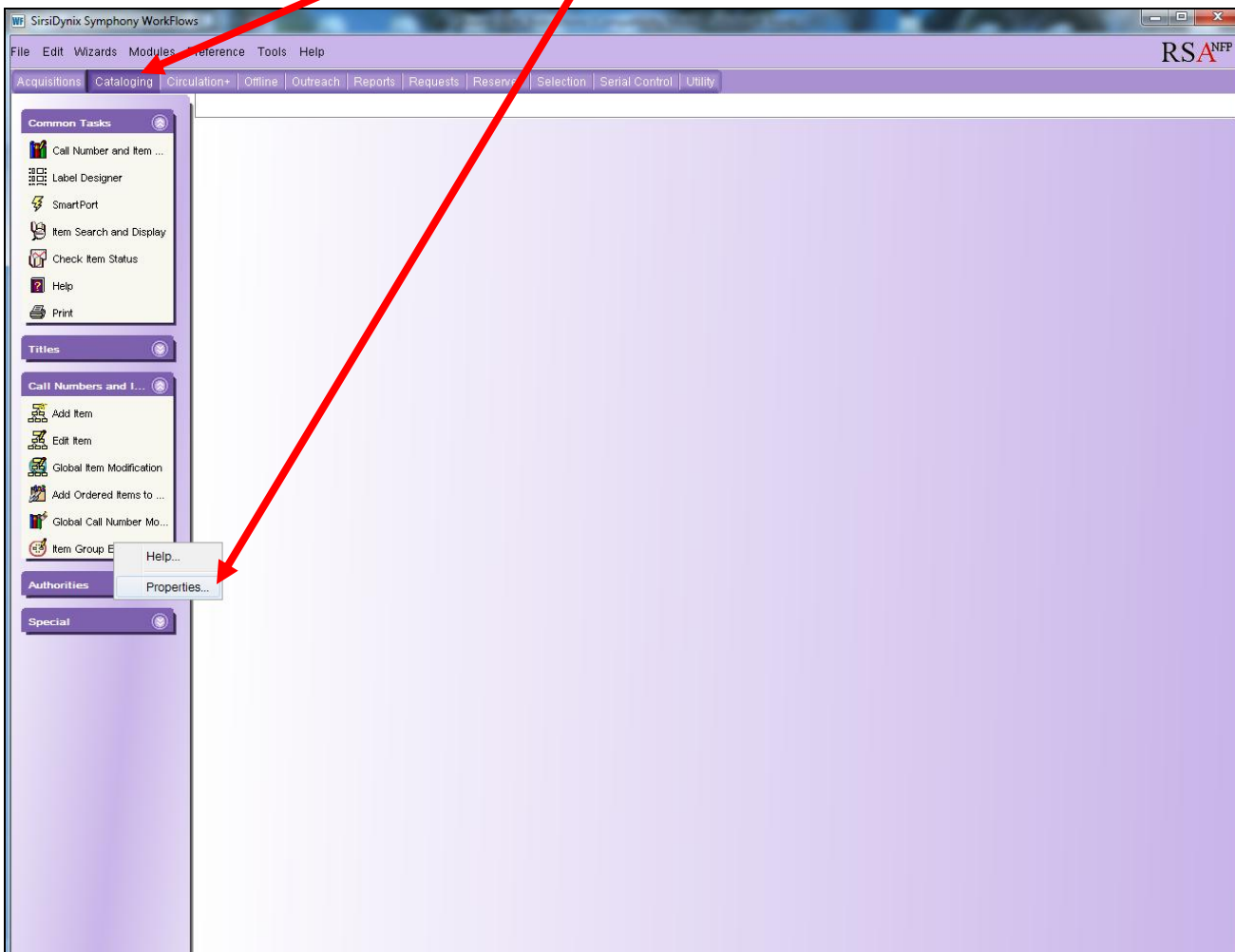
The following screen shot shows WorkFlows with multiple windows mode and tabbed windows enabled to display at the top of the WorkFlows screen. The item group editor and the item search and display wizards are simultaneously open in the screen shot below.



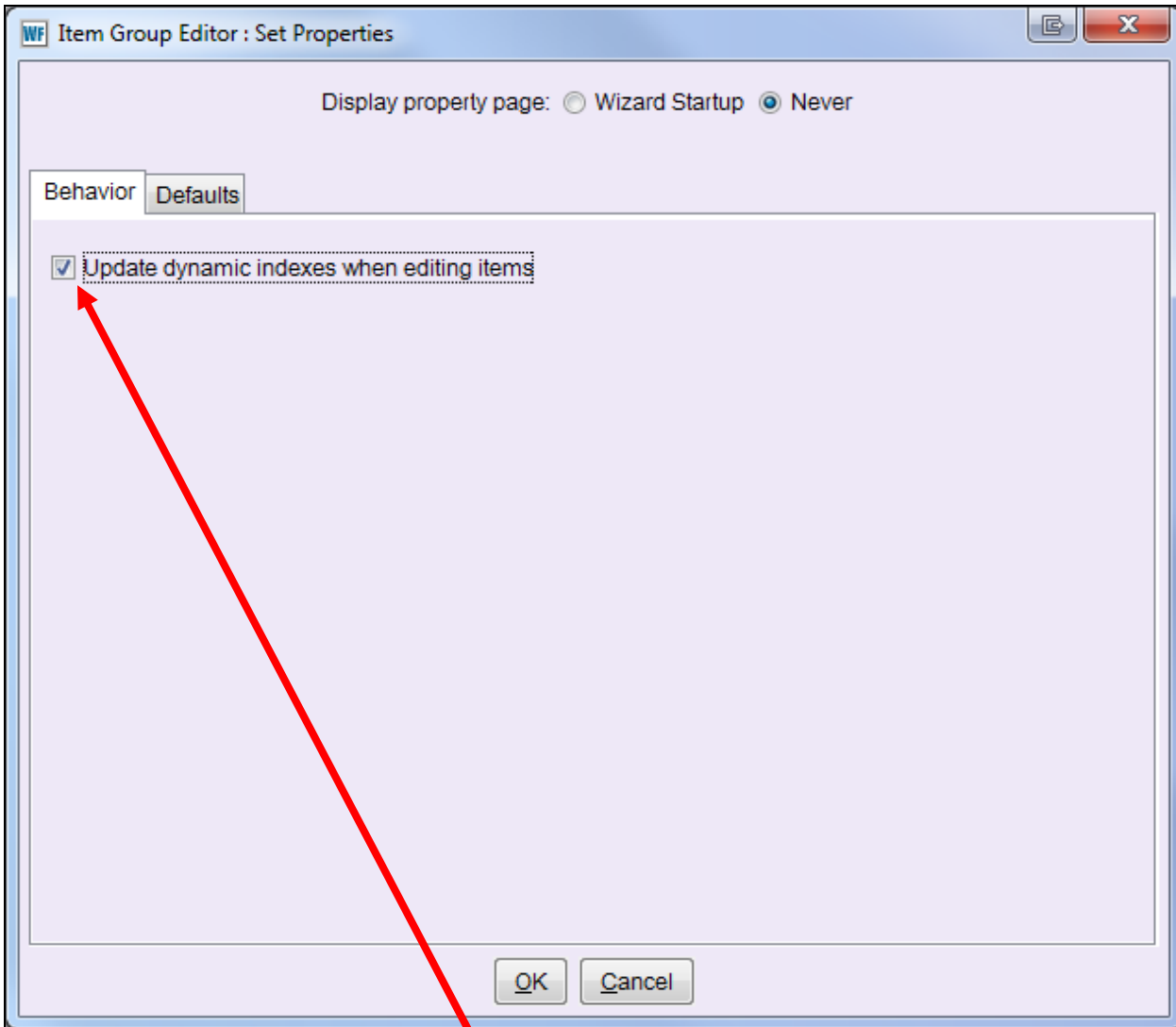
## Setting Item Group Editor Wizard Properties

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 use the item group wizard on another computer that has WorkFlows installed on it, repeat these steps on that computer.

1. Log into WorkFlows using your library's SUPER account.  
**(Important:** The SUPER account 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.



A Set Properties box appears. Click on the tab labeled “Behavior”:



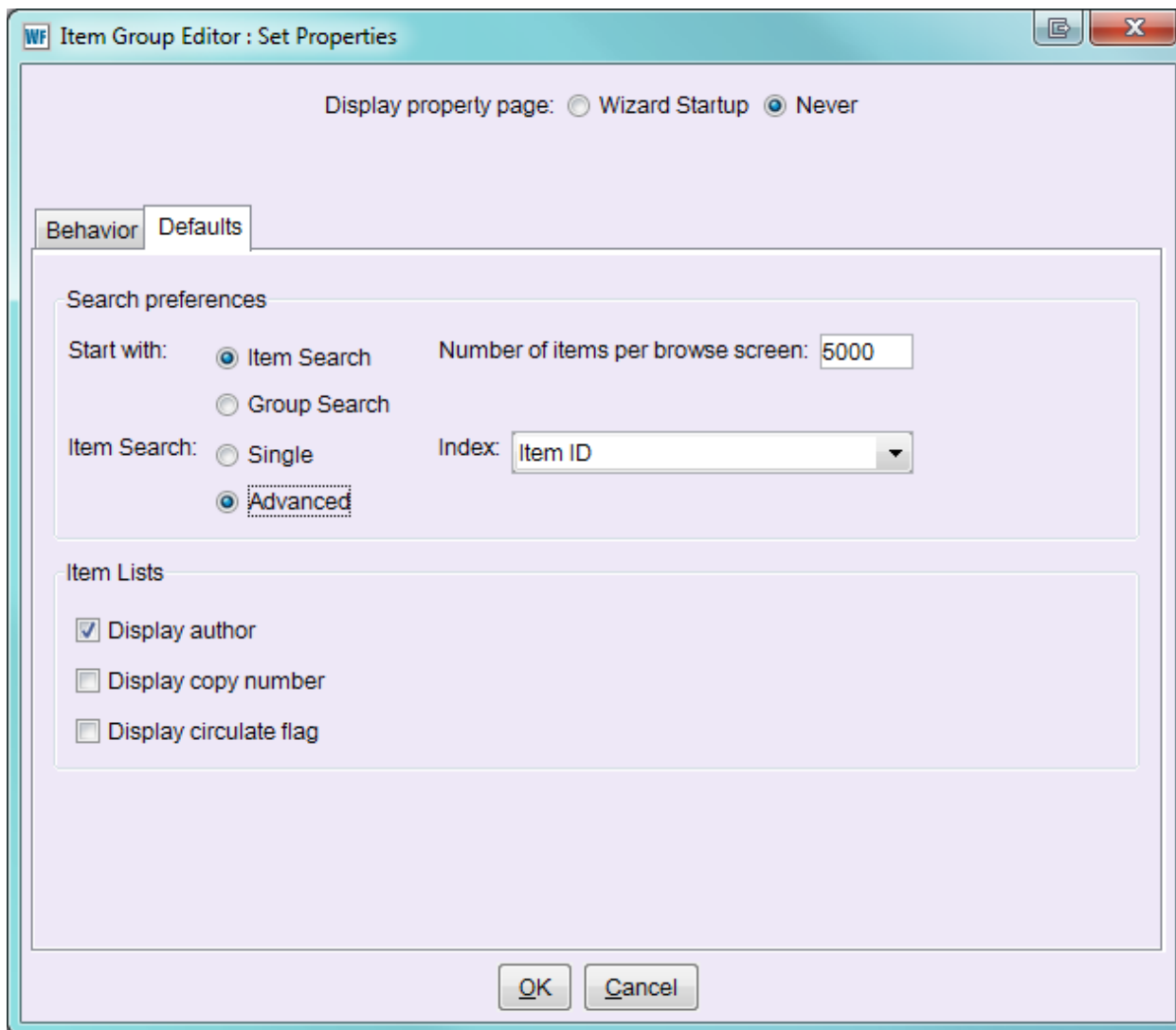
6. Check the box next to “Update dynamic indexes when editing items.”

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.

7. In the Set Properties box, click on the tab labeled “Defaults.”

8. Next to “Display property page,” make sure the radio button next to “Never” is selected.
9. For “Start with,” select the button next to “Item Search.”
10. For the number of items per browse screen, enter 5000
11. For “Item Search,” select the button next to “Advanced.”
12. 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.
13. *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.

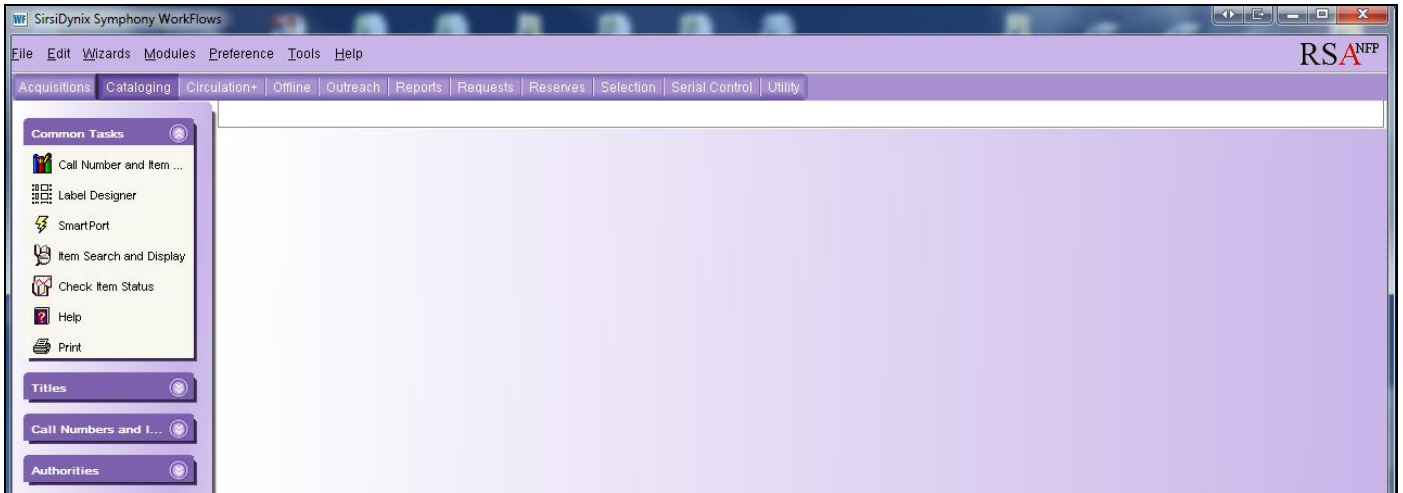
Below is a screen shot of the Defaults tab in the item group editor’s Set Properties box:



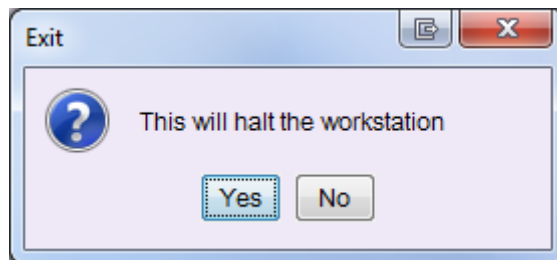
14. Click OK to close the pop-up box.



15. **Important:** To ensure WorkFlows saves the default properties for the item group editor, click the X in the upper right corner of WorkFlows.

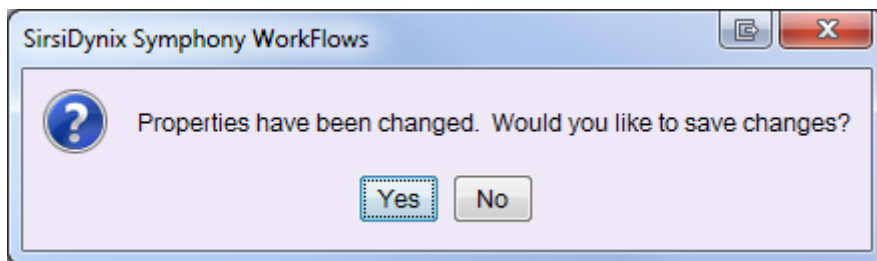


16. A pop-up will appear with the message, “This will halt the workstation.” Click Yes.



17. Another pop-up will appear with the message, “Properties have been changed. Would you like to save changes?” Click Yes.

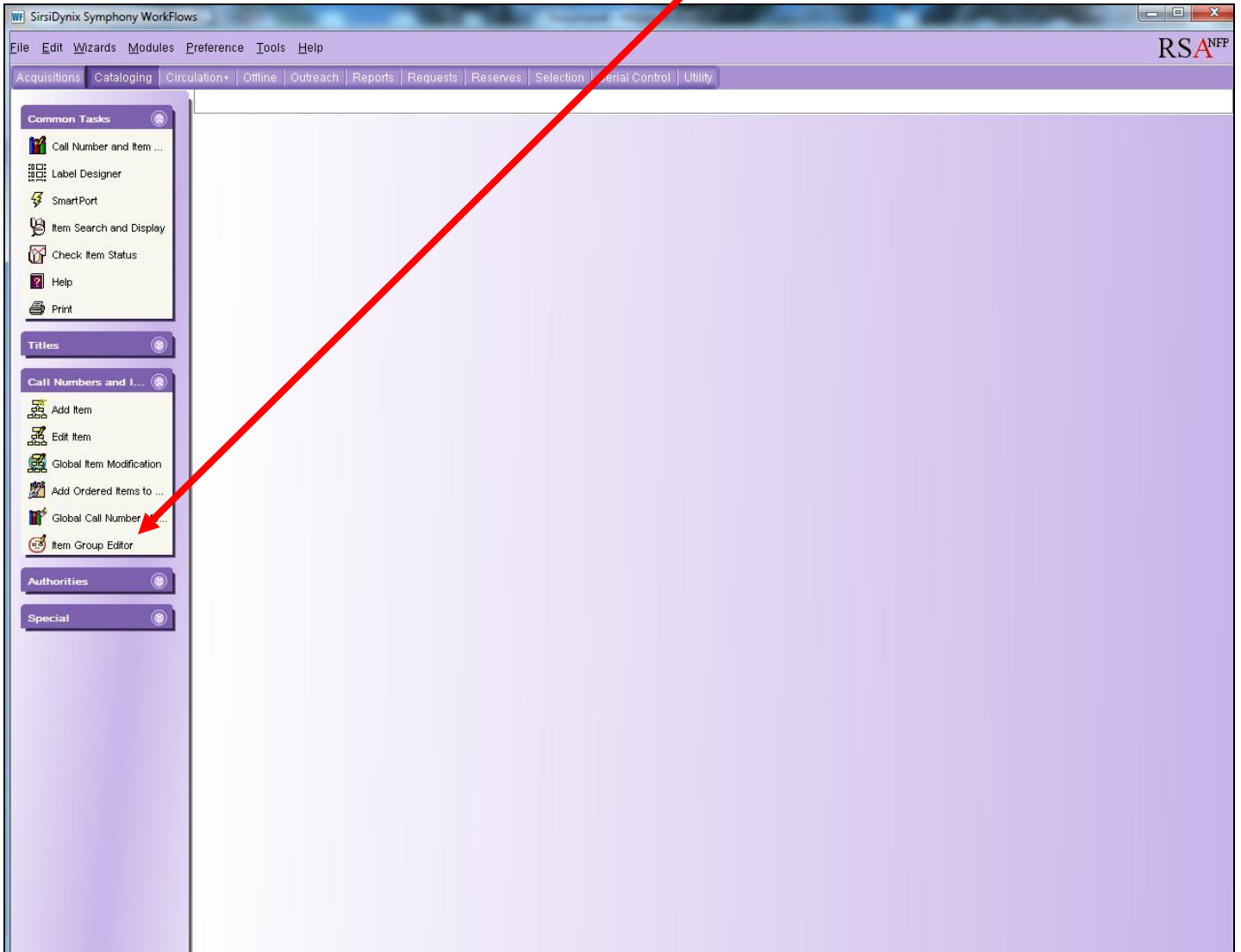
*If No is selected, none of the item group editor wizard’s settings will be saved for your next WorkFlows session.*



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

## Searching for Multiple Items

1. Log into WorkFlows using your individual cataloging account.
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.



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.

The screenshot shows the 'Item Group Editor' window with a search interface. The window title is 'Item Group Editor' and it has a menu bar with 'Preference', 'Tools', and 'Help'. Below the menu bar are tabs for 'Offline', 'Outreach', 'Reports', 'Selection', 'Serial Control', and 'Utility'. The main area is divided into search fields and a result list.

**Search Fields:** A grid of input fields for various search criteria including Library, Home location, Price, Date created, Date inventoried, Media desk, Item type, Item category 1-10, Current location, Last activity date, Extended info, Reserve status, Permanent, Shadowed, and Circulate. A 'Search' button and a 'Clear' button are located to the right of the search fields. A radio button selection is present for 'Single' and 'Advanced' search modes.

**Result List:** A table with the following columns: Title, Author, Call Number, Library, Item ID, Type, Current Location, and Circulate. This table is currently empty.

**Item List:** A second table with the same columns as the Result List: Title, Author, Call Number, Library, Item ID, Type, Current Location, and Circulate. This table is also currently empty.

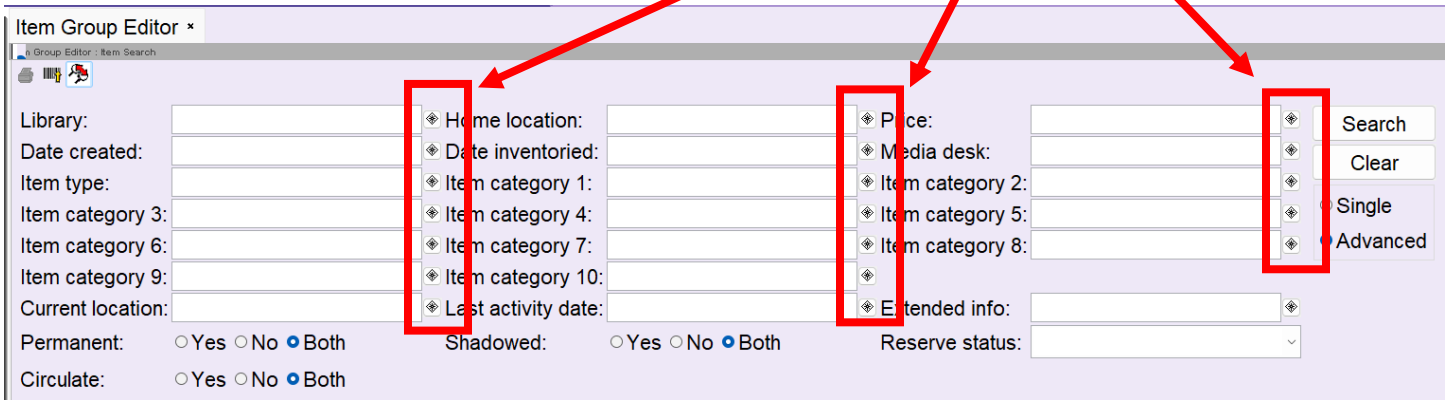
At the bottom of the window, there are buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'.

Red arrows point from text boxes on the right to the search fields, the Result List, and the Item List.

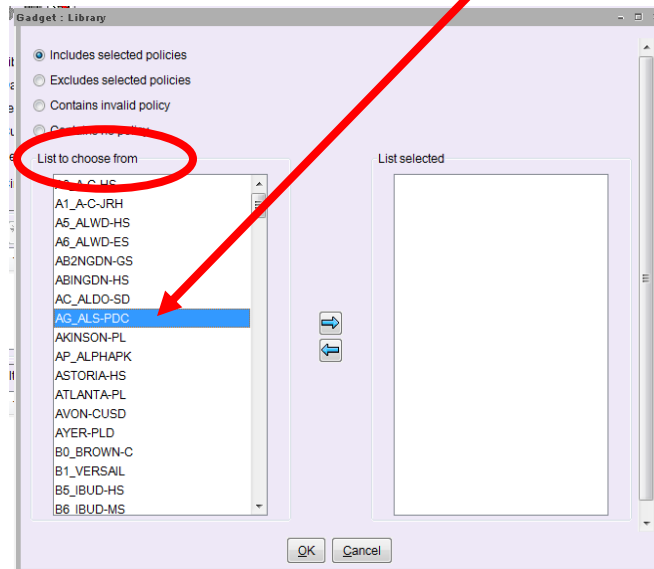
5. Select the values you want to use to search for items in your collection.



**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, reserve status, and item cat 6-10 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.

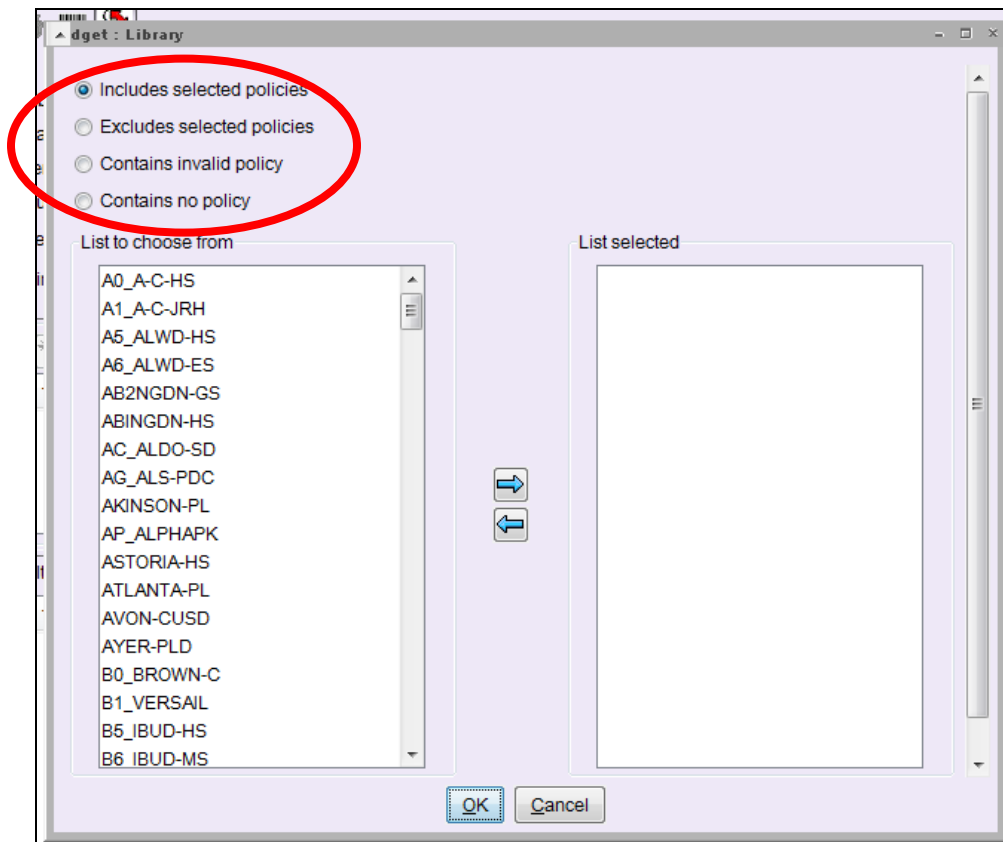
**Important Note:**

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.

6. 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 screenshot shows the 'Item Group Editor' window. At the top, there are search filters for Library (AG\_ALS-PDC), Home location (NONFICTION), Price (10.00-100.00), Date created, Date inventoried, Media desk, Item type, Item categories 1-10, Current location, Last activity date, Extended info, Permanent, Circulate, Shadowed, and Reserve status. A red circle highlights the 'Search' and 'Clear' buttons. Below the filters, a 'Result List' shows 5 records, displaying 1-5. The results are as follows:

Title	Author	Call Number	Library	Item ID	Type	Current Location	Circulate
Creating policies...	Nelson, Sandra S.	LS 025.1974 NE...	AG_ALS-PDC	A13301264015	BOOK-PBK	NONFICTION	Y
Developing refer...	Cassell, Kay Ann.	LS 025.524CAS...	AG_ALS-PDC	A13300995388	BOOK-PBK	NONFICTION	Y
Disaster respon...	Kahn, Miriam (M...	LS 025.82KAHN	AG_ALS-PDC	A13301264057	BOOK-PBK	NONFICTION	Y
Disaster respon...	Kahn, Miriam (M...	LS 025.82KAHN	AG_ALS-PDC	A13301264049	BOOK-PBK	NONFICTION	Y

Below the result list is an empty 'Item List' table. At the bottom of the window are buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'. A red arrow points from the 'Clear Item List' button to the 'Item List' table.

The results of your search are displayed in the result list.

- 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:



Result List: 2528 records, displaying 1-1000

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

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

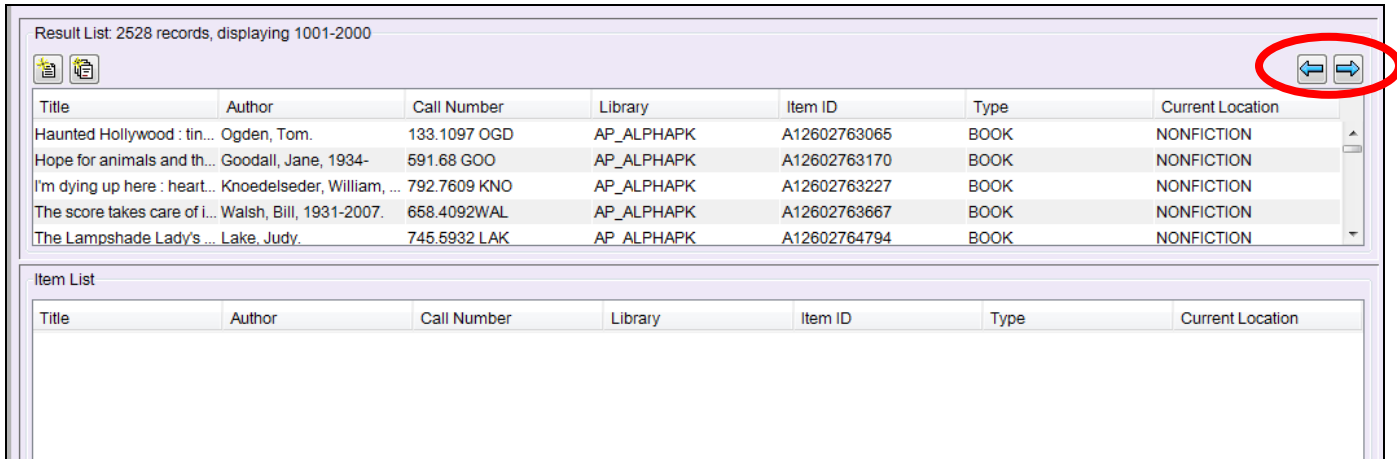
Title	Author	Call Number	Library	Item ID	Type	Current Location
-------	--------	-------------	---------	---------	------	------------------

**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 slow WorkFlows. To avoid slow performance, 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.

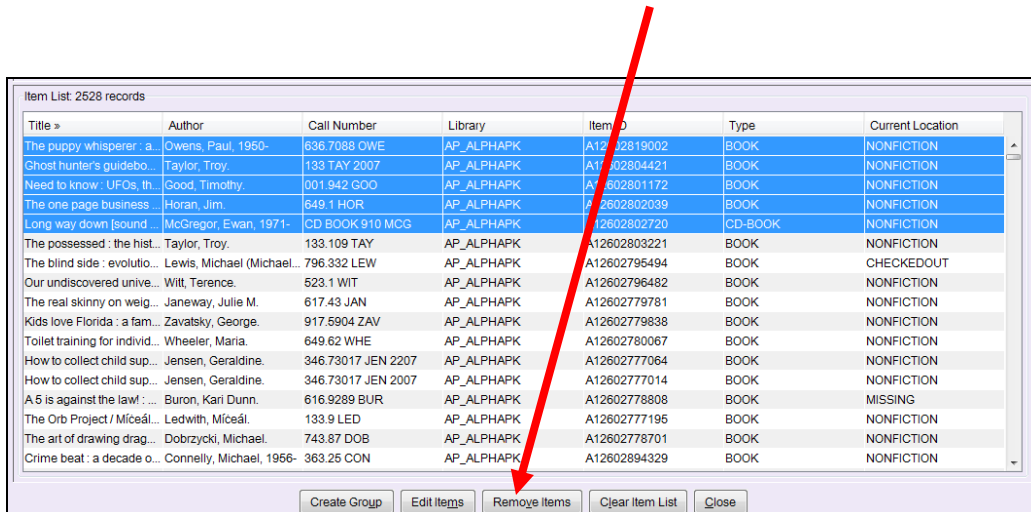
**Remember:** Only 5,000 items may be added to the item list at one time. Your library should edit no more than 5,000 items per day.

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.

Title »	Author	Call Number	Library	Item ID	Type	Current Location
The puppy whisperer : a...	Owens, Paul, 1950-	636.7088 OWE	AP_ALPHAPK	A12602819002	BOOK	NONFICTION
Ghost hunter's guidebo...	Taylor, Troy.	133 TAY 2007	AP_ALPHAPK	A12602804421	BOOK	NONFICTION
Need to know : UFOs, th...	Good, Timothy.	001.942 GOO	AP_ALPHAPK	A12602801172	BOOK	NONFICTION
The one page business ...	Horan, Jim.	649.1 HOR	AP_ALPHAPK	A12602802039	BOOK	NONFICTION
Long way down [sound ...	McGregor, Ewan, 1971-	CD BOOK 910 MCG	AP_ALPHAPK	A12602802720	CD-BOOK	NONFICTION
The possessed : the hist...	Taylor, Troy.	133.109 TAY	AP_ALPHAPK	A12602803221	BOOK	NONFICTION
The blind side : evolutio...	Lewis, Michael (Michael...	796.332 LEW	AP_ALPHAPK	A12602795494	BOOK	CHECKEDOUT
Our undiscovered unive...	Witt, Terence.	523.1 WIT	AP_ALPHAPK	A12602796482	BOOK	NONFICTION
The real skinny on weig...	Janeway, Julie M.	617.43 JAN	AP_ALPHAPK	A12602779781	BOOK	NONFICTION
Kids love Florida : a fam...	Zavatsky, George.	917.5904 ZAV	AP_ALPHAPK	A12602779838	BOOK	NONFICTION
Toilet training for individ...	Wheeler, Maria.	649.62 WHE	AP_ALPHAPK	A12602780067	BOOK	NONFICTION
How to collect child sup...	Jensen, Geraldine.	346.73017 JEN 2207	AP_ALPHAPK	A12602777064	BOOK	NONFICTION
How to collect child sup...	Jensen, Geraldine.	346.73017 JEN 2007	AP_ALPHAPK	A12602777014	BOOK	NONFICTION
A 5 is against the law! : ...	Buron, Kari Dunn.	616.9289 BUR	AP_ALPHAPK	A12602778808	BOOK	MISSING
The Orb Project / Míceál...	Ledwith, Míceál.	133.9 LED	AP_ALPHAPK	A12602777195	BOOK	NONFICTION
The art of drawing drag...	Dobrzycki, Michael.	743.87 DOB	AP_ALPHAPK	A12602778701	BOOK	NONFICTION
Crime beat : a decade o...	Connelly, Michael, 1956-	363.25 CON	AP_ALPHAPK	A12602894329	BOOK	NONFICTION

- 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.

Title »	Author	Call Number	Library	Item ID	Type	Current Location
The puppy whisperer : a...	Owens, Paul, 1950-	636.7088 OWE	AP_ALPHAPK	A12602819002	BOOK	NONFICTION
Ghost hunter's guidebo...	Taylor, Troy.	133 TAY 2007	AP_ALPHAPK	A12602804421	BOOK	NONFICTION
Need to know : UFOs, th...	Good, Timothy.	001.942 GOO	AP_ALPHAPK	A12602801172	BOOK	NONFICTION
The one page business ...	Horan, Jim.	649.1 HOR	AP_ALPHAPK	A12602802039	BOOK	NONFICTION
Long way down [sound ...	McGregor, Ewan, 1971-	CD BOOK 910 MCG	AP_ALPHAPK	A12602802720	CD-BOOK	NONFICTION
The possessed : the hist...	Taylor, Troy.	133.109 TAY	AP_ALPHAPK	A12602803221	BOOK	NONFICTION
The blind side : evolutio...	Lewis, Michael (Michael...	796.332 LEW	AP_ALPHAPK	A12602795494	BOOK	CHECKEDOUT
Our undiscovered unive...	Witt, Terence.	523.1 WIT	AP_ALPHAPK	A12602796482	BOOK	NONFICTION
The real skinny on weig...	Janeway, Julie M.	617.43 JAN	AP_ALPHAPK	A12602779781	BOOK	NONFICTION
Kids love Florida : a fam...	Zavatsky, George.	917.5904 ZAV	AP_ALPHAPK	A12602779838	BOOK	NONFICTION
Toilet training for individ...	Wheeler, Maria.	649.62 WHE	AP_ALPHAPK	A12602780067	BOOK	NONFICTION
How to collect child sup...	Jensen, Geraldine.	346.73017 JEN 2207	AP_ALPHAPK	A12602777064	BOOK	NONFICTION
How to collect child sup...	Jensen, Geraldine.	346.73017 JEN 2007	AP_ALPHAPK	A12602777014	BOOK	NONFICTION
A 5 is against the law! : ...	Buron, Kari Dunn.	616.9289 BUR	AP_ALPHAPK	A12602778808	BOOK	MISSING
The Orb Project / Míceál...	Ledwith, Míceál.	133.9 LED	AP_ALPHAPK	A12602777195	BOOK	NONFICTION
The art of drawing drag...	Dobrzycki, Michael.	743.87 DOB	AP_ALPHAPK	A12602778701	BOOK	NONFICTION
Crime beat : a decade o...	Connelly, Michael, 1956-	363.25 CON	AP_ALPHAPK	A12602894329	BOOK	NONFICTION

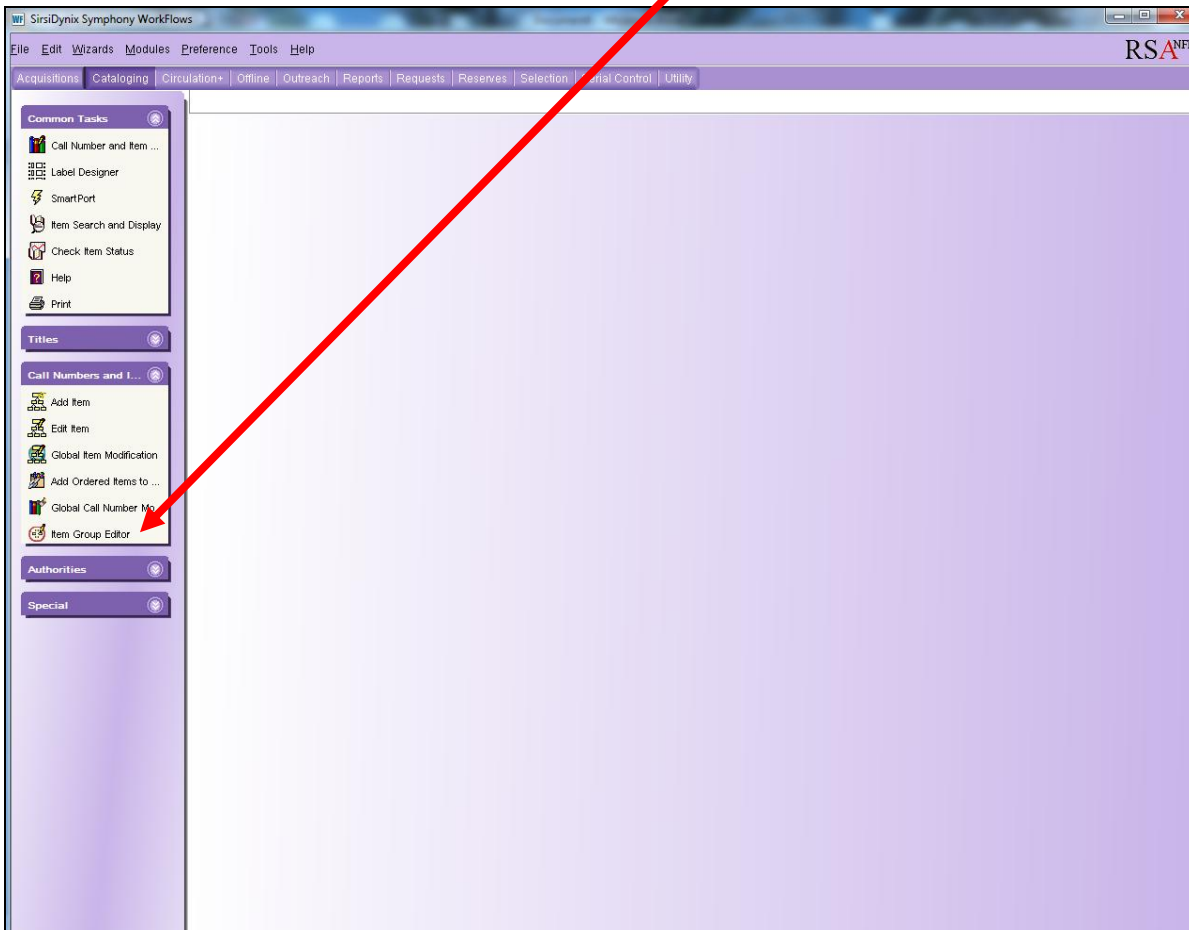
All of the items will immediately be removed from the item list. WorkFlows will not prompt you to confirm the removal.

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

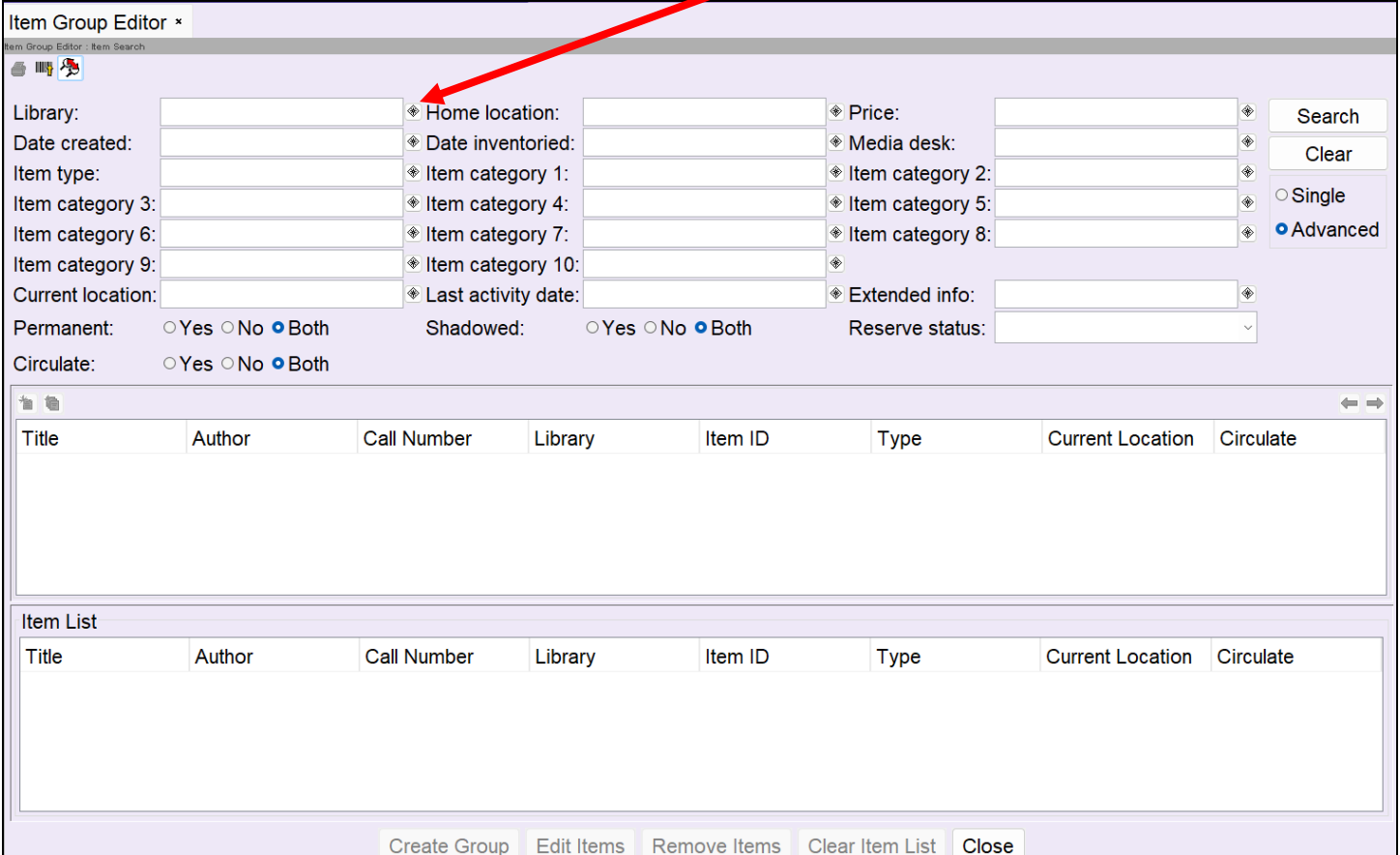
If your library's WorkFlows drop-down menus for item type, home location, or item category 4-5 codes have been customized to only include those codes your library assigns to its collection, only the codes from your customized menu(s) will appear in the gadget selection boxes in the item group editor. 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 the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.

1. Log into WorkFlows using your 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.



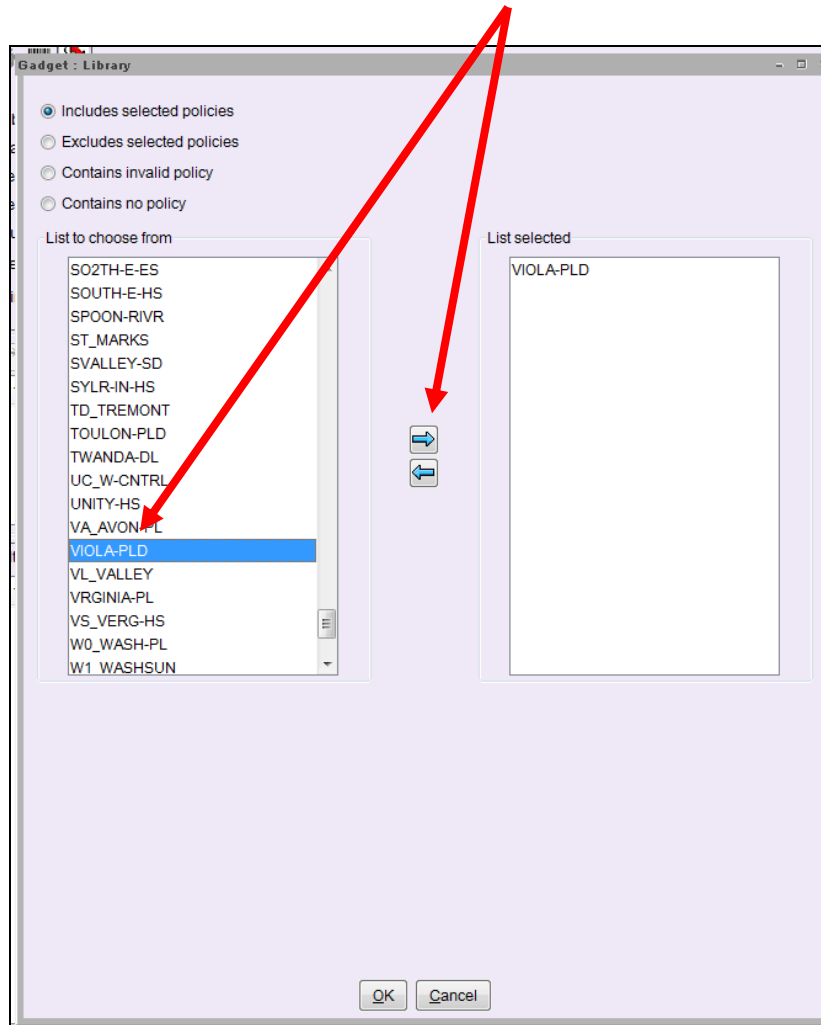
5. The advanced search screen opens. Click the gadget button next to the library field:



The screenshot shows the 'Item Group Editor' interface. At the top, there is a title bar 'Item Group Editor \*' and a subtitle 'Item Group Editor : Item Search'. Below this, there are several input fields for search criteria: Library, Date created, Item type, Item category 3, 6, 9, Current location, Home location, Date inventoried, Item category 1, 4, 7, 10, Last activity date, Price, Media desk, Item category 2, 5, 8, Extended info, Permanent, Circulate, Shadowed, and Reserve status. A red arrow points to a small gadget button (a square with a red 'X') located to the right of the 'Library' field. On the right side of the form, there are buttons for 'Search', 'Clear', and radio buttons for 'Single' and 'Advanced' (which is selected). Below the form, there are two empty tables with headers: 'Title', 'Author', 'Call Number', 'Library', 'Item ID', 'Type', 'Current Location', and 'Circulate'. At the bottom of the interface, there are buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'.

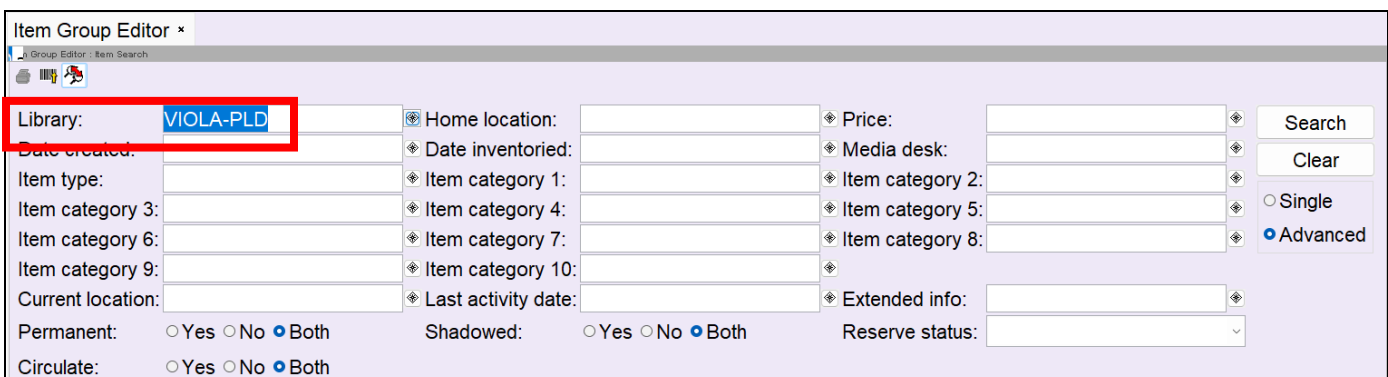
- From the gadget selection box, click on your library in the list on the left. Click the arrow to move it to the list selected on the right.

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



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

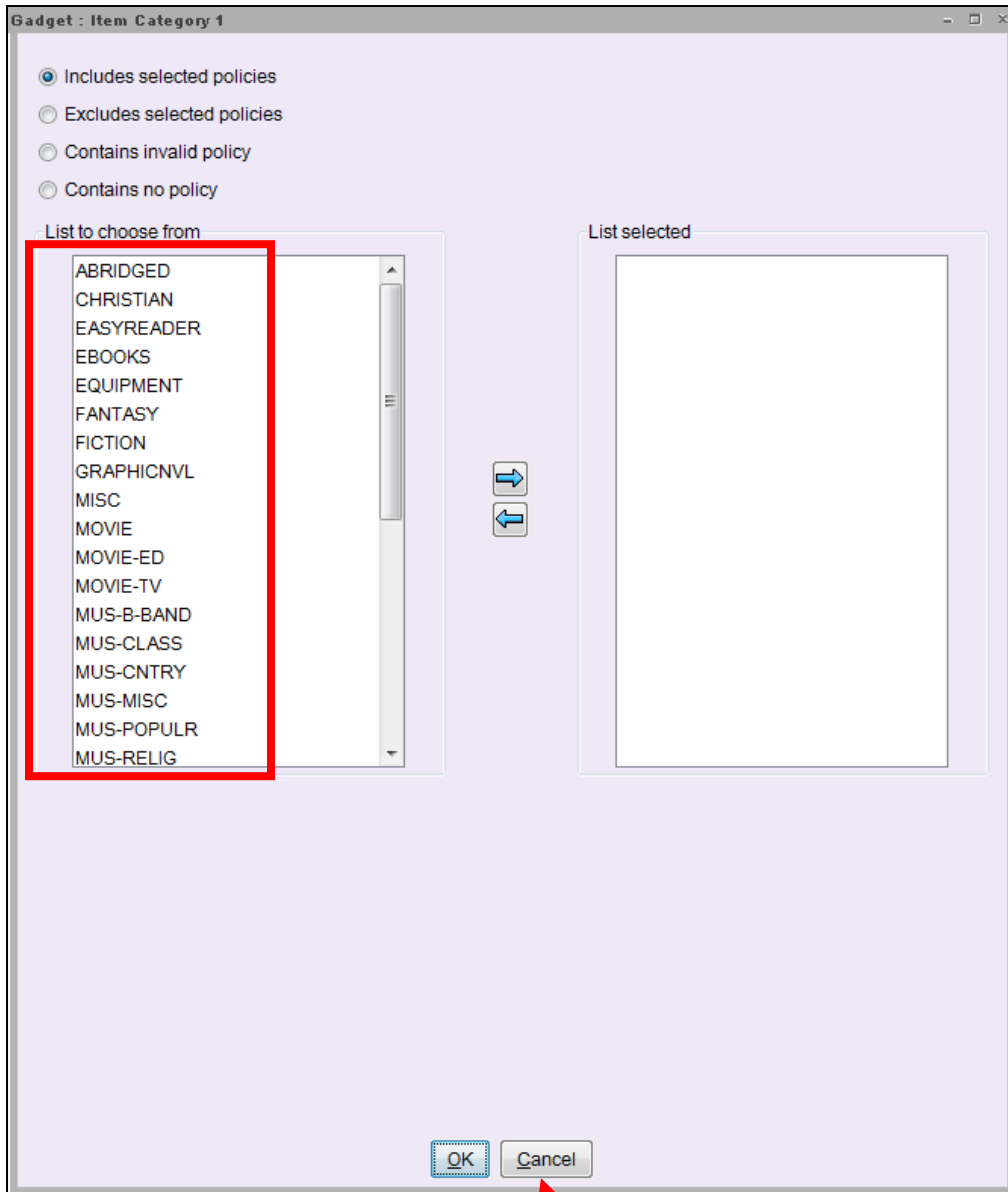
Viola Public Library appears in the example below:



Click the gadget button next to the field by which you want to search (home location, item type, or item category 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 does not appear 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.



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

- 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.

Item category 1: MYSTERY

Item Group Editor

Library: VIOLA-PLD Home location: Price: Search  
Date created: Date inventoried: Media desk: Clear  
Item type: Item category 1: MYSTERY Item category 2:  
Item category 3: Item category 4: Item category 5:  
Item category 6: Item category 7: Item category 8:  
Item category 9: Item category 10:  
Current location: Last activity date: Extended info:  
Permanent:  Yes  No  Both Shadowed:  Yes  No  Both Reserve status:  
Circulate:  Yes  No  Both

Title	Author	Call Number	Library	Item ID	Type	Current Location	Circulate
-------	--------	-------------	---------	---------	------	------------------	-----------

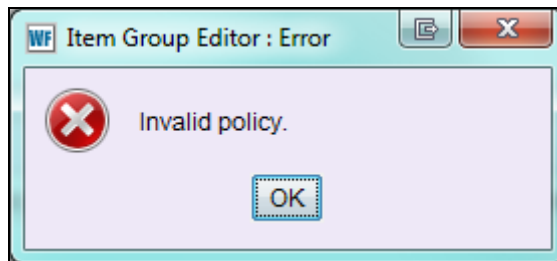
Item List

Title	Author	Call Number	Library	Item ID	Type	Current Location	Circulate
-------	--------	-------------	---------	---------	------	------------------	-----------

Create Group Edit Items Remove Items Clear Item List Close

You must type the code in uppercase.

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



10. 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:

The screenshot shows the 'Item Group Editor' window with the following search criteria:

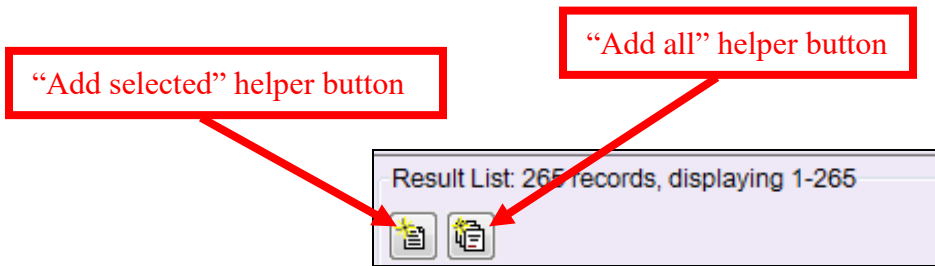
- Library: VIOLA-PLD
- Item category 1: MYSTERY

The search results table is as follows:

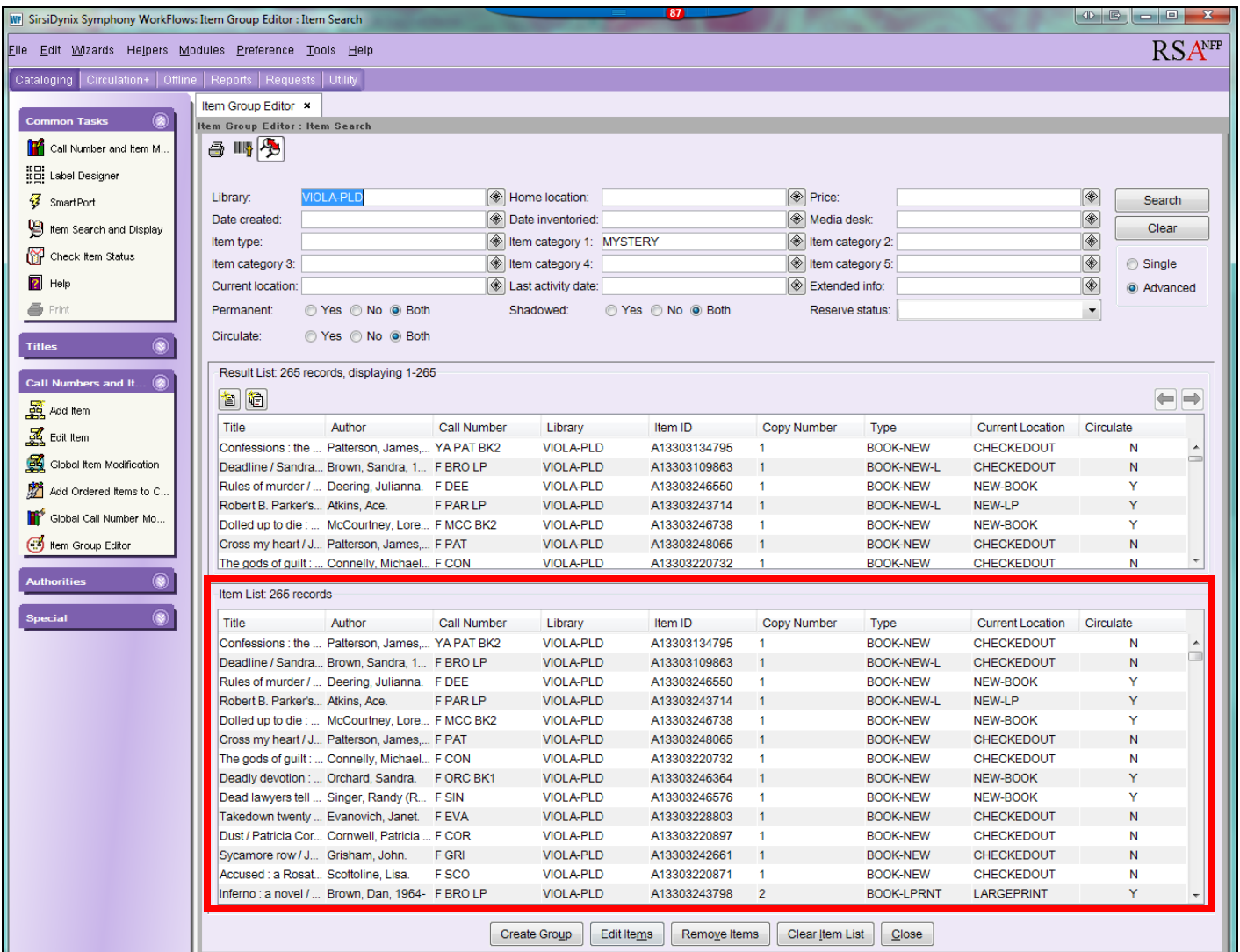
Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Confessions : the ...	Patterson, James,...	YA PAT BK2	VIOLA-PLD	A13303134795	1	BOOK-NEW	CHECKEDOUT	N
Deadline / Sandra...	Brown, Sandra, 1...	F BRO LP	VIOLA-PLD	A13303109863	1	BOOK-NEW-L	CHECKEDOUT	N
Rules of murder / ...	Deering, Julianna.	F DEE	VIOLA-PLD	A13303246550	1	BOOK-NEW	NEW-BOOK	Y
Robert B. Parker's...	Atkins, Ace.	F PAR LP	VIOLA-PLD	A13303243714	1	BOOK-NEW-L	NEW-LP	Y
Dolled up to die : ...	McCourtney, Lore...	F MCC BK2	VIOLA-PLD	A13303246738	1	BOOK-NEW	NEW-BOOK	Y
Cross my heart / J...	Patterson, James,...	F PAT	VIOLA-PLD	A13303248065	1	BOOK-NEW	CHECKEDOUT	N
The gods of guilt : ...	Connelly, Michael...	F CON	VIOLA-PLD	A13303220732	1	BOOK-NEW	CHECKEDOUT	N

11. 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.



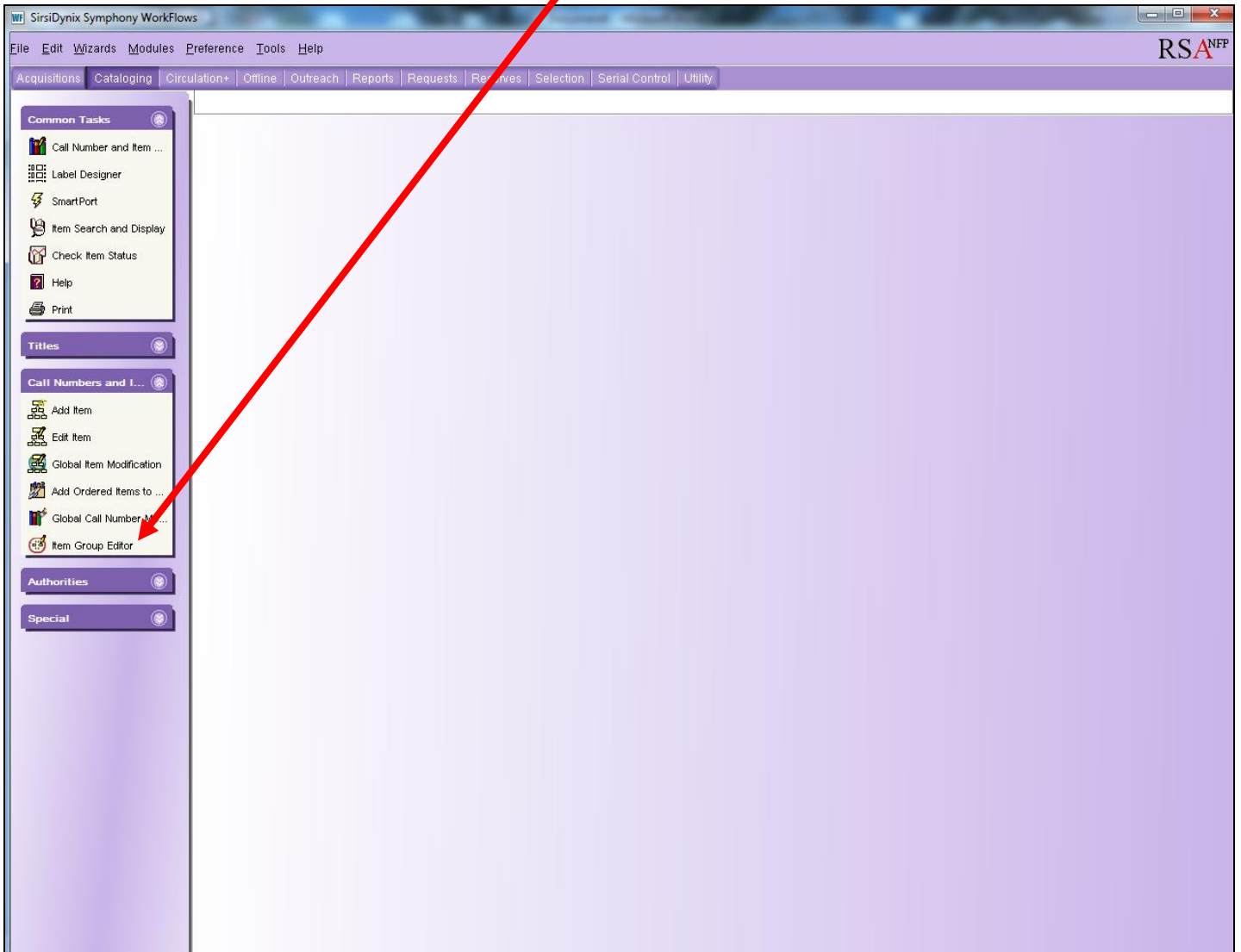
12. Create a group of items or edit them. See the following sections of this document for instructions:

- Editing an Unsaved Item List
- Saving an Item List as a Group

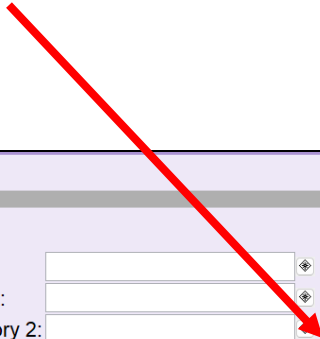


## Searching for a Single Item

1. Log into WorkFlows using your 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 advanced search screen opens. Click the radio button next to “Single.”



Item Group Editor \*

Group Editor - Item Search

Library:  Home location:  Price:  Search

Date created:  Date inventoried:  Media desk:  Clear

Item type:  Item category 1:  Item category 2:   Single

Item category 3:  Item category 4:  Item category 5:   Advanced

Item category 6:  Item category 7:  Item category 8:

Item category 9:  Item category 10:

Current location:  Last activity date:  Extended info:

Permanent:  Yes  No  Both      Shadowed:  Yes  No  Both      Reserve status:

Circulate:  Yes  No  Both

Title	Author	Call Number	Library	Item ID	Type	Current Location	Circulate
-------	--------	-------------	---------	---------	------	------------------	-----------

Item List

Title	Author	Call Number	Library	Item ID	Type	Current Location	Circulate
-------	--------	-------------	---------	---------	------	------------------	-----------

Create Group Edit Items Remove Items Clear Item List Close

## 6. 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.

Item Group Editor - Item Search

Index:

Item ID:

Single  
 Advanced

Title	Author	Call Number	Library	Item ID	Type	Current Location
Item List: 1 record						
Tom between two lovers	Weber, Carl.	F WEBER	AP_ALPHAPK	A12602904140	BOOK	NEW-FIC

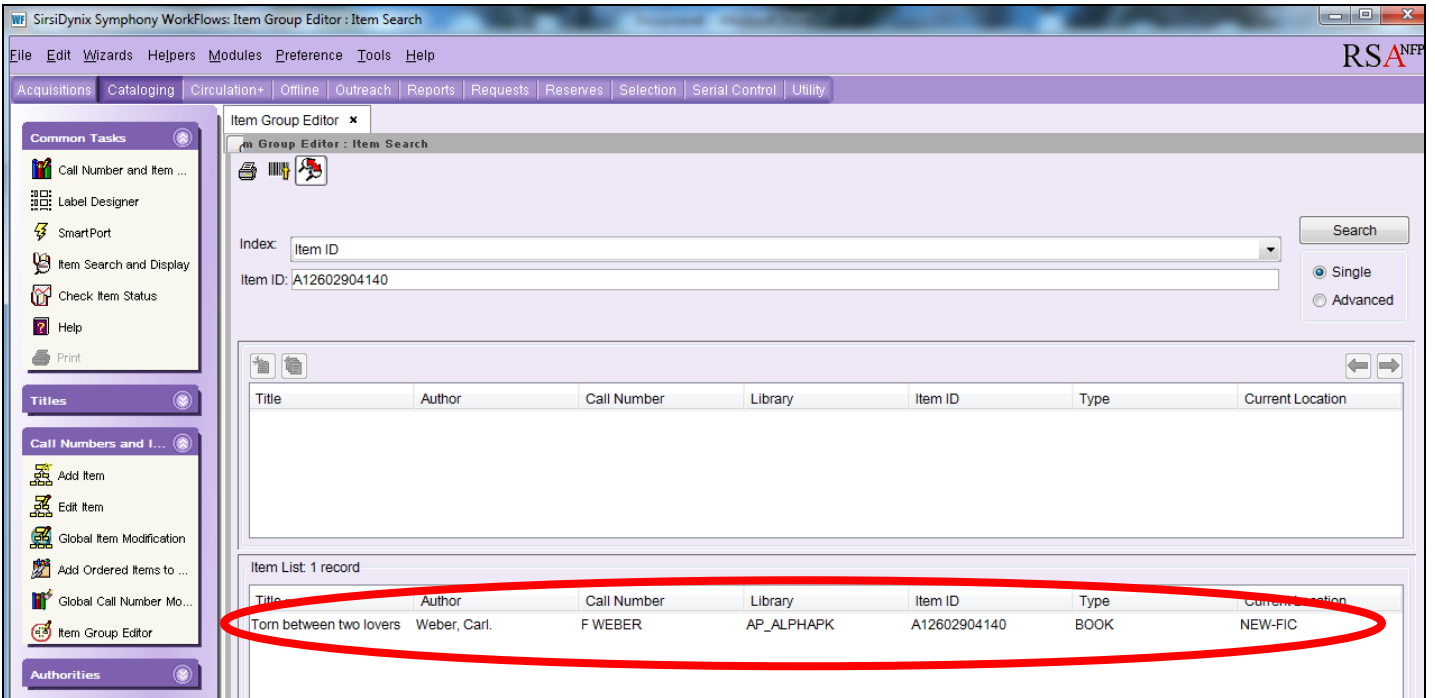
To select a search index other than item ID, click the index drop-down menu to select a different index. Once selected from the drop-down menu, many of the indexes display a gadget button to help you expand or limit your search. Other search index options, once they are selected from the index drop-down 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.

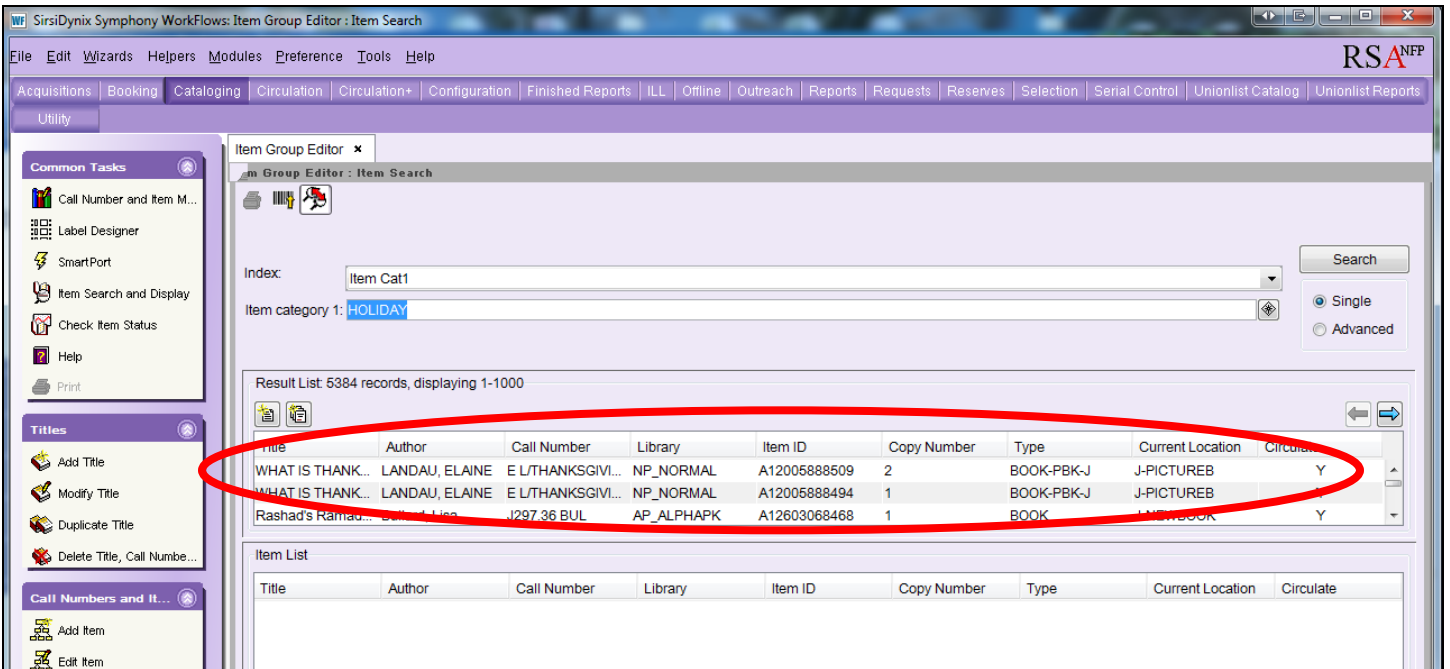
Resource Sharing Alliance

- 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).



## Printing Items in the Item List

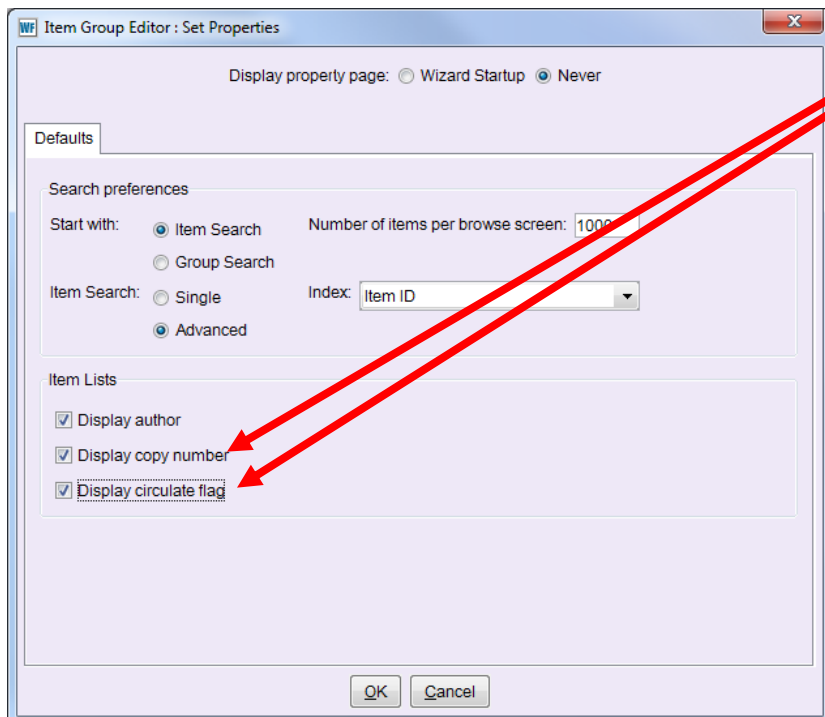
You can print a list of the items that appear in the item group editor's item list. The following fields can print for each item:

- 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 individual cataloger account 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.
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 advanced search screen opens. Search for the items you want to print.
6. Click the “Add selected” or “Add all” helper button to add the items you want to print to the item list.
7. Once the items appear in the item list, click the Print Items helper button in the upper left corner:



SirsiDynix Symphony WorkFlows: Item Group Editor: Item Search

File Edit Wizards Helpers Modules Preference Tools Help

Acquisitions Cataloging Circulation+ Online Outreach Reports Reserves Selection Serial Control Utility

Common Tasks

- Call Number and Item ...
- Label Designer
- SmartPort
- Item Search and Display
- Check Item Status
- Help
- Print

Titles

Call Numbers and I...

- Add Item
- Edit Item
- Global Item Modification
- Add Ordered Items to ...
- Global Call Number Mo...
- Item Group Editor

Authorities

Special

Item Group Editor: Item Search

Index: Item ID

Item ID:

Search

Single

Advanced

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Tough customer	Brown, Sandra, 19...	F BROWN	AP_ALPHAPK	A12602852026	2	BOOK	INTRANSIT	Y
This fire down in ...	Mason, J. D.	F MASON	AP_ALPHAPK	A12602538240	1	BOOK	NEW-FIC	Y
Therapy	Kellerman, Jonath...	F KELLERMAN	AP_ALPHAPK	A12602248950	1	BOOK	NEW-FIC	Y
The year of fog : a ...	Richmond, Michell...	F RICHMOND	AP_ALPHAPK	A12602508732	1	BOOK	NEW-FIC	Y
The trailsman : Wy...	Sharpe, Jon.	F SHARPE	AP_ALPHAPK	A12602558428	1	BOOK	NEW-FIC	Y
The pearl	Steinbeck, John, 1...	F STEINBECK	AP_ALPHAPK	A12602047320	1	BOOK	NEW-FIC	Y
The moon by night	Morris, Lynn.	F MORRIS	AP_ALPHAPK	A12602395870	1	BOOK	NEW-FIC	Y
The knitting circle	Hood, Ann, 1956-	F HOOD	AP_ALPHAPK	A12602516777	1	BOOK	NEW-FIC	Y
The kill fee	Van Wormer, Laur...	F VANWORMER	AP_ALPHAPK	A12602210839	1	BOOK	NEW-FIC	Y
The house of the s...	Hawthorne, Natha...	F HAWTHORNE	AP_ALPHAPK	A12602209590	1	BOOK	NEW-FIC	Y
The high calling	Morris, Gilbert.	F MORRIS	AP_ALPHAPK	A12602460984	1	BOOK	NEW-FIC	Y
The half-mammal...	Singleton, George...	F SINGLETON	AP_ALPHAPK	A12602260384	1	BOOK	NEW-FIC	Y
The fires of heaven	Jordan, Robert, 19...	F JOR	AP_ALPHAPK	A12601263876	1	BOOK	NEW-FIC	Y
The chisellers	O'Carroll, Brendan.	F OCARROLL	AP_ALPHAPK	A12601974033	1	BOOK	MISSING	N
The Botox diaries	Kaplan, Janice.	F KAPLAN LGPRI...	AP_ALPHAPK	A12602300809	1	BOOK	NEW-FIC	Y
The assassins gall...	Robbins, David L...	F ROBBINS	AP_ALPHAPK	A12602464086	1	BOOK	NEW-FIC	Y
Sweet magnolia : ...	Jarrett, Norma L.	F JARRETT	AP_ALPHAPK	A12602462384	1	BOOK	NEW-FIC	Y

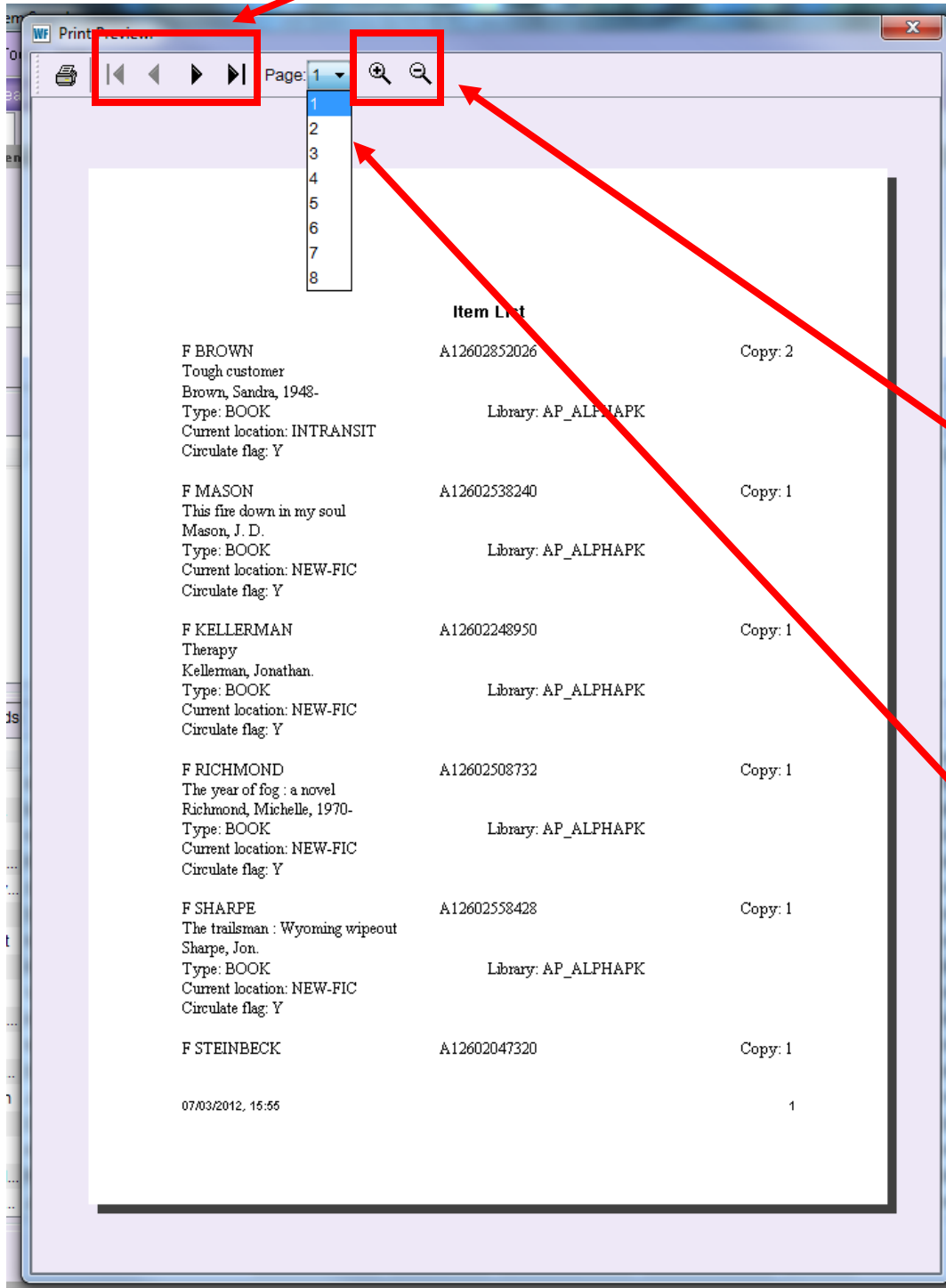
Item List: 44 records

Create Group Edit Items Remove Items Clear Item List Close

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:

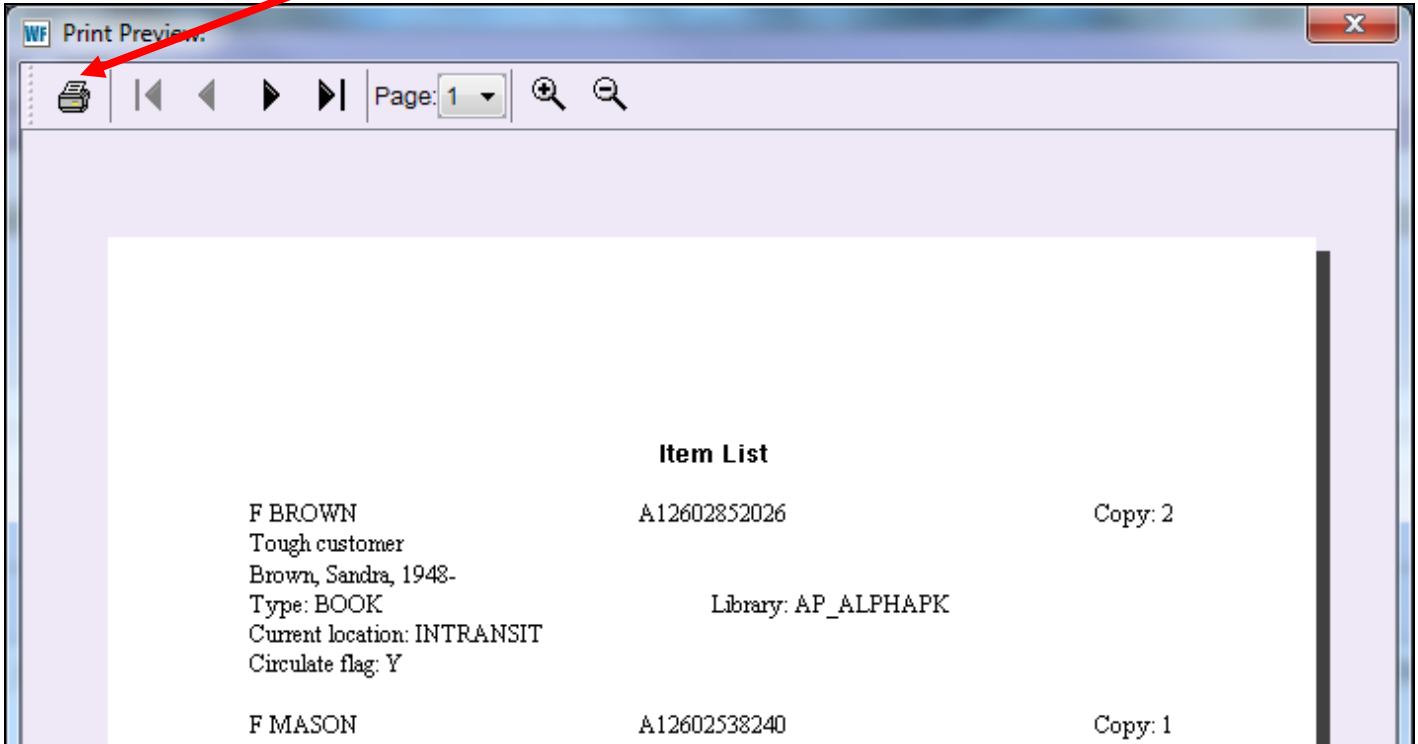
The arrow buttons at the top of the Print Preview window help you navigate through the document page by page. The arrows followed by the vertical line allow you to navigate quickly to the first or last page of the document.



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.

When you are ready to print the list of items, click the Printer button at the top of the Print Preview window:



8. A Print box should open. Select the appropriate printer and any properties, such as double-sided, stapled, etc.

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

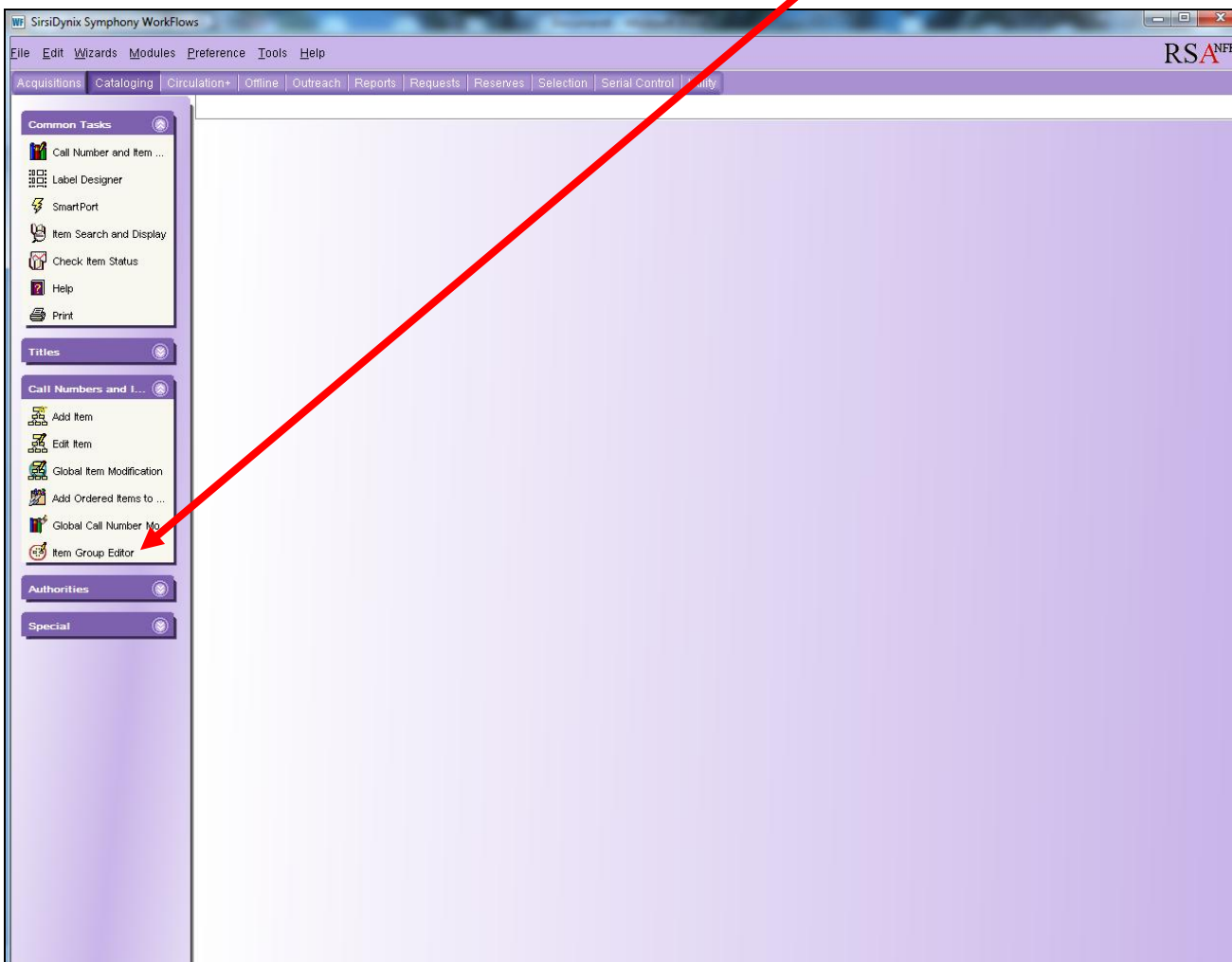


## Editing an Unsaved Item List

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.
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.



- 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.
- 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.

- 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 screenshot shows the 'Item Group Editor: Item Search' window. The interface includes a menu bar (File, Edit, Wizards, Helpers, Modules, Preference, Tools, Help), a toolbar with various icons, and a search form. The search form contains fields for Library (OPELL-PL), Home location (FICTION), Date created (<07/01/2012), Date inventoried, Item type (BOOK-NEWNEW-BOOK), Item category 1, Current location, Last activity date, and Extended info. There are also radio buttons for Permanent, Shadowed, and Reserve status, and a dropdown for Reserve status. A 'Search' button and a 'Clear' button are present. Below the search form is a 'Result List' showing 85 records, displaying 1-85. The result list is a table with columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. Below the result list is an 'Item List' showing 85 records, also displaying 1-85. The item list is a table with the same columns as the result list. At the bottom of the window, there are buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'. A red arrow points to the 'Edit Items' button.

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Happy ever after / ...	Roberts, Nora.	FIC ROB 2010	OPELL-PL	A87104302863	1	BOOK-NEW	FICTION	Y
The pumpkin muff...	Washburn, L. J.	FIC WAS 2010 PB	OPELL-PL	A87104302821	1	BOOK-NEW	CHECKEDOUT	N
Berried to the hit /...	MacInerney, Kare...	FIC MAC 2010 PB	OPELL-PL	A87104303055	1	BOOK-NEW	CHECKEDOUT	N
An Amish Christm...	Keller, Cynthia.	FIC KEL 2010	OPELL-PL	A87104301914	1	BOOK-NEW	FICTION	Y
Snow day : a nov...	Coffey, Billy.	FIC COF 2010	OPELL-PL	A87104301728	1	BOOK-NEW	FICTION	Y

The Edit Items box will open:

Group Editor : Edit Items

Item information

Item ID: Copy number: Will not be modified

Type: Will not be modified Item library: Will not be modified

Home location: Will not be modified Current location:

Item cat1: Will not be modified Item cat2: Will not be modified

Media desk: Will not be modified Number of pieces: Will not be modified

Permanent: Will not be modified Price: Will not be modified

Shadow item: Will not be modified Circulate: Will not be modified

Extended information

New  Append  Replace CIRCNOTE:

New  Append  Replace PUBLIC:

New  Append  Replace STAFF:

Title	Call Number	Library	Item ID	Status

Edit Items Reset (b) Close

- 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.

**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 below 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. Please do not edit the copy number. Editing the copy number can cause trouble in the automatic counter on the WorkFlows backend, including if RSA needs to run a history log of the item at some point.
Type	The code assigned to the item that indicates its format (BOOK, N-BK, 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.). <b><i>This value cannot be modified in the item group editor.</i></b>
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. RSA runs a daily script to ensure items are assigned the correct item cat 3 based on their item type.
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.
Item cats 6-10	The value for item categories 6-10 will remain “Will not be modified.” No need to edit these item cats because RSA is not currently using them. If item cats 6-10 do not appear on the item group editor screen, you are not running the latest version of WorkFlows. Download it <a href="#">here</a> from the RSA support site.
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

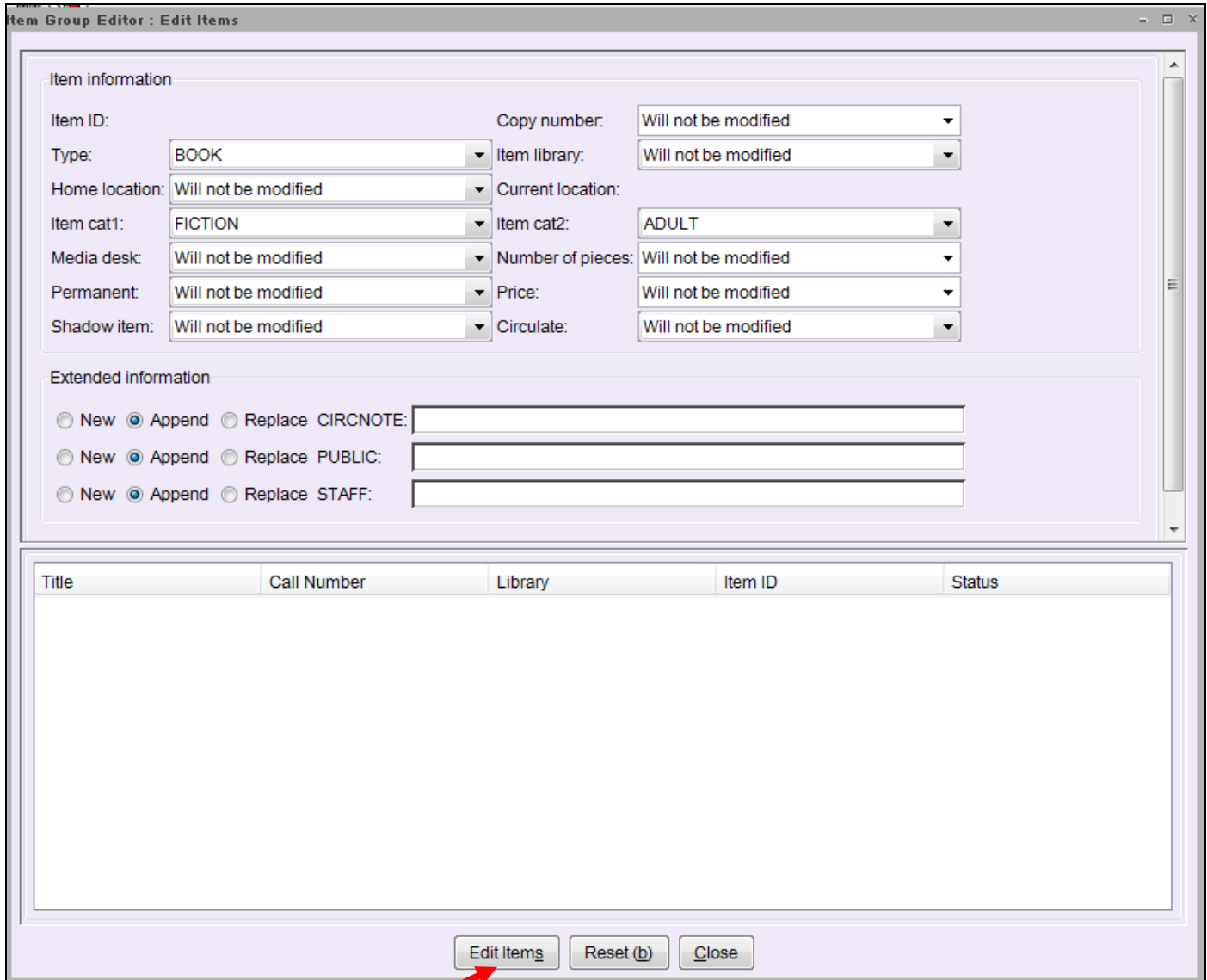
	included in the item. To enter a value for number of pieces in the edit items box, select the blank option from the drop-down menu. Type the value for the number of pieces that should be assigned to all of the items in the item list. Editing the number of pieces to a value greater than one may interfere with self-checkout machines.
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	The value for Circulate should remain “Will not be modified.” The circulate box must be checked for all items. A no circulation rule associated with an item type should be used to block the checkout of an item, rather than unchecking the circulate box.
Extended information	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.

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
- 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:

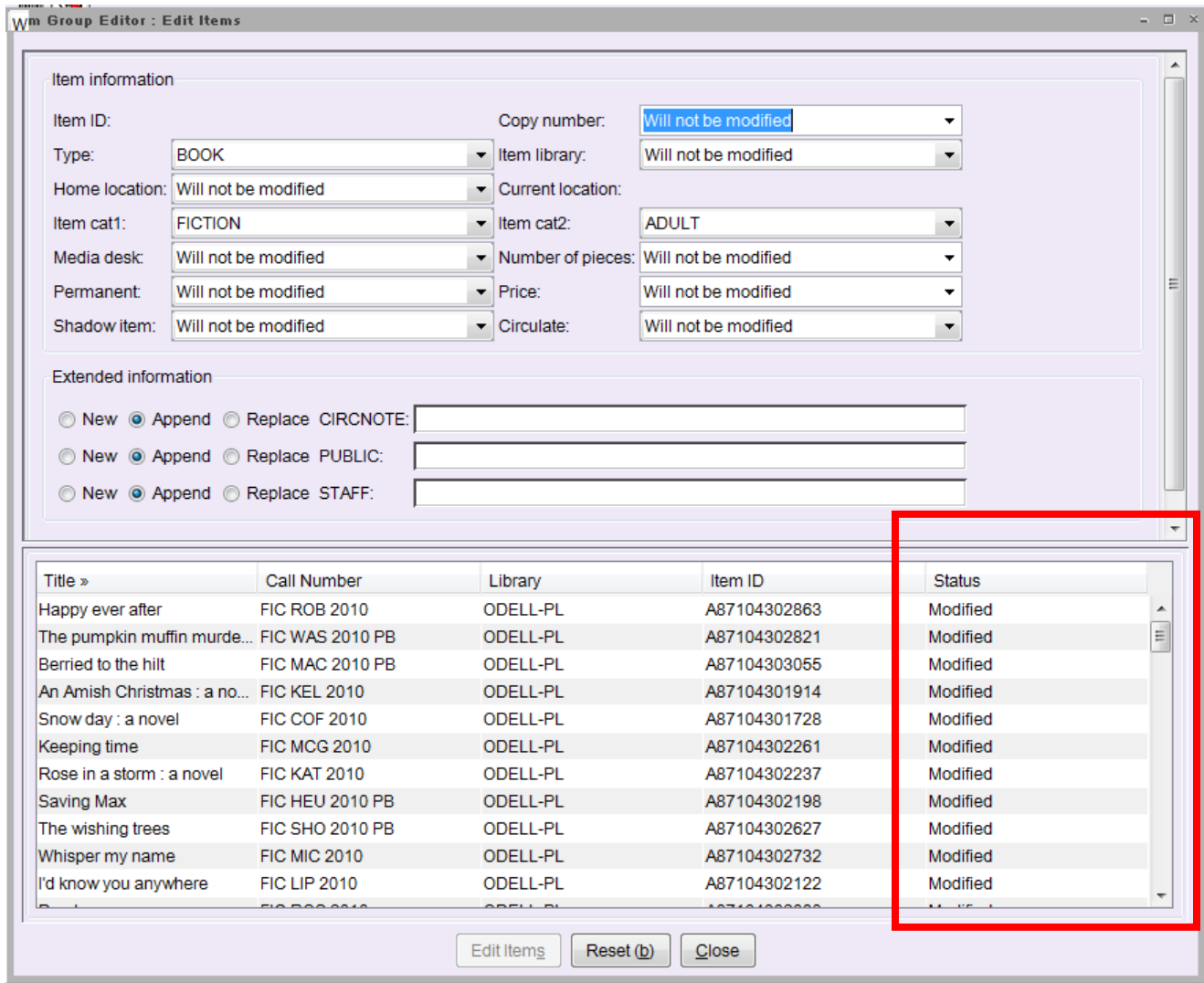
- The item type will be modified to BOOK.
- The item category 1 code will be modified to FICTION.
- The item category 2 code will be modified to ADULT.



9. 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:



10. 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.

## Resource Sharing Alliance

Item information

Item ID: Copy number: Will not be modified

Type: BOOK Item library: Will not be modified

Home location: Will not be modified Current location:

Item cat1: FICTION Item cat2: ADULT

Media desk: Will not be modified Number of pieces: Will not be modified

Permanent: Will not be modified Price: Will not be modified

Shadow item: Will not be modified Circulate: Will not be modified


Extended information

New  Append  Replace CIRCNOTE:

New  Append  Replace PUBLIC:

New  Append  Replace STAFF:

Title »	Call Number	Library	Item ID	Status
Happy ever after	FIC ROB 2010	ODELL-PL	A87104302863	Modified
The pumpkin muffin murde...	FIC WAS 2010 PB	ODELL-PL	A87104302821	Modified
Berried to the hilt	FIC MAC 2010 PB	ODELL-PL	A87104303055	Modified
An Amish Christmas : a no...	FIC KEL 2010	ODELL-PL	A87104301914	Modified
Snow day : a novel	FIC COF 2010	ODELL-PL	A87104301728	Modified
Keeping time	FIC MCG 2010	ODELL-PL	A87104302261	Modified
Rose in a storm : a novel	FIC KAT 2010	ODELL-PL	A87104302237	Modified
Saving Max	FIC HEU 2010 PB	ODELL-PL	A87104302198	Modified
The wishing trees	FIC SHO 2010 PB	ODELL-PL	A87104302627	Modified
Whisper my name	FIC MIC 2010	ODELL-PL	A87104302732	Modified
I'd know you anywhere	FIC LIP 2010	ODELL-PL	A87104302122	Modified



11. 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 BLUEcloud Analytics (BCA). Please note that modifications to items are not immediately visible in BCA. The modifications will only be visible in BCA 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.

The screenshot shows the 'Edit Items' window with the following details:

**Item information:**

- Item ID: (empty)
- Copy number: Will not be modified
- Type: Will not be modified
- Item library: Will not be modified
- Home location: FICTION
- Current location: (empty)
- Item cat1: Will not be modified
- Item cat2: Will not be modified
- Media desk: Will not be modified
- Number of pieces: Will not be modified
- Permanent: Will not be modified
- Price: Will not be modified
- Shadow item: Will not be modified
- Circulate: Will not be modified

**Extended information:**

- New  Append  Replace CIRCNOTE: (empty)
- New  Append  Replace PUBLIC: (empty)
- New  Append  Replace STAFF: (empty)

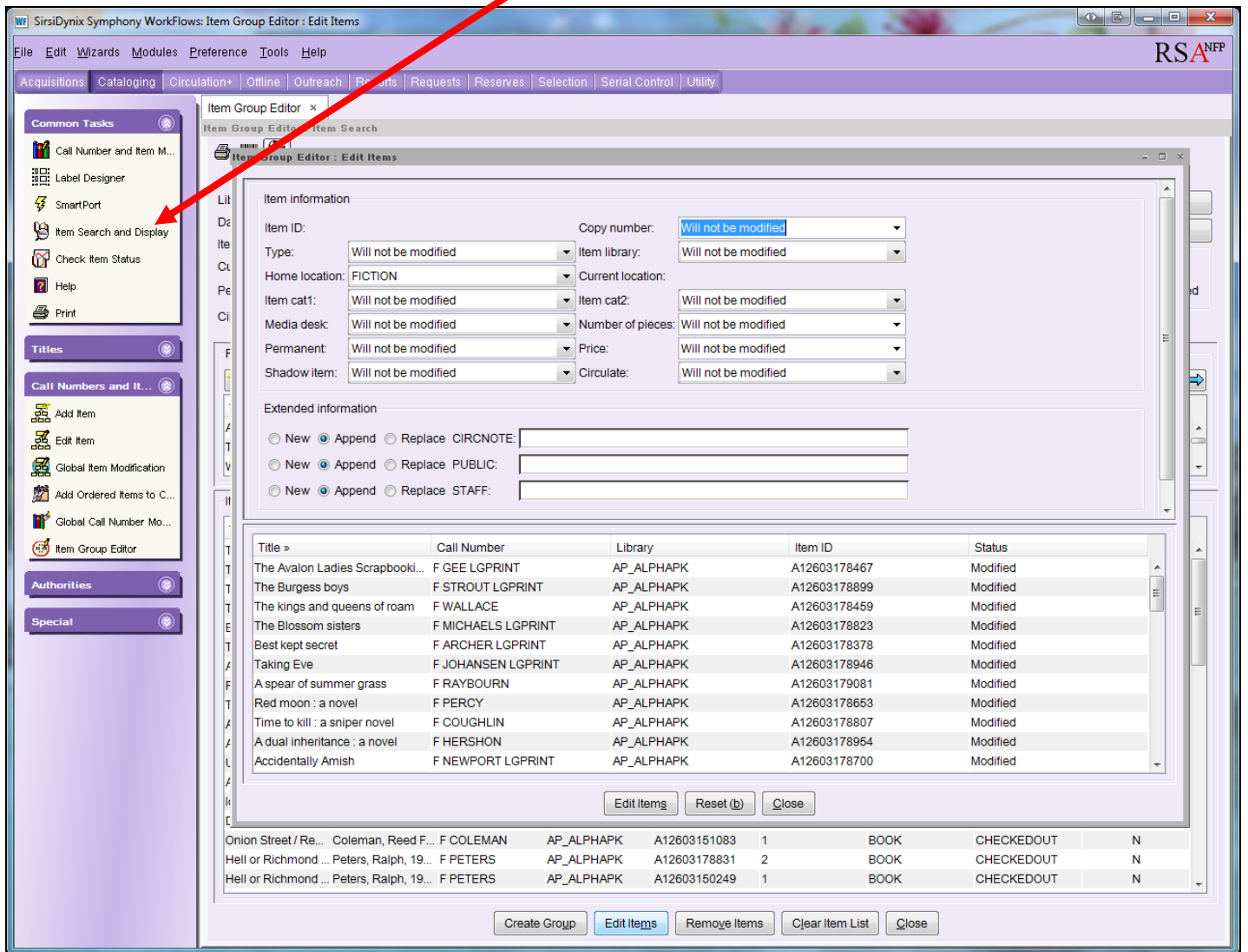
**Table of Items:**

Title »	Call Number	Library	Item ID	Status
The loop	F LAWSON YA	AP_ALPHAPK	A12603179324	Modified
Sketchy	F SAMMS YA	AP_ALPHAPK	A12603147131	Modified
15 days without a head	F COUSINS YA	AP_ALPHAPK	A12603174196	Modified
Evils	F SILBER	AP_ALPHAPK	A12603178441	Modified
<b>Under Tower Peak</b>	F PAUL	AP_ALPHAPK	<b>A12603179594</b>	Modified
Vacationland	F STONICH	AP_ALPHAPK	A12603174184	Modified
Elizabeth the first wife	F DOLAN	AP_ALPHAPK	A12603179510	Modified
Every broken trust	F RODRIGUEZ	AP_ALPHAPK	A12603178912	Modified
This is life	F RHODES	AP_ALPHAPK	A12603178815	Modified
Sign of the cross : a Spike Sang...	F MOGFORD	AP_ALPHAPK	A12603146703	Modified
Angel baby : a novel	F LANGE	AP_ALPHAPK	A12603146583	Modified

Buttons at the bottom: Edit Items, Reset (b), Close

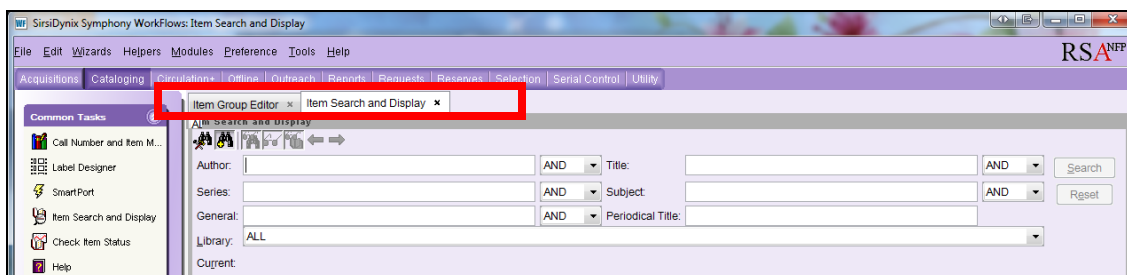
Leave the Edit Items box open in the item group editor in case you want to spot check more items.

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



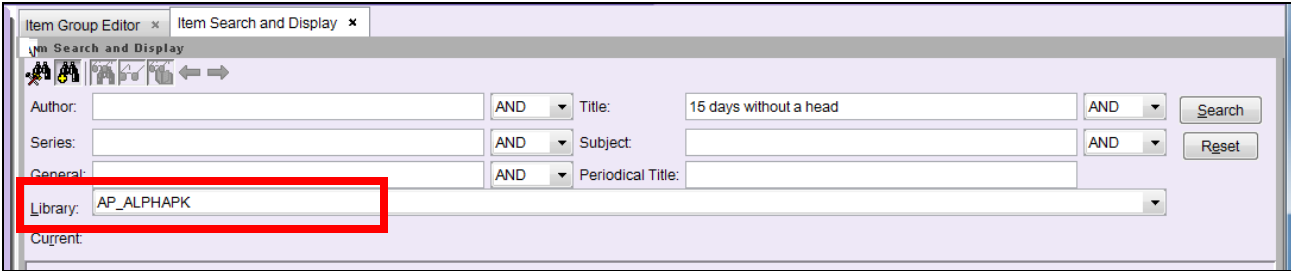
3. Once you click on the Item Search and Display wizard, two tabs—one for the item group editor and another for Item Search and Display—should appear at the top or the bottom of your screen. The location of the tabs on your screen depends on your setting for tabbed window display.

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:

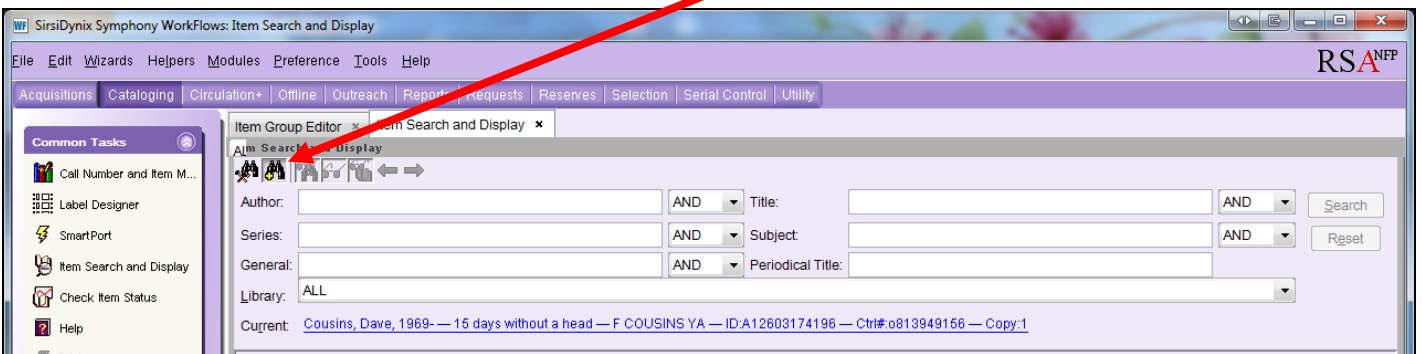


4. Search by title or item ID in the Item Search and Display wizard.

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.



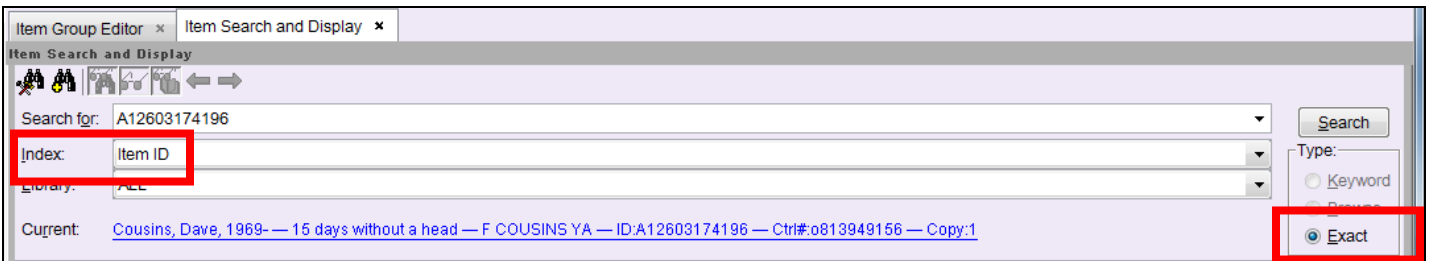
If you search by item ID, click the Advanced Search helper button in the upper left corner of the Item Search and Display wizard:



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.

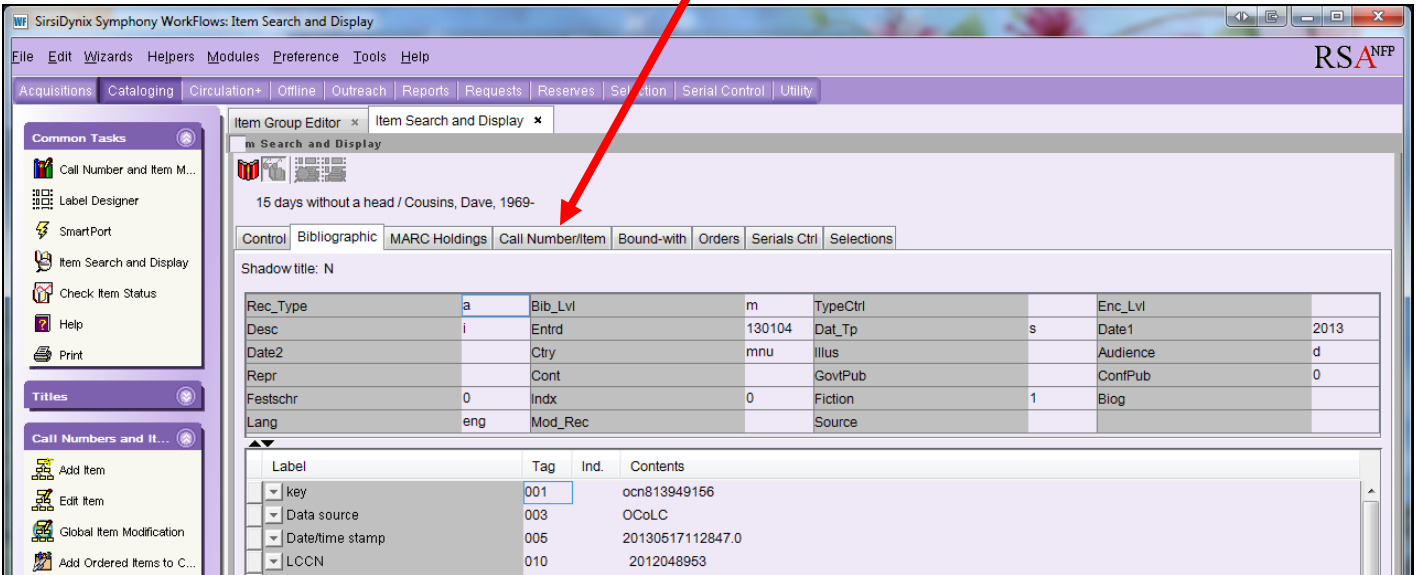
Type in the item ID for which you want to search.



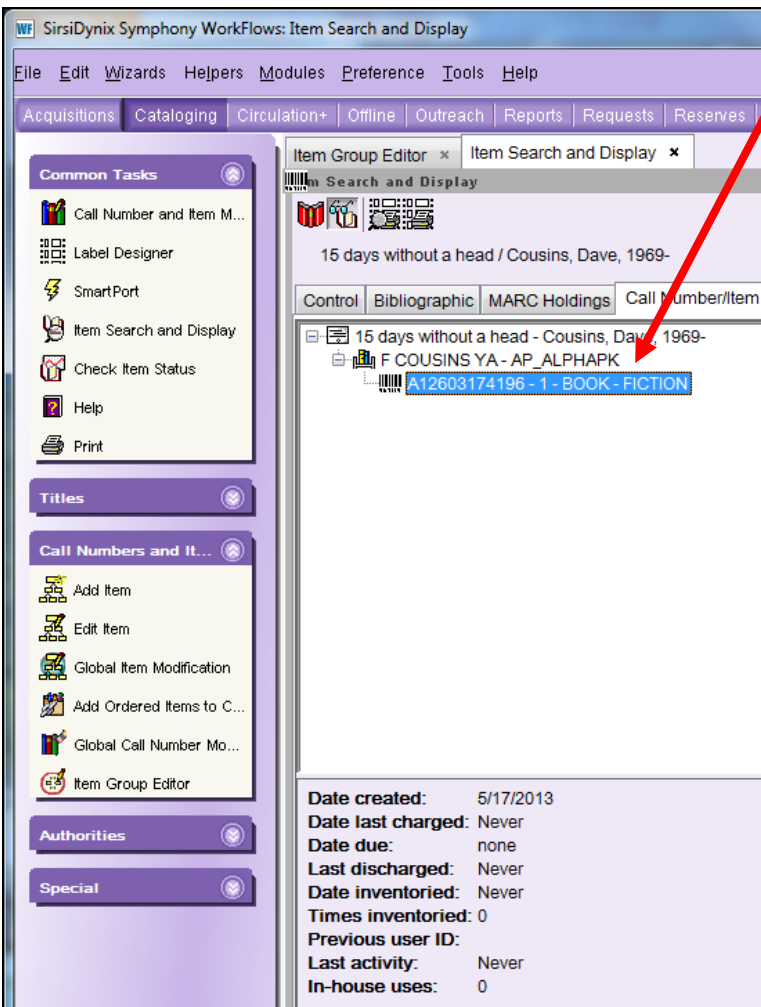
Hit <Enter> on your keyboard or click the Search button.

Resource Sharing Alliance

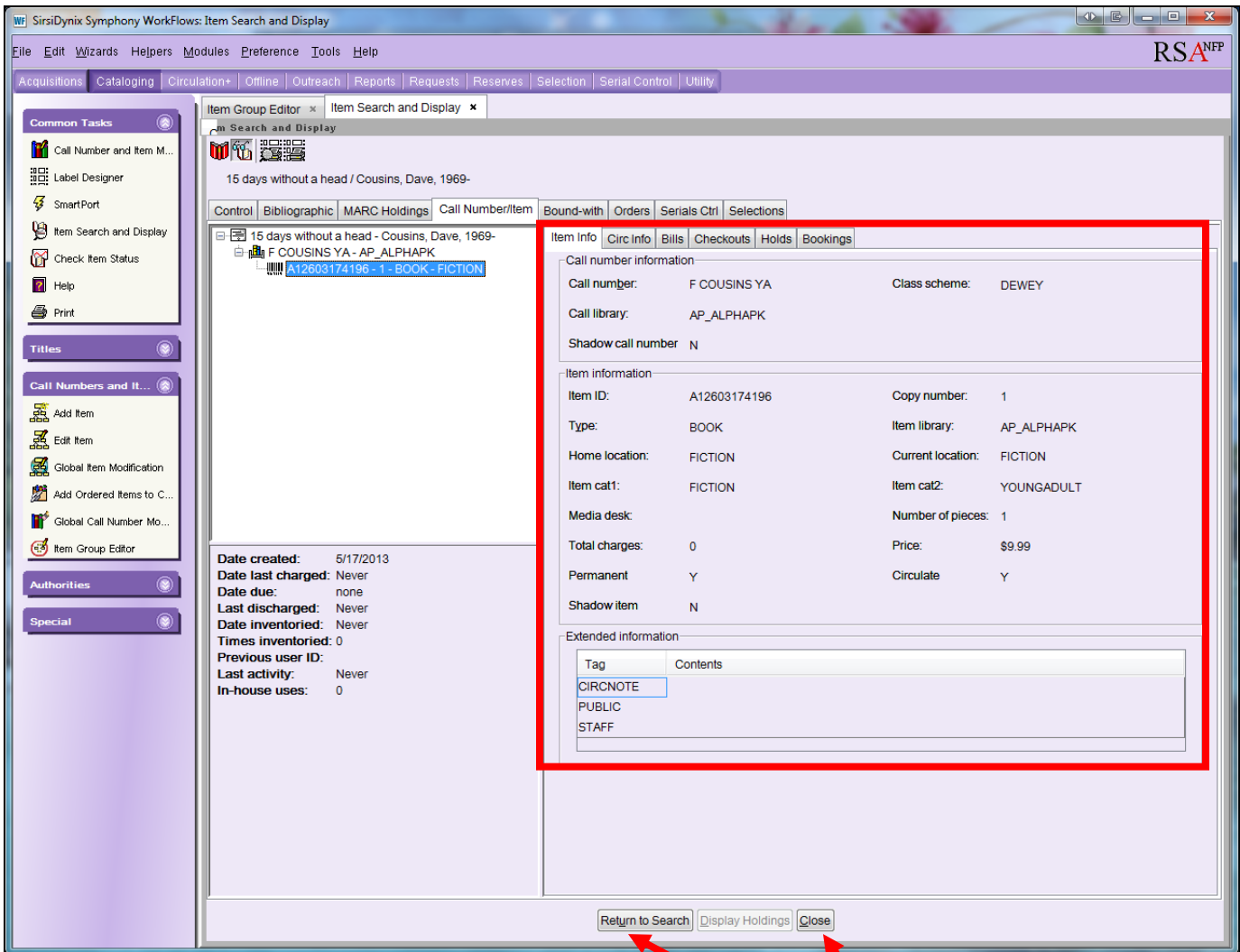
5. Once the record displays, click on the Call/Number Item tab if it is not already open:



6. Make sure the line with your library's item ID is highlighted in blue in the tree:



- 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.



- 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.
- 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.
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 advanced search screen opens. Search for the items you want to save as a group.

Resource Sharing Alliance

- 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.

The screenshot shows the 'Item Group Editor: Item Search' window. The interface includes a menu bar (File, Edit, Wizards, Helpers, Modules, Preference, Tools, Help), a toolbar (Acquisitions, Cataloging, Circulation+, Offline, Outreach, Reports, Requests, Reserves, Selection, Serial Control, Utility), and a sidebar with 'Common Tasks' (Call Number and Item..., Label Designer, SmartPort, Item Search and Display, Check Item Status, Help, Print), 'Titles', 'Call Numbers and I...', 'Authorities', and 'Special'. The main area contains search filters (Library: AP\_ALPHAPK, Home location: NEW-NF, etc.) and two tables. The top table, 'Result List: 1282 records, displaying 1-1000', has a circled 'Add selected' button in its top-left corner. The bottom table, 'Item List: 1000 records', is empty. At the bottom are buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'.

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Lower your taxes--...	Botkin, Sanford C.	336.241 BOT 2011	AP_ALPHAPK	A12602915426	1	BOOK	NEW-NF	Y
Pilates illustrated / ...	Page, Portia, 1962-	613.7192 PAG	AP_ALPHAPK	A12602916367	1	BOOK	CHECKEDOUT	N
The handy psycho...	Cohen, Lisa J.	150 COH	AP_ALPHAPK	A12602916163	1	BOOK	NEW-NF	Y
Vegan cooking for ...	Jamieson, Alexan...	641.5636 JAM	AP_ALPHAPK	A12602916341	1	BOOK	NEW-NF	Y
Standard encyclop...	Carwile, Mike.	748.2913 CAR 20...	AP_ALPHAPK	A12602938898	1	BOOK	NEW-NF	Y
Modern guns : ide...	Quertermous, Rus...	683.4 QUE 2011	AP_ALPHAPK	A12602938937	1	BOOK	CHECKEDOUT	N
Bass guitar exerci...	Pfeiffer, Patrick.	787.87 PFE	AP_ALPHAPK	A12602915036	1	BOOK	NEW-NF	Y
Small kitchen solu...	643.3 SMA	AP_ALPHAPK	A12602920853	1	BOOK	CHECKEDOUT	N	

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Lower your taxes--...	Botkin, Pamela ...	783.043 PHI	AP_ALPHAPK	A12602915167	1	BOOK	NEW-NF	Y
Boys and girls lear...	Gurian, Michael.	370.151 GUR	AP_ALPHAPK	A12602923241	1	BOOK	NEW-NF	Y
The stroke recover...	Burkman, Kip, 195...	616.8106 BUR 20...	AP_ALPHAPK	A12602893658	1	BOOK	NEW-NF	Y
The girl in the son...	Heatley, Michael.	782.4216 HEA	AP_ALPHAPK	A12602849081	1	BOOK	CHECKEDOUT	N
Fitness illustrated / ...	Sharkey, Brian J.	613.7 SHA	AP_ALPHAPK	A12602895090	1	BOOK	CHECKEDOUT	N
Fodor's 2011 Flori...	Harmesen, Debbie.	917.5904 FOD	AP_ALPHAPK	A12602896614	3	BOOK	CHECKEDOUT	N

**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.

Item Group Editor: Item Search

Library: AP\_ALPHAPK Home location: NEW-NF Price: Search

Date created: Date inventoried: Media desk: Clear

Item type: Item category 1: Item category 2:

Current location: Last activity date: Extended info: Single Advanced

Permanent:  Yes  No  Both Shaded:  Yes  No  Both Reserve status:  Single  Advanced

Circulate:  Yes  No  Both

Result List: 1282 records, displaying 1-1000

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Lower your taxes--...	Botkin, Sanford C.	336.241 BOT 2011	AP_ALPHAPK	A12602915426	1	BOOK	NEW-NF	Y
Pilates illustrated / ...	Page, Portia, 1962-	613.7192 PAG	AP_ALPHAPK	A12602916367	1	BOOK	CHECKEDOUT	N
The handy psycho...	Cohen, Lisa J.	150 COH	AP_ALPHAPK	A12602916163	1	BOOK	NEW-NF	Y
Vegan cooking for ...	Jamieson, Alexan...	641.5636 JAM	AP_ALPHAPK	A12602916341	1	BOOK	NEW-NF	Y
Standard encyclop...	Carwile, Mike.	748.2913 CAR 20...	AP_ALPHAPK	A12602938898	1	BOOK	NEW-NF	Y
Modern guns : ide...	Quertermous, Rus...	683.4 QUE 2011	AP_ALPHAPK	A12602938937	1	BOOK	CHECKEDOUT	N
Bass guitar exerci...	Pfeiffer, Patrick.	787.87 PFE	AP_ALPHAPK	A12602915036	1	BOOK	NEW-NF	Y
Small kitchen solu...	643.3 SMA	AP_ALPHAPK	A12602920853	1	BOOK	CHECKEDOUT	N	

Item List: 1000 records

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Lower your taxes--...	Botkin, Sanford C.	336.241 BOT 2011	AP_ALPHAPK	A12602915426	1	BOOK	NEW-NF	Y
Pilates illustrated / ...	Page, Portia, 1962-	613.7192 PAG	AP_ALPHAPK	A12602916367	1	BOOK	CHECKEDOUT	N
The handy psycho...	Cohen, Lisa J.	150 COH	AP_ALPHAPK	A12602916163	1	BOOK	NEW-NF	Y
Vegan cooking for ...	Jamieson, Alexan...	641.5636 JAM	AP_ALPHAPK	A12602916341	1	BOOK	NEW-NF	Y
Standard encyclop...	Carwile, Mike.	748.2913 CAR 20...	AP_ALPHAPK	A12602938898	1	BOOK	NEW-NF	Y
Modern guns : ide...	Quertermous, Rus...	683.4 QUE 2011	AP_ALPHAPK	A12602938937	1	BOOK	CHECKEDOUT	N
Bass guitar exerci...	Pfeiffer, Patrick.	787.87 PFE	AP_ALPHAPK	A12602915036	1	BOOK	NEW-NF	Y
Small kitchen solu...	643.3 SMA	AP_ALPHAPK	A12602920853	1	BOOK	CHECKEDOUT	N	
Singing for dummi...	Phillips, Pamela ...	783.043 PHI	AP_ALPHAPK	A12602915167	1	BOOK	NEW-NF	Y
Boys and girls lear...	Gurian, Michael.	370.151 GUR	AP_ALPHAPK	A12602923241	1	BOOK	NEW-NF	Y
The stroke recover...	Burkman, Kip, 195...	616.8106 BUR 20...	AP_ALPHAPK	A12602893658	1	BOOK	NEW-NF	Y
The girl in the son...	Heatley, Michael.	782.4216 HEA	AP_ALPHAPK	A12602849081	1	BOOK	CHECKEDOUT	N
Fitness illustrated /...	Sharkey, Brian J.	613.7 SHA	AP_ALPHAPK	A12602895090	1	BOOK	CHECKEDOUT	N
Fodor's 2011 Flori...	Harmsen, Debbie.	917.5904 FOD	AP_ALPHAPK	A12602896614	3	BOOK	CHECKEDOUT	N

Create Group Edit Items Remove Items Clear Item List Close



Resource Sharing Alliance

- 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.

The screenshot shows the 'Item Group Editor: Item Search' window. The interface includes a menu bar (File, Edit, Wizards, Helpers, Modules, Preference, Tools, Help), a toolbar (Acquisitions, Cataloging, Circulation+, Offline, Outreach, Reports, Requests, Reserves, Selection, Serial Control, Utility), and a sidebar with 'Common Tasks' (Call Number and Item..., Label Designer, SmartPort, Item Search and Display, Check Item Status, Help, Print), 'Titles', 'Call Numbers and L...', 'Authorities', and 'Special'. The main area contains search filters (Library: AP\_ALPHAPK, Home location: NEW-NF, etc.), search buttons (Search, Clear), and two result lists. The 'Result List' (1282 records, displaying 1001-1282) and 'Item List' (1282 records) both show a table of items with columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. The 'Create Group' button is highlighted by a red arrow.

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Antique trader radi...	Hustloen, Kyle.	621.384 ANT 2005	AP_ALPHAPK	A12602853161	1	BOOK	NEW-NF	Y
The unofficial LEG...	Bedford, Allan.	688.725 BED	AP_ALPHAPK	A12602848784	1	BOOK	INTRANSIT	Y
Grammar in plain ...	Diamond, Harriet.	428.2 DIA	AP_ALPHAPK	A12602853331	1	BOOK	NEW-NF	Y
Twelve extraordin...	MacArthur, John, 1...	220.9 MAC	AP_ALPHAPK	A12602834159	1	BOOK	CHECKEDOUT	N
Written in blood : a...	Fanning, Diane.	364.1523 FAN	AP_ALPHAPK	A12602823807	1	BOOK	NEW-NF	Y
The yeast connecti...	Crook, William G. (...)	616.969 CRO	AP_ALPHAPK	A12602805710	1	BOOK	NEW-NF	Y
The new coach's g...	Bass, Tom.	796.332 BAS	AP_ALPHAPK	A12602900293	1	BOOK	NEW-NF	Y
Extraordinary heal...	Brownstein, Arthur...	615.5 BRO	AP_ALPHAPK	A12602833404	1	BOOK	NEW-NF	Y

## 8. The Create Group window opens.

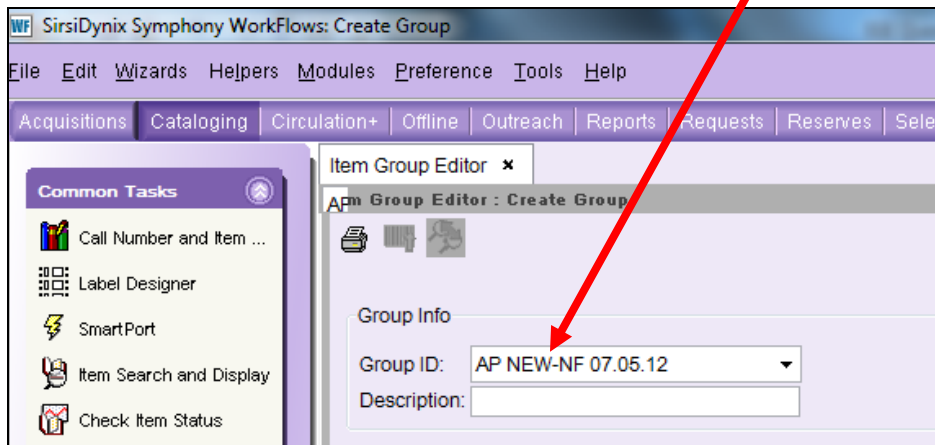
In the Group ID field, type a name for the group. The group ID may be up to 20 characters. Any text typed into the group ID field will automatically appear in uppercase.

**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.

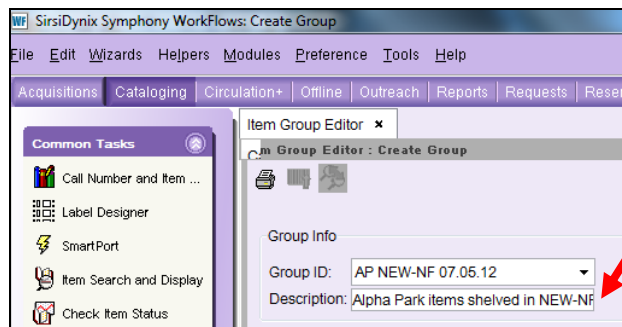
RSA recommends you create group IDs using these guidelines:

- **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)

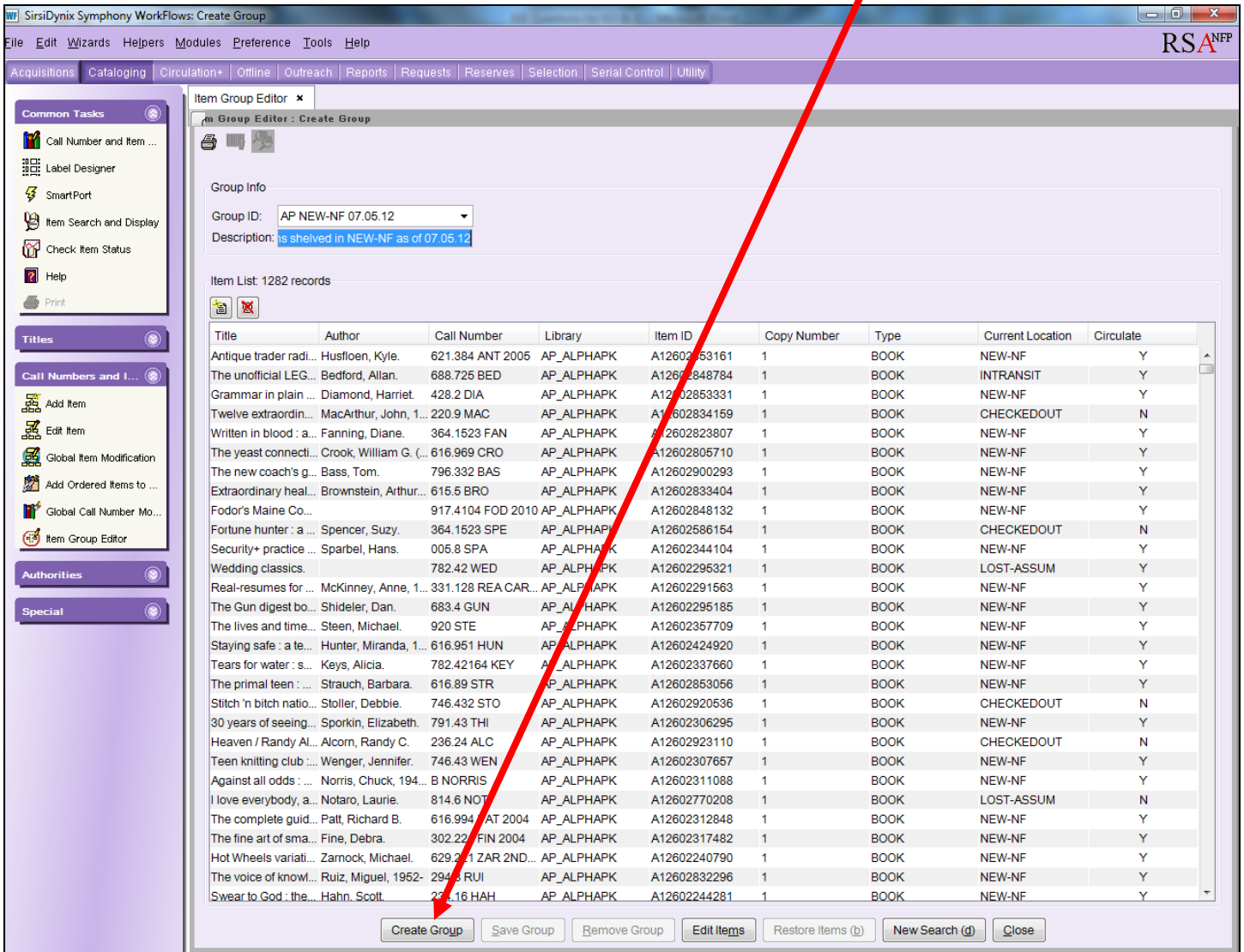
For example, for a list of Alpha Park Public Library's items that are currently shelved in the new nonfiction location, you would enter the group ID: AP NEW-NF 07.05.12



9. 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

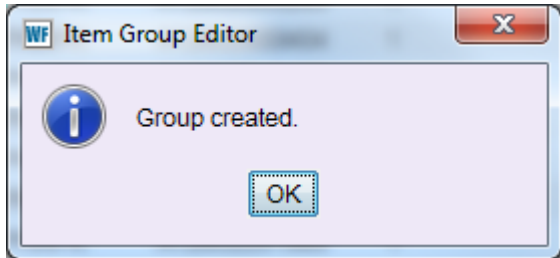


10. Once you have entered a group ID and description, click the “Create Group” button at the bottom.



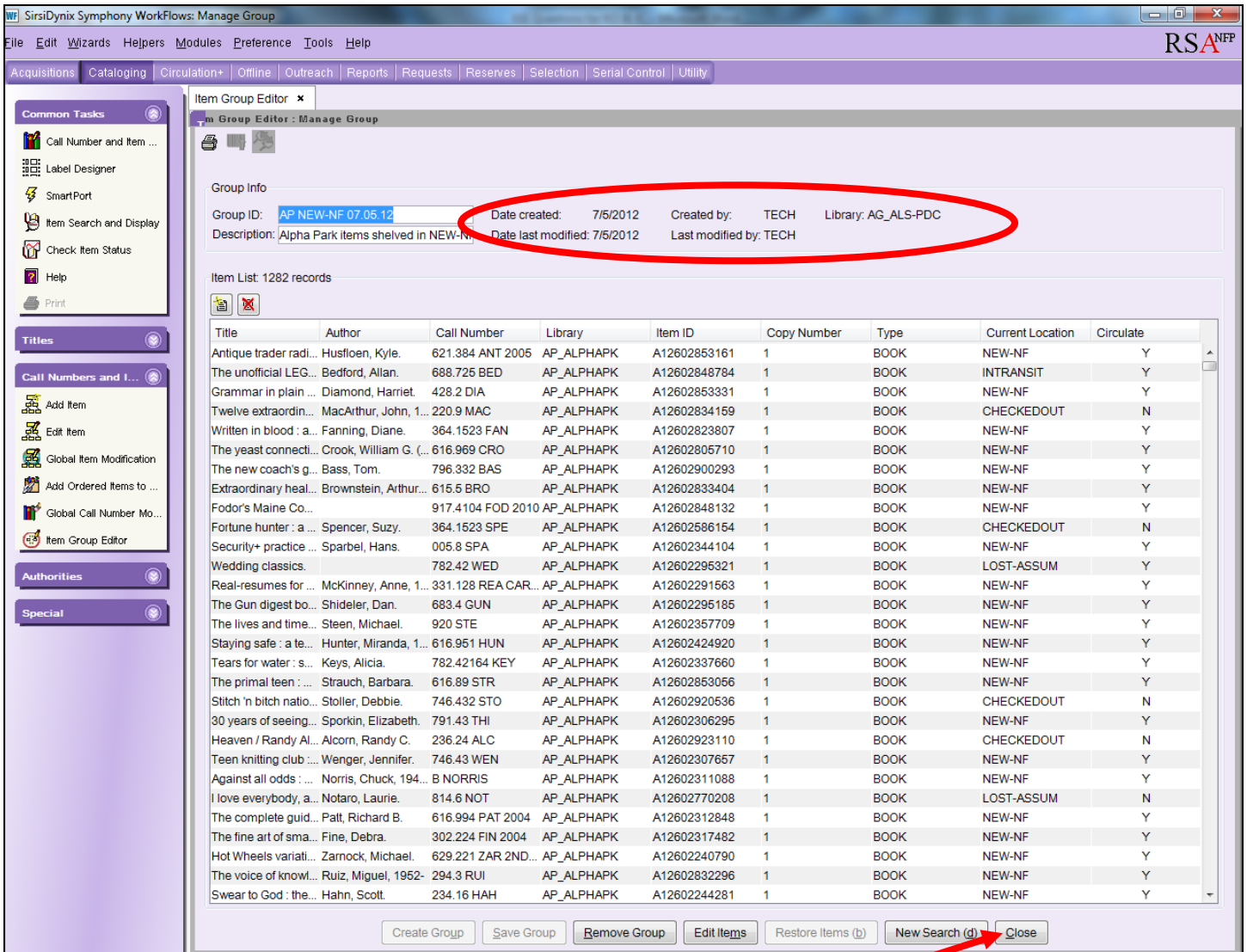
WorkFlows may take a minute or two to save the group, depending on its size.

11. A pop-up box will appear, confirming the “Group created.” Click OK to close the box.



12. 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



The screenshot shows the 'Item Group Editor' window. The 'Group Info' section is circled in red and contains the following information:

Group ID:	AP NEW-NF 07.05.12	Date created:	7/5/2012	Created by:	TECH	Library:	AG_ALS-PDC
Description:	Alpha Park items shelved in NEW-NF	Date last modified:	7/5/2012	Last modified by:	TECH		

The 'Item List' section shows 1282 records. The table below is a sample of the data:

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Antique trader radi...	Hustloen, Kyle.	621.384 ANT 2005	AP_ALPHAPK	A12602853161	1	BOOK	NEW-NF	Y
The unofficial LEG...	Bedford, Allan.	688.725 BED	AP_ALPHAPK	A12602848784	1	BOOK	INTRANSIT	Y
Grammar in plain ...	Diamond, Harriet.	428.2 DIA	AP_ALPHAPK	A12602853331	1	BOOK	NEW-NF	Y
Twelve extraordin...	MacArthur, John, 1...	220.9 MAC	AP_ALPHAPK	A12602834169	1	BOOK	CHECKEDOUT	N
Written in blood : a...	Fanning, Diane.	364.1523 FAN	AP_ALPHAPK	A12602823807	1	BOOK	NEW-NF	Y
The yeast connecti...	Crook, William G. (...)	616.969 CRO	AP_ALPHAPK	A12602805710	1	BOOK	NEW-NF	Y
The new coach's g...	Bass, Tom.	796.332 BAS	AP_ALPHAPK	A12602900293	1	BOOK	NEW-NF	Y
Extraordinary heal...	Brownstein, Arthur...	615.5 BRO	AP_ALPHAPK	A12602833404	1	BOOK	NEW-NF	Y
Fodor's Maine Co...		917.4104 FOD 2010	AP_ALPHAPK	A12602848132	1	BOOK	NEW-NF	Y
Fortune hunter : a ...	Spencer, Suzy.	364.1523 SPE	AP_ALPHAPK	A12602586154	1	BOOK	CHECKEDOUT	N
Security+ practice ...	Sparbel, Hans.	005.8 SPA	AP_ALPHAPK	A12602344104	1	BOOK	NEW-NF	Y
Wedding classics.		782.42 WED	AP_ALPHAPK	A12602295321	1	BOOK	LOST-ASSUM	Y
Real-resumes for ...	McKinney, Anne, 1...	331.128 REA CAR...	AP_ALPHAPK	A12602291563	1	BOOK	NEW-NF	Y
The Gun digest bo...	Shideler, Dan.	683.4 GUN	AP_ALPHAPK	A12602295185	1	BOOK	NEW-NF	Y
The lives and time...	Steen, Michael.	920 STE	AP_ALPHAPK	A12602357709	1	BOOK	NEW-NF	Y
Staying safe : a te...	Hunter, Miranda, 1...	616.951 HUN	AP_ALPHAPK	A12602424920	1	BOOK	NEW-NF	Y
Tears for water : s...	Keys, Alicia.	782.42164 KEY	AP_ALPHAPK	A12602337660	1	BOOK	NEW-NF	Y
The primal teen : ...	Strauch, Barbara.	616.89 STR	AP_ALPHAPK	A12602853056	1	BOOK	NEW-NF	Y
Stitch 'n bitch natio...	Stoller, Debbie.	746.432 STO	AP_ALPHAPK	A12602920536	1	BOOK	CHECKEDOUT	N
30 years of seeing...	Sporkin, Elizabeth.	791.43 THI	AP_ALPHAPK	A12602306295	1	BOOK	NEW-NF	Y
Heaven / Randy Al...	Alcorn, Randy C.	236.24 ALC	AP_ALPHAPK	A12602923110	1	BOOK	CHECKEDOUT	N
Teen knitting club ...	Wenger, Jennifer.	746.43 WEN	AP_ALPHAPK	A12602307657	1	BOOK	NEW-NF	Y
Against all odds : ...	Norris, Chuck, 194...	B NORRIS	AP_ALPHAPK	A12602311088	1	BOOK	NEW-NF	Y
I love everybody, a...	Notaro, Laurie.	814.6 NOT	AP_ALPHAPK	A12602770208	1	BOOK	LOST-ASSUM	N
The complete guid...	Patt, Richard B.	616.994 PAT 2004	AP_ALPHAPK	A12602312848	1	BOOK	NEW-NF	Y
The fine art of sma...	Fine, Debra.	302.224 FIN 2004	AP_ALPHAPK	A12602317482	1	BOOK	NEW-NF	Y
Hot Wheels variati...	Zarnock, Michael.	629.221 ZAR 2ND...	AP_ALPHAPK	A12602240790	1	BOOK	NEW-NF	Y
The voice of knowl...	Ruiz, Miguel, 1952-	294.3 RUI	AP_ALPHAPK	A12602832296	1	BOOK	NEW-NF	Y
Swear to God : the...	Hahn, Scott.	234.16 HAH	AP_ALPHAPK	A12602244281	1	BOOK	NEW-NF	Y

At the bottom of the window, there are several buttons: 'Create Group', 'Save Group', 'Remove Group', 'Edit Items', 'Restore Items (b)', 'New Search (d)', and 'Close'. A red arrow points to the 'Close' button.

13. 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.

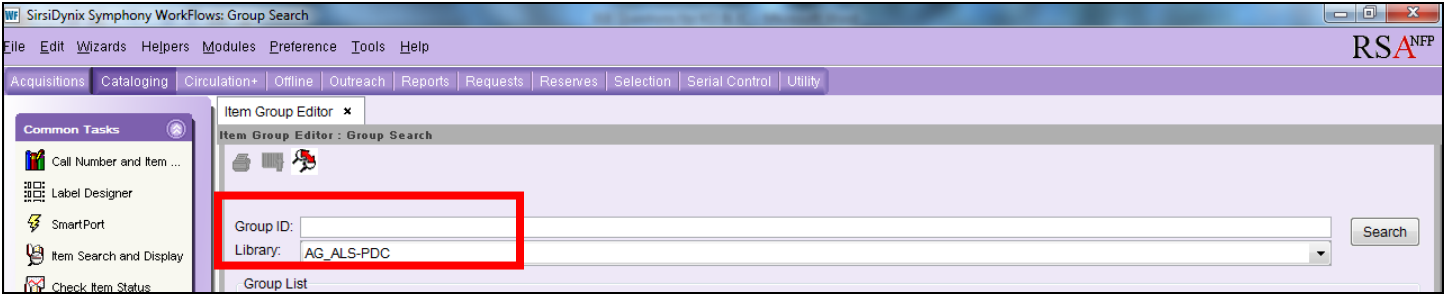
1. Log into WorkFlows using your individual cataloging account.
2. Go to the Cataloging module.
3. Open the Call Numbers and Items toolbar on the left.
4. Put your cursor over the Item Group Editor wizard and *left* click.
5. The advanced search screen opens. Click the Item/Group Search helper button:



6. The Group Search screen opens.

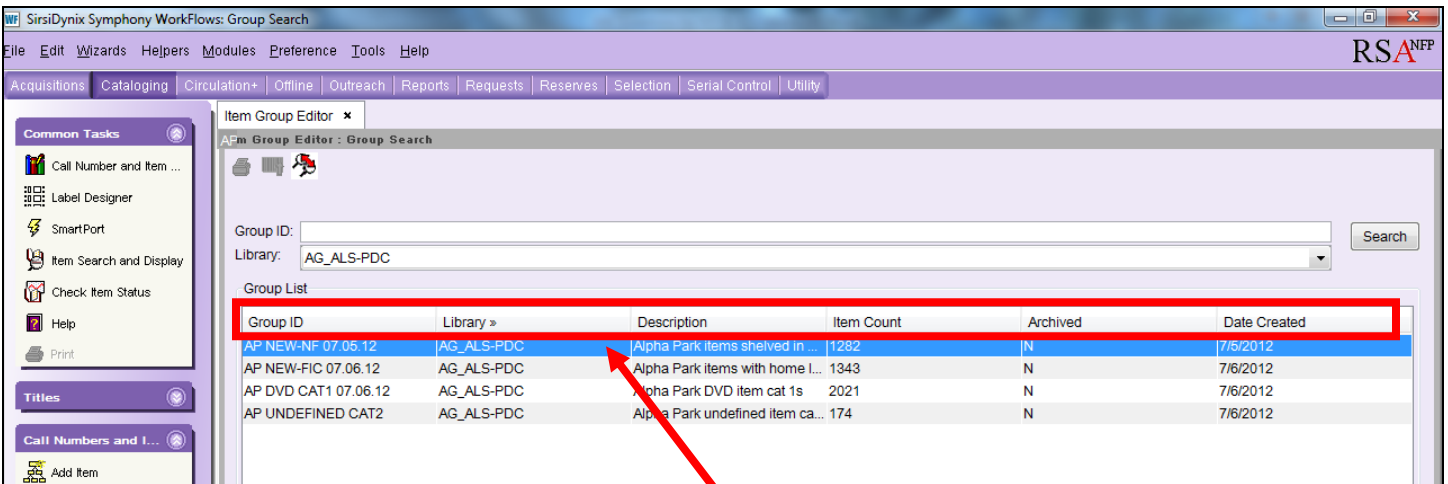
**To retrieve a list of all groups created by your library:**

- a. Leave the group ID box blank.
- b. Select your WorkFlows code from the Library drop-down menu.



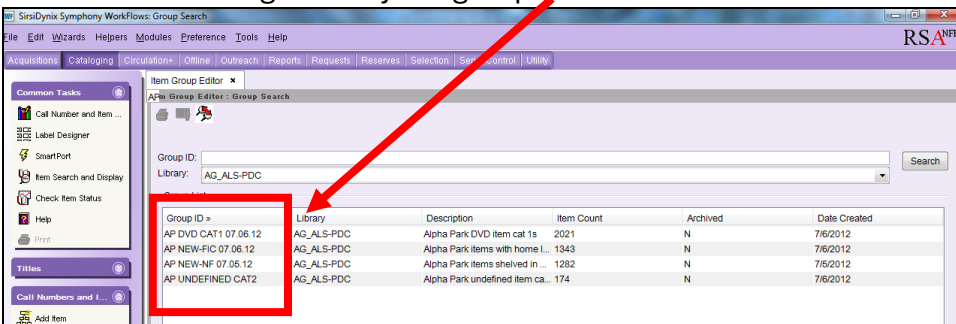
c. Click the Search button or hit <Enter> on your keyboard.

The item group editor wizard will retrieve a list of all groups created by your library:



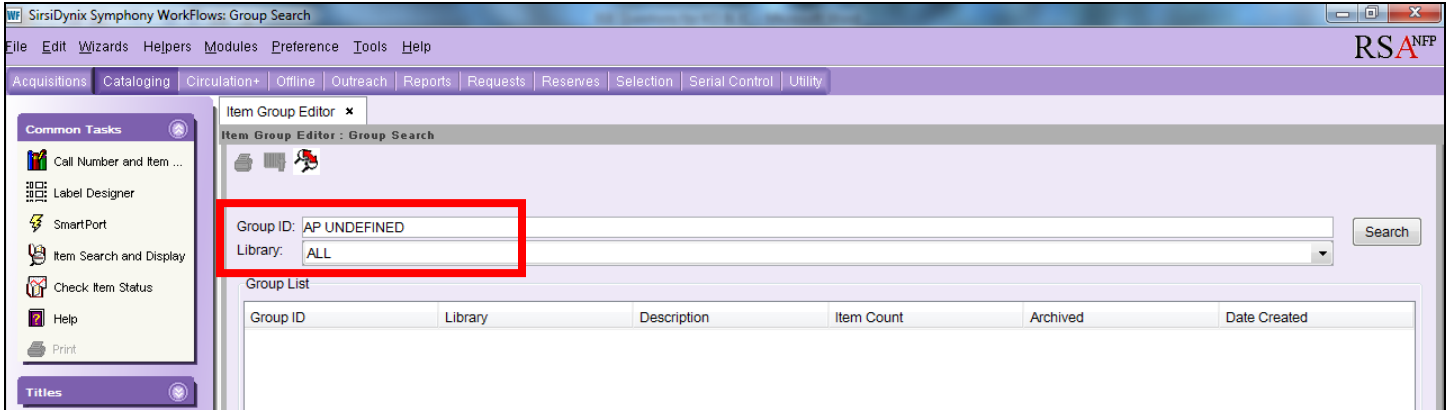
You can re-sort the list of groups by clicking on any of the column headings. Contents in the list can be sorted in ascending or descending order.

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:



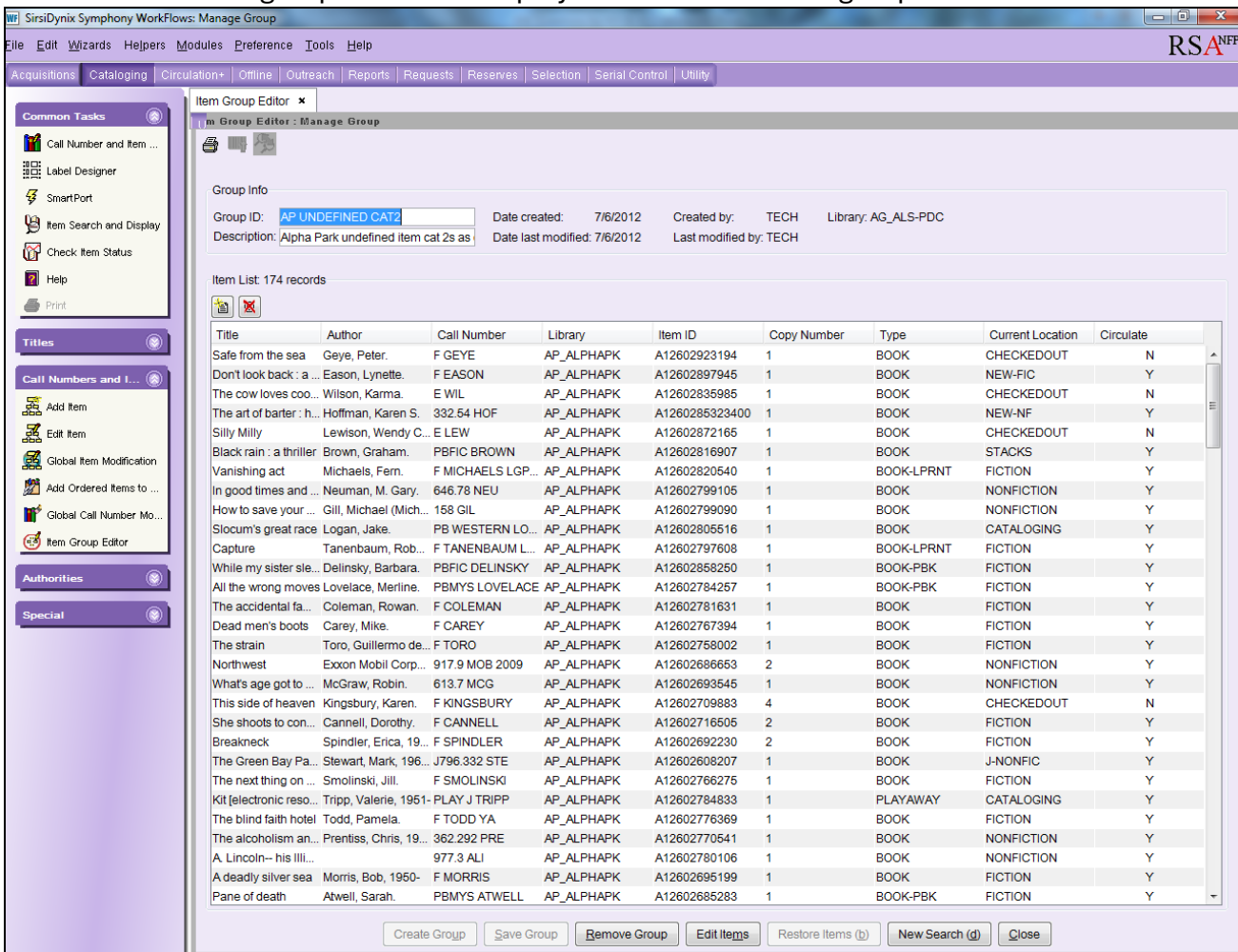
**To retrieve a specific group created by your library:**

- 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.
- You can leave the library selection as "ALL," or you can select your library from the drop-down menu.



- 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.
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.

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



The screenshot shows the SirsiDynix Symphony WorkFlows Item Search interface. The window title is "SirsiDynix Symphony WorkFlows: Item Search". The menu bar includes "File", "Edit", "Wizards", "Helpers", "Modules", "Preference", "Tools", and "Help". The main menu includes "Acquisitions", "Cataloging", "Circulation+", "Offline", "Outreach", "Reports", "Requests", "Reserves", "Selection", "Serial Control", and "Utility".

On the left side, there are several toolbars: "Common Tasks" (Call Number and Item..., Label Designer, SmartPort, Item Search and Display, Check Item Status, Help, Print), "Titles", "Call Numbers and I..." (Add Item, Edit Item, Global Item Modification, Add Ordered Items to..., Global Call Number Mo..., Item Group Editor), "Authorities", and "Special".

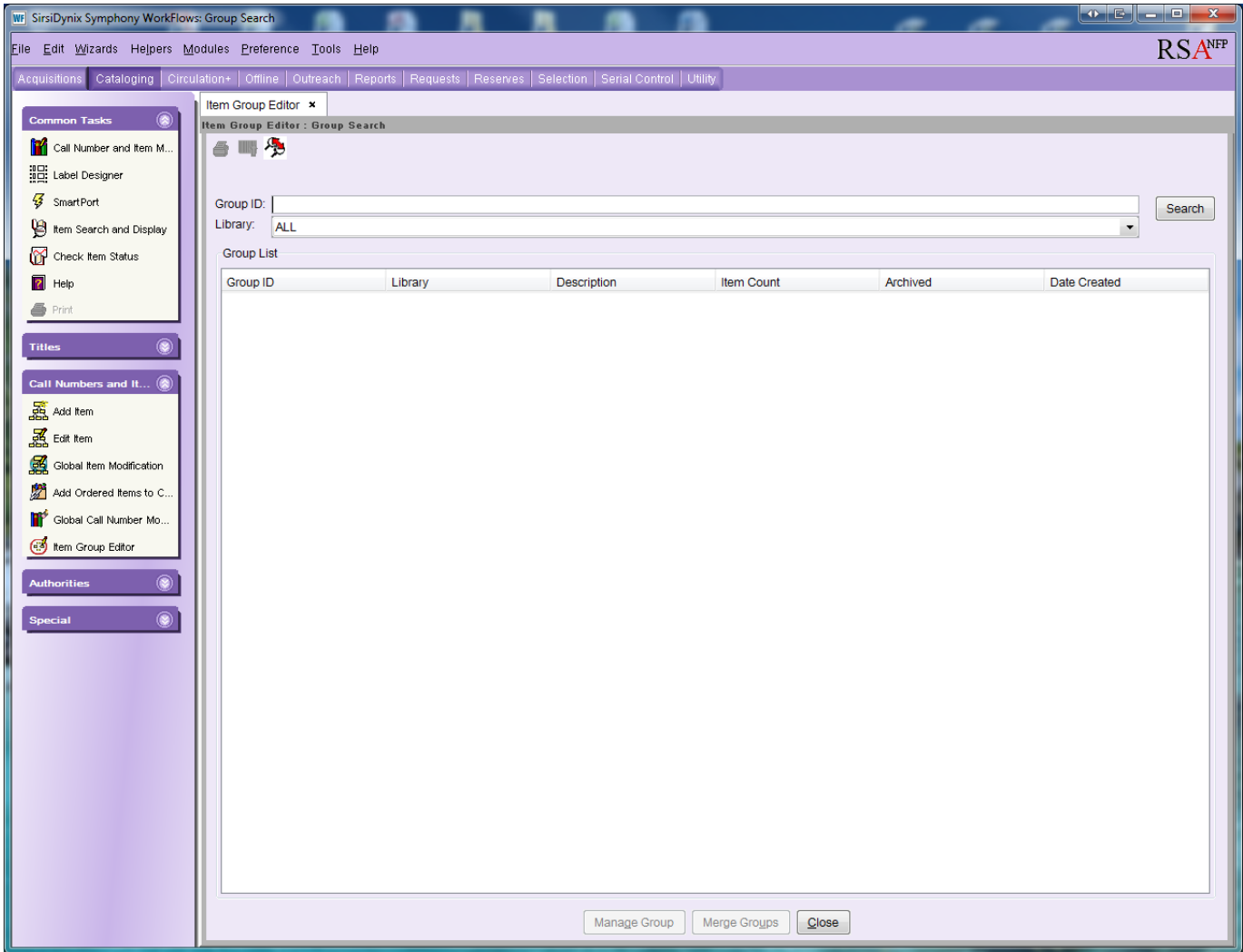
The main area is titled "Item Group Editor" and contains a toolbar with a red arrow pointing to the "Item Search" button. Below the toolbar are search filters for Library, Home location, Price, Date created, Date inventoried, Media desk, Item type, Item category 1, Item category 2, Current location, Last activity date, Extended info, Permanent, Shaded, Reserve status, and Circulate. There are "Search" and "Clear" buttons, and radio buttons for "Single" and "Advanced" search modes.

Below the filters are two tables: "Titles" and "Item List". Both tables have columns for Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. The "Item List" table is currently empty.

At the bottom of the window, there are buttons for "Create Group", "Edit Items", "Remove Items", "Clear Item List", and "Close".



The Group Search screen opens:



## 5. 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:

Group ID: W0  
Library: ALL

Group ID	Library	Description	Item Count	Archived	Date Created
W0 2PC DVD	W0_WASH-PL	2 pc DVDs as of 9/19/2012	137	N	9/19/2012
W0 ADULT XMAS 2	W0_WASH-PL	W0 adult christmas display 2	30	N	12/5/2012
W0 ADULT XMAS REVISD	W0_WASH-PL	ADULT XMAS AS OF DEC 1 ...	135	N	12/1/2012
W0 BLACK HISTORY MON	W0_WASH-PL	DISPLAY FOR BLACK HIST...		N	1/25/2013
W0 CD	W0_WASH-PL	2 pc CDs as of 9/21/12	77	N	9/21/2012
W0 END OF WORLD	W0_WASH-PL	emily's end of world display	20	N	11/7/2012
W0 END OF WORLD DISP	W0_WASH-PL	end of world display part 2 a...	17	N	11/8/2012
W0 GARDEN	W0_WASH-PL	W0 GARDEN-FLOWER DIS...	20	N	3/29/2013
W0 J HALLOWEEN	W0_WASH-PL	KIDS HALL-WEEN AS OF 9/...	146	N	9/27/2012
W0 JDVDS	W0_WASH-PL	BATCH- DVDs MOSTLY KI...	30	N	9/21/2012
W0 KIDS CHRISTMAS	W0_WASH-PL	Christmas display for kids as...	206	N	11/27/2012
W0 KIDS EASTER	W0_WASH-PL	Kids Easter & Spring as of 2/...	107	N	2/15/2013
W0 KIDS ST PATS	W0_WASH-PL	kids st patricks display	29	N	3/20/2013
W0 KIDS THANKSGIVING	W0_WASH-PL	THANKSGIVING KIDS DISP...	45	N	11/27/2012
W0 MYSTERY	W0_WASH-PL	W0 MYSTERY DISPLAY AS ...	42	N	2/26/2013
W0 PROM DISPLAY	W0_WASH-PL	w0 Prom Display	18	Y	4/11/2013
W0 RESOLUTION DISPLY	W0_WASH-PL	W0 NEW YEARS RESOLUTI...	38	N	1/2/2013
W0 STEAMPUNK	W0_WASH-PL	w0 steampunk display	45	N	4/11/2013
W0 VALENTINE-KIDS	W0_WASH-PL	VALENTINES DAY DISPLAY...	51	N	1/25/2013
W0 YA FEB DISPLAY	W0_WASH-PL	YA FEB "LOVE" BOOKS AS ...	27	N	1/25/2013
W0 YA HALLOWEEN	W0_WASH-PL	emily's halloween display as...	42	N	11/7/2012
W0 YA MONSTR DISPLAY	W0_WASH-PL	ya monster display 10/9/12	51	N	10/9/2012

Manage Group Merge Groups Close

## 6. Click the "Manage Group" button at the bottom.

The item group editor will display the group:

The screenshot shows the 'Item Group Editor: Manage Group' window. At the top, it displays 'Group Info' with the following details:

- Group ID: **W0 VALENTINE-KIDS**
- Date created: 1/25/2013
- Created by: W0\_TECH
- Library: W0\_WASH-PL
- Description: **VALENTINES DAY DISPLAY-KIDS A**
- Date last modified: 2/15/2013
- Last modified by: W0\_TECH

Below this is the 'Item List: 50 records' section, which contains a table with the following columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. The table lists 50 records of books related to Valentine's Day.

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
If you'll be my Val...	Rylant, Cynthia.	E RYL	W0_WASH-PL	A66701096534	1	BOOK-J	EASY	Y
Love, Ruby Valen...	Friedman, Laurie ...	E FRI	W0_WASH-PL	A66701245793	1	BOOK-J	EASY	Y
Valentine's day	Trueit, Trudi Strain.	E TRU	W0_WASH-PL	A66701627555	1	BOOK-J	EASY	Y
Dragon : Happy V...	Reyes, Gabrielle.	E REY	W0_WASH-PL	A66701588751	1	BOOK-J	EASY	Y
A giant crush	Choldenko, Genni...	E CHO	W0_WASH-PL	A66701667092	1	BOOK-J	EASY	Y
A very scary Vale...	Balaban, Mariah, ...	E BAL	W0_WASH-PL	A66701588769	1	BOOK-J	CHECKEDOUT	N
Franklin's valentin...	Bourgeois, Paulet...	E BOU	W0_WASH-PL	A66700841384	1	BOOK-J	EASY	Y
Be my valentine!	Bryant, Megan E.	E BRY	W0_WASH-PL	A66701254661	1	BOOK-J	CHECKEDOUT	N
Pooth's Valentine	Gaines, Isabel.	E GAI	W0_WASH-PL	A66701173069	1	BOOK-J	CHECKEDOUT	N
Valentine's Day d...	Herman, Gail, 19...	E HER	W0_WASH-PL	A66700898640	1	BOOK-J	EASY	Y
Don't be my valen...	Lexau, Joan M.	E LEX	W0_WASH-PL	A66700564102	1	BOOK-J	MISSING	N
Too many valent!...	McNamara, Marg...	E MCN	W0_WASH-PL	A66700972868	1	BOOK-J	EASY	Y
Little Bear's valent...	Minarik, Else Hol...	E MIN	W0_WASH-PL	A66700971749	1	BOOK-J	EASY	Y
Amelia Bedelia's f...	Parish, Herman.	E PAR	W0_WASH-PL	A66701485602	1	BOOK-J	CHECKEDOUT	N
My honey Valentine	Parent, Nancy.	E PAR	W0_WASH-PL	A66700700944	1	BOOK-J	CHECKEDOUT	N
Happy Valentine's...	Samuels, Barbara.	E SAM	W0_WASH-PL	A66701170760	1	BOOK-J	EASY	Y
Care Bears : love ...	Sander, Sonia.	E SAN	W0_WASH-PL	A66701404698	1	BOOK-J	EASY	Y
Somebody loves ...	Spinelli, Eileen.	E SPI	W0_WASH-PL	A66700321392	1	BOOK-J	EASY	Y
Cam Jansen and ...	Adler, David A.	J ADL	W0_WASH-PL	A66701170891	1	BOOK-J	CHECKEDOUT	N
Hearts, cupids, an...	Barth, Edna.	J 394.2 BAR	W0_WASH-PL	A66700162714	1	BOOK-J	J-NONFIC	Y
St Valentine	Sabuda, Robert.	J 270.1092 SAB	W0_WASH-PL	A66700305053	1	BOOK-J	J-NONFIC	Y
Junie B. Jones an...	Park, Barbara.	J PAR	W0_WASH-PL	A66700748887	1	BOOK-J	J-FICTION	Y
A spy among the ...	Naylor, Phyllis Re...	J NAY	W0_WASH-PL	A66700809633	1	BOOK-J	CHECKEDOUT	N
Danny's mystery v...	Kunhardt, Edith.	BOOK/CASS E K...	W0_WASH-PL	A66700481003	1	BOOK-CAS-J	J-AUDIOBK	Y
Valentine's Day : t...	Supraner, Robyn.	J 745.5941 SUP	W0_WASH-PL	A66700192426	1	BOOK-J	J-NONFIC	Y
Things to make a...	DePaola, Tomie, ...	J 745.59 DEP	W0_WASH-PL	A66700192272	1	BOOK-J	J-NONFIC	Y
Froggy's first kiss	London, Jonathan...	E LON	W0_WASH-PL	A66700685958	1	BOOK-J	EASY	Y
Be my valentine	Wells, Rosemary.	E WEL	W0_WASH-PL	A66700898771	1	BOOK-J	EASY	Y

At the bottom of the window, there are several buttons: Create Group, Save Group, Remove Group, Edit Items, Restore Items (t), New Search (d), and Close.

Resource Sharing Alliance

7. Go to the File menu in the upper left corner. Select “Print Screen”:

The screenshot shows the 'SirsiDynix Symphony Workflows: Manage Group' application window. The 'File' menu is open, and the 'Print Screen' option is highlighted with a red arrow. The main window displays the 'Item Group Editor: Manage Group' interface. The 'Group Info' section shows the following details:

- 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 11/7/2012
- Date last modified: 11/7/2012
- Last modified by: W0\_TECH

The 'Item List' section shows 42 records. The table below contains the following data:

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. V...	Schreiber, Ellen.	YA FIC SCH	W0_WASH-PL	A66701395792	1	BOOK-YA	YA-MANGA	Y
Companions of th...	Vande Velde, Vivi...	YA FIC VAN	W0_WASH-PL	A66701025266	1	BOOK-PBKYA	YA-FIC	Y
The Illinois road g...	Lewis, Chad.	133.109 LEW	W0_WASH-PL	A66701478980	1	BOOK	NONFICTION	Y
Ghost stories of Illi...	Christensen, Jo-A...	133.1 CHR	W0_WASH-PL	A66700947805	1	BOOK	NONFICTION	Y
Paranormal Amer...	Bader, Christophe...	130.973 BAD	W0_WASH-PL	A66701571542	1	BOOK	NONFICTION	Y
Exploring the une...	Knauer, Kelly.	YA 001.94 EXP	W0_WASH-PL	A66701264331	1	BOOK-YA	YA-NF	Y
Possessions and ...	Kallen, Stuart A., ...	YA 133.4 KAL	W0_WASH-PL	A66701487086	1	BOOK-YA	YA-NF	Y
Poltergeists	Kallen, Stuart A., ...	YA 133.142 KAL	W0_WASH-PL	A66701486967	1	BOOK-YA	YA-NF	Y
The I-Files : true r...	Rath, Jay.	133.1 RAT	W0_WASH-PL	A66700789582	1	BOOK	NONFICTION	Y
Haunted houses	Netzley, Patricia D.	YA 133.1 NET	W0_WASH-PL	A66701488008	1	BOOK-YA	YA-NF	Y
Ghosthunting Illin...	Kachuba, John B.	133.1 KAC	W0_WASH-PL	A66701412154	1	BOOK	NONFICTION	Y
Too good to be tru...	Brunvand, Jan Ha...	YA 398.2 BRU	W0_WASH-PL	A66701502535	1	BOOK-YA	YA-NF	Y
Haunted		YA SS HAU	W0_WASH-PL	A66701459724	1	BOOK-YA	YA-FIC	Y
30 days of night	Niles, Steve.	YA FIC NIL	W0_WASH-PL	A66701298275	1	BOOK-YA	YA-GRAPHIC	Y
Ruined : a novel	Morris, Paula.	YA FIC MOR	W0_WASH-PL	A66701502129	1	BOOK-YA	YA-FIC	Y
House of dark sha...	Liparulo, Robert.	YA FIC LIP	W0_WASH-PL	A66701477243	1	BOOK-YA	CHECKEDOUT	N
What-the-Dickens...	Maguire, Gregory.	YA FIC MAG	W0_WASH-PL	A66701331918	1	BOOK-YA	YA-FIC	Y
The white darkne...	McCaughrean, G...	YA FIC MCC	W0_WASH-PL	A66701321468	1	BOOK-YA	YA-FIC	Y
The dreaming. Vo...	Chan, Queenie.	YA FIC CHA	W0_WASH-PL	A66701187961	1	BOOK-YA	YA-MANGA	Y
Haunted Illinois : ...	Taylor, Troy.	133.109 TAY	W0_WASH-PL	A66700856949	1	BOOK	DISP-YA	Y
Dangerous girls : ...	Stine, R. L.	YA FIC STI	W0_WASH-PL	A66701057611	1	BOOK-PBKYA	YA-FIC	Y
Who killed the ho...	Stine, R. L.	YA FIC STI	W0_WASH-PL	A66700693171	1	BOOK-PBKYA	YA-FIC	Y
Cat	Stine, R. L.	YA FIC STI	W0_WASH-PL	A66700599199	1	BOOK-PBKYA	YA-FIC	Y
The confession	Stine, R. L.	YA FIC STI	W0_WASH-PL	A66700540776	1	BOOK-PBKYA	YA-FIC	Y
Gallows Hill	Duncan, Lois, 193...	YA FIC DUN	W0_WASH-PL	A66700686140	1	BOOK-PBKYA	YA-FIC	Y
Weird Illinois : you...	Taylor, Troy.	YA 917.73 TAY	W0_WASH-PL	A66701598439	1	BOOK-YA	YA-NF	Y

Resource Sharing Alliance

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

The screenshot shows a web browser window with the address bar displaying a local file path. The browser's toolbar includes various search engines and utility icons. The main content area is titled 'Item Group Editor : Manage Group' and shows the date '05/28/2013'. Below the title, there is a 'Group Info' section with details about the group ID, description, creation date, and library. A table below lists 42 records, with the first 10 rows visible. The table has columns for Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate.

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., 1955-	YA 133.4 KAL	W0_WASH-PL	A66701486967	1	BOOK-YA	YA-NF	Y

- 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

Resource Sharing Alliance

10. Once all the text is highlighted in blue, right click with your mouse. Select “Copy” from the menu:

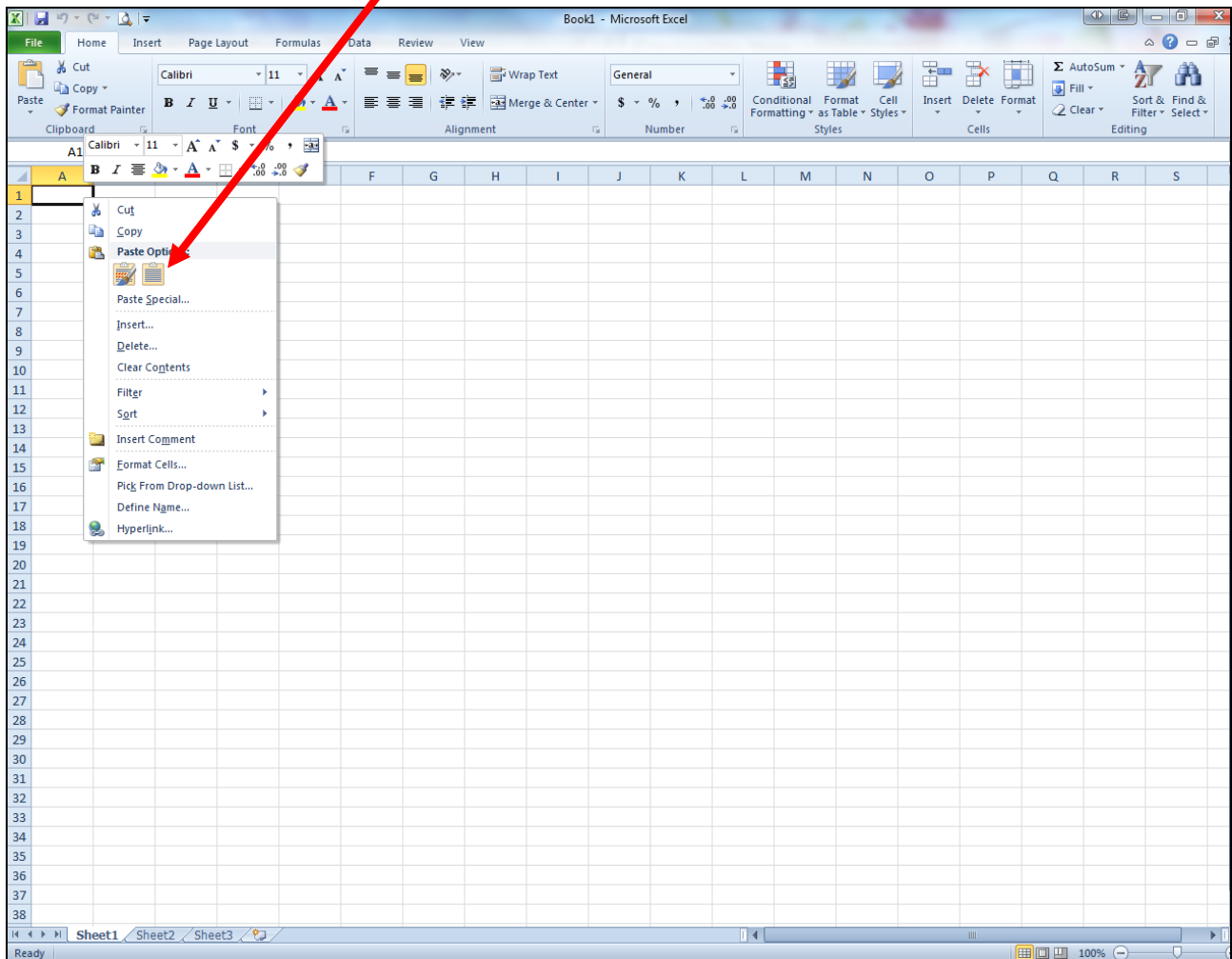
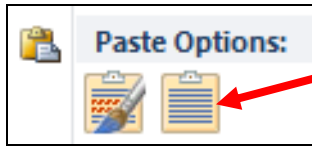
The screenshot shows a web browser window displaying a table of book records. The table has multiple columns, including titles, authors, call numbers, and genres. A red arrow points from the instruction above to a right-click context menu that is open over the table. The menu options include Copy, Paste, Select all, Print..., Print preview..., Blogger, Define with Google Dictionary, Gmail, Google Finance, Google Maps, Search with Google, Translate with Bing, All Accelerators, and Send to OneNote. The table data is as follows:

Title	Author	Call Number	Genre	Other
Weird Illinois : your travel guide to Illinois' local legends and best kept secrets	Taylor, Troy.	YA 917.73 W0_WASH- A66701598439	BOOK- YA-NF	1 Y
Encyclopedia horridica : the terrifying truth about vampires, ghosts, monsters, and more	Gee, Joshua.	YA 001.9 W0_WASH- A66701682589	BOOK- YA-NF	1 Y
American vampire. [1]	Snyder, Scott.	YA FIC W0_WASH- A66701542894	BOOK- YA-GRAPHIC	1 Y
Cursed creatures		YA SS W0_WASH- A66701459732	BOOK- YA-FIC	1 Y
Pride and Prejudice and zombies : the graphic novel	Grahame-Smith, Seth.	YA FIC W0_WASH- A66701540973	BOOK- YA-GRAPHIC	1 Y
Skulduggery Pleasant	Landy, Derek.	YA FIC W0_WASH- A66701546505	BOOK- YA-FIC	1 Y
Vampire knight. Vol. 1	Hino, Matsuri.	YA FIC W0_WASH- A66701462939	BOOK- YA-MANGA	1 Y
Stoker's Dracula	Thomas, Roy, 1940-	YA FIC W0_WASH- A66701147678	BOOK- YA-GRAPHIC	1 Y
Texas gothic	Clement-Moore, Rosemary.	YA FIC W0_WASH- A66701644141	BOOK- YA-FIC	1 Y
Shelter : a Mickey Bolitar novel	Coben, Harlan, 1962-	YA FIC W0_WASH- A66701626541	BOOK- YA-FIC	1 Y
The haunting of Alazabel Cray	Wooding, Chris, 1977-	YA FIC W0_WASH- A66701626541	BOOK- YA-FIC	1 Y
The monstrumologist : William James Henry	Yancey, Richard.	YA FIC W0_WASH- A66701626541	BOOK- YA-FIC	1 Y
Complete stories and poems of Edgar Allan Poe	Poe, Edgar Allan, 1809-1849.	810.81 W0_WASH- A66701626541	BOOK- NONFICTION	1 Y
Gothic! : ten original dark tales	Noyes, Deborah.	YA SS W0_WASH- A66701626541	BOOK- YA-FIC	1 Y
The encyclopedia of monsters	Rovin, Jeff.	YA 001.944 W0_WASH- A66701626541	BOOK- YA-NF	1 Y

11. Open Microsoft Excel.

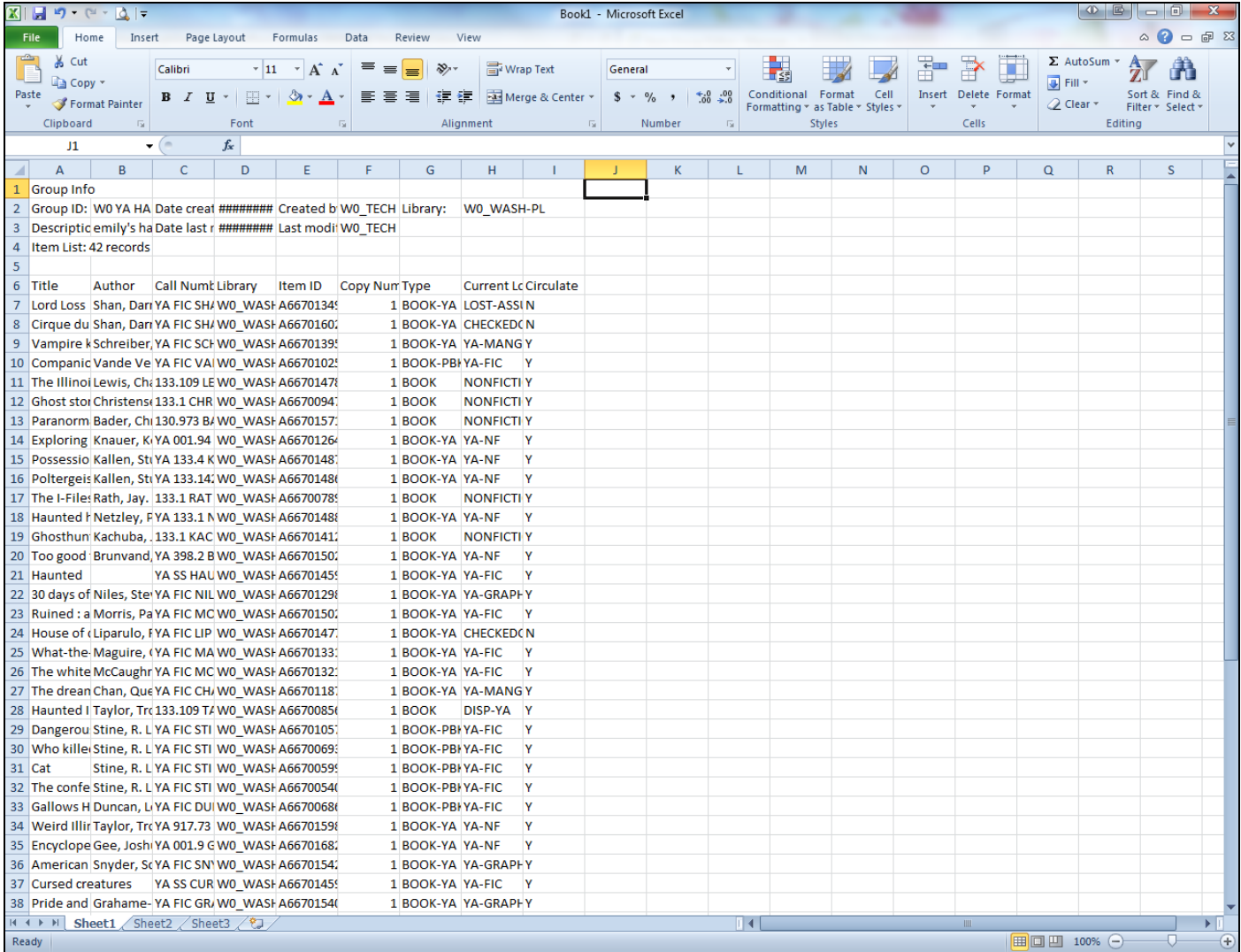
12. Right click on the first cell in the Excel spreadsheet and select Paste.

If there is more than one “Paste” option in the menu, select the option to “Match Destination Formatting”:





13. 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

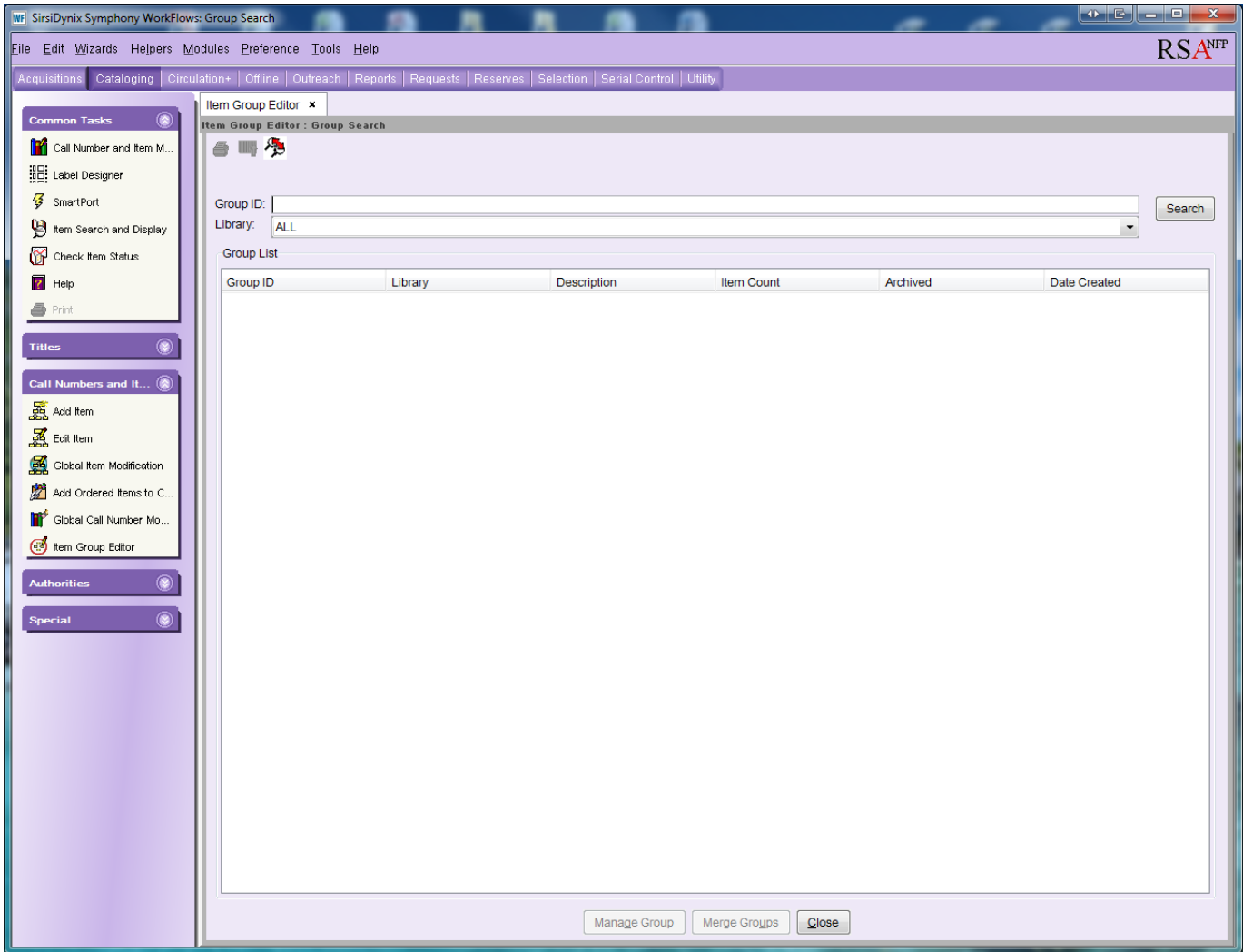
WorkFlows will only allow you to add items to a group created by your library. WorkFlows will not allow you to add items to groups created by other RSA libraries.

1. Log into WorkFlows using your individual cataloging account.
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 advanced search screen opens. Click the Item/Group Search helper button:



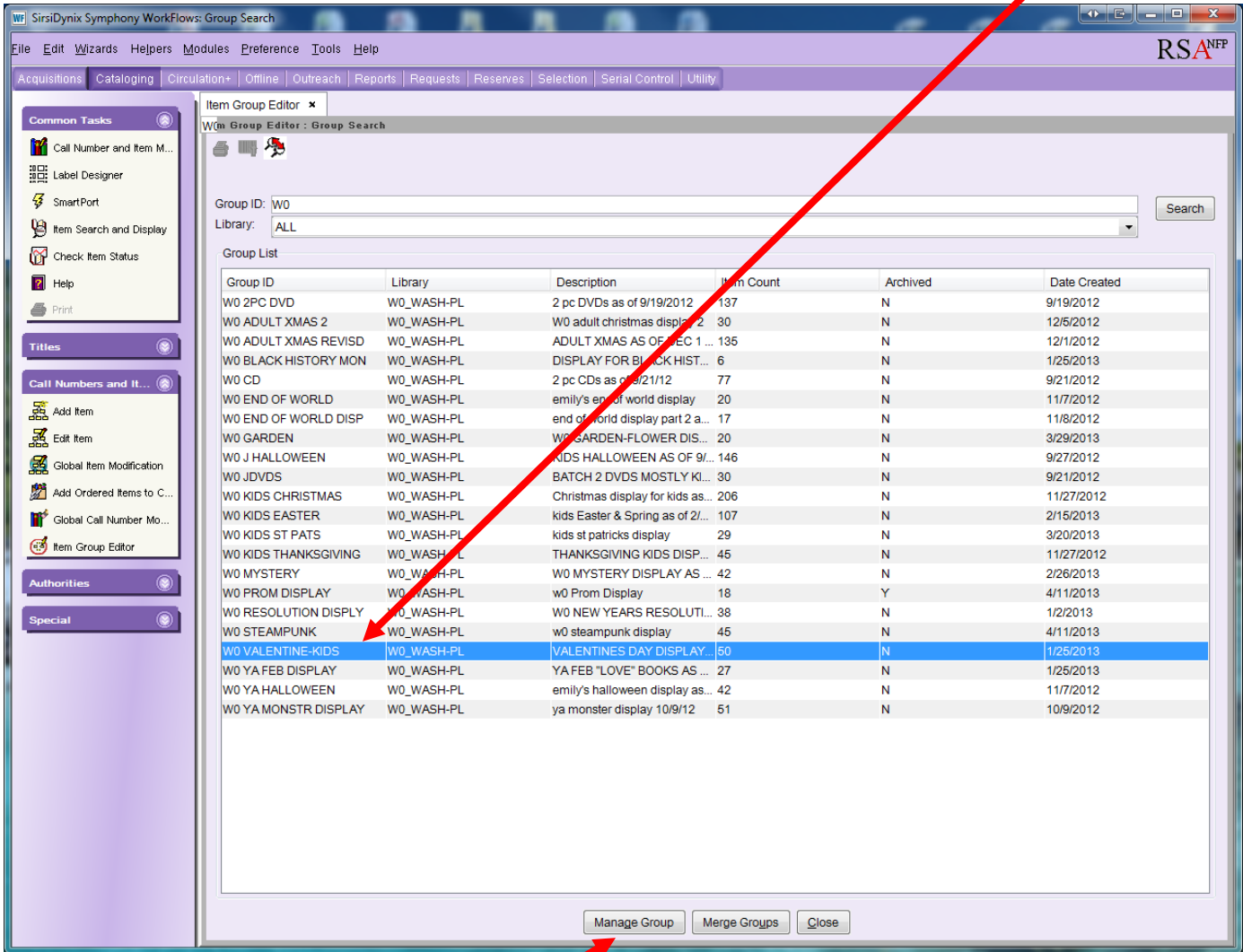
The screenshot shows the 'Item Search' window in SirsiDynix Symphony WorkFlows. The window title is 'SirsiDynix Symphony WorkFlows: Item Search'. The menu bar includes 'File', 'Edit', 'Wizards', 'Helpers', 'Modules', 'Preference', 'Tools', and 'Help'. The toolbar includes 'Acquisitions', 'Cataloging', 'Circulation+', 'Offline', 'Outreach', 'Reports', 'Requests', 'Reserves', 'Selection', 'Serial Control', and 'Utility'. The 'Call Numbers and Items' toolbar on the left contains 'Common Tasks' (Call Number and Item..., Label Designer, SmartPort, Item Search and Display, Check Item Status, Help, Print), 'Titles', and 'Call Numbers and Items' (Add Item, Edit Item, Global Item Modification, Add Ordered Items to..., Global Call Number Mo..., Item Group Editor). The 'Item Group Editor' button is highlighted with a red arrow. The search form includes fields for Library, Home location, Price, Date created, Date inventoried, Media desk, Item type, Item category 1, Item category 2, Current location, Last activity date, and Extended info. There are also radio buttons for Permanent (Yes, No, Both) and Shadowed (Yes, No, Both), and a dropdown for Reserve status. The search form has 'Search' and 'Clear' buttons, and radio buttons for 'Single' and 'Advanced'. Below the search form are two empty tables with the following columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. The bottom of the window has buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'.

The Group Search screen opens:



6. 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:



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

The item group editor will display the group:

Item Group Editor

Group Info

Group ID: W0 VALENTINE-KIDS Date created: 1/25/2013 Created by: W0\_TECH Library: W0\_WASH-PL  
 Description: VALENTINES DAY DISPLAY-KIDS A Date last modified: 2/15/2013 Last modified by: W0\_TECH

Item List: 50 records

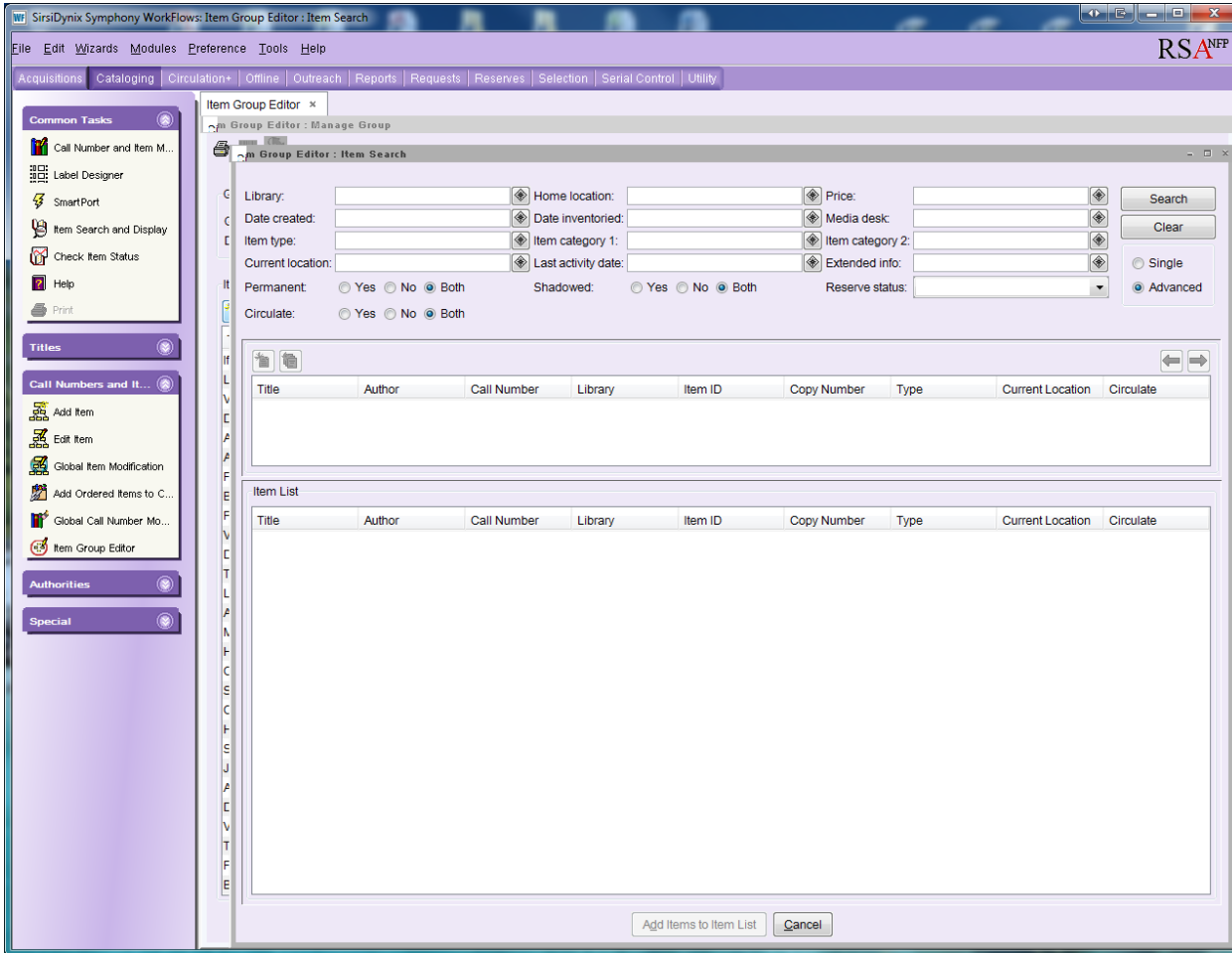
Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
If you'll love my Val...	Rylant, Cynthia	E RYL	W0_WASH-PL	A66701096534	1	BOOK-J	EASY	Y
Love, Ruby Valen...	Friedman, Laurie...	E FRI	W0_WASH-PL	A66701245793	1	BOOK-J	EASY	Y
Valentine's day...	Trueit, Trudi Strain	E TRU	W0_WASH-PL	A66701627555	1	BOOK-J	EASY	Y
Dragon : Happy v...	Reyes, Gabrielle	E REY	W0_WASH-PL	A66701588751	1	BOOK-J	EASY	Y
A giant crush	Holdenko, Genni...	E CHO	W0_WASH-PL	A66701667092	1	BOOK-J	EASY	Y
A very scary Vale...	Balaban, Mariah...	E BAL	W0_WASH-PL	A66701588769	1	BOOK-J	CHECKEDOUT	N
Franklin's valentin...	Bourgeois, Paulet...	E BOU	W0_WASH-PL	A66700841384	1	BOOK-J	EASY	Y
Be my valentine!	Bryant, Megan E.	E BRY	W0_WASH-PL	A66701254661	1	BOOK-J	CHECKEDOUT	N
Pooch's Valentine	Gaines, Isabel	E GAI	W0_WASH-PL	A66701173069	1	BOOK-J	CHECKEDOUT	N
Valentine's Day d...	Herman, Gail	E HER	W0_WASH-PL	A66700898640	1	BOOK-J	EASY	Y
Don't be my valen...	Lexau, Joan M.	E LEX	W0_WASH-PL	A66700664102	1	BOOK-J	MISSING	N
Too many valenti...	McNamara, Marg...	E MCN	W0_WASH-PL	A66700972868	1	BOOK-J	EASY	Y
Little Bear's valent...	Minarik, Elise Hol...	E MIN	W0_WASH-PL	A66700971749	1	BOOK-J	EASY	Y
Amelia Bedelia's f...	Parish, Herman	E PAR	W0_WASH-PL	A66701485602	1	BOOK-J	CHECKEDOUT	N
My honey Valentine	Parent, Nancy	E PAR	W0_WASH-PL	A66700700944	1	BOOK-J	CHECKEDOUT	N
Happy Valentine's...	Samuels, Barbara	E SAM	W0_WASH-PL	A66701170760	1	BOOK-J	EASY	Y
Care Bears : love ...	Sander, Sonia	E SAN	W0_WASH-PL	A66701404698	1	BOOK-J	EASY	Y
Somebody loves ...	Spinelli, Eileen	E SPI	W0_WASH-PL	A66700321392	1	BOOK-J	EASY	Y
Cam Jansen and ...	Adler, David A	J ADL	W0_WASH-PL	A66701170891	1	BOOK-J	CHECKEDOUT	N
Hearts, cupids, an...	Barth, Edna	J 394.2 BAR	W0_WASH-PL	A66700162714	1	BOOK-J	J-NONFIC	Y
St. Valentine	Sabuda, Robert	J 270.1092 SAB	W0_WASH-PL	A66700305053	1	BOOK-J	J-NONFIC	Y
Junie B. Jones an...	Park, Barbara	J PAR	W0_WASH-PL	A66700748887	1	BOOK-J	J-FICTION	Y
A spy among the ...	Naylor, Phyllis Re...	J NAY	W0_WASH-PL	A66700809633	1	BOOK-J	CHECKEDOUT	N
Danny's mystery v...	Kunhardt, Edith	BOOK/CASS E K...	W0_WASH-PL	A66700481003	1	BOOK-CAS-J	J-AUDIOBK	Y
Valentine's Day : t...	Supraner, Robyn	J 745.5941 SUP	W0_WASH-PL	A66700192426	1	BOOK-J	J-NONFIC	Y
Things to make a...	DePaola, Tomie, ...	J 745.59 DEP	W0_WASH-PL	A66700192272	1	BOOK-J	J-NONFIC	Y
Froggy's first kiss	London, Jonathan...	E LON	W0_WASH-PL	A66700685958	1	BOOK-J	EASY	Y
Be my valentine	Wells, Rosemary	E WEL	W0_WASH-PL	A66700680771	1	BOOK-J	EASY	Y

Buttons: Create Group, Save Group, Remove Group, Edit Item, Restore Items (t), New Search (g), Close

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

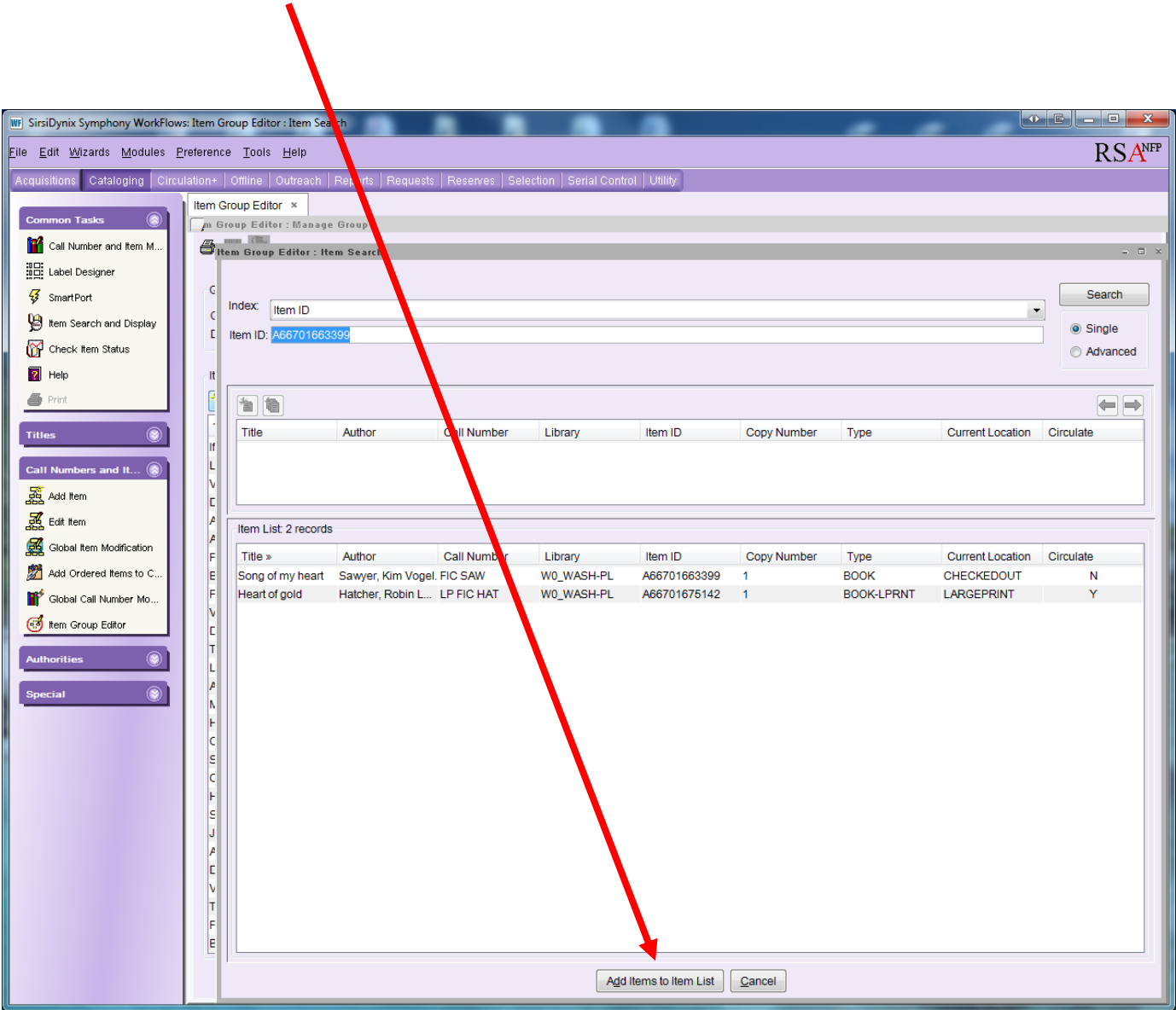


The Item Search box will open:



9. Using the single or advanced search, find the items you want to add to the group.

10. Click the “Add Items to Item List” button when you are finished searching for items to add to the group:



11. 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.

Group Info

Group ID: W0 VALENTINE-KIDS Date created: 1/25/2013 Created by: W0\_TECH Library: W0\_WASH-PL  
 Description: VALENTINES DAY DISPLAY-KIDS A Date last modified: 2/15/2013 Last modified by: W0\_TECH

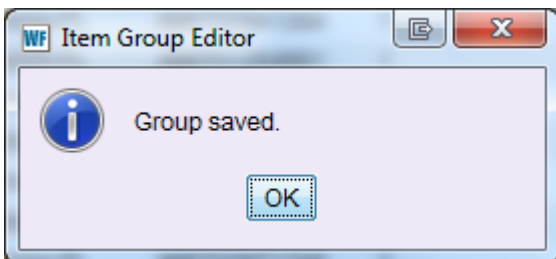
Item List: 52 records

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Valentine's Day : L...	Supraner, Robyn.	J 745.5941 SUP	W0_WASH-PL	A66700192426	1	BOOK-J	J-NONFIC	Y
Things to make a...	DePaola, Tomie...	J 745.59 DEP	W0_WASH-PL	A66700192272	1	BOOK-J	J-NONFIC	Y
Froggy's first kiss	London, Jonathan...	E LON	W0_WASH-PL	A66700685958	1	BOOK-J	EASY	Y
Be my valentine	Wells, Rosemary.	E WEL	W0_WASH-PL	A66700898771	1	BOOK-J	EASY	Y
Valentine's Day	Rau, Dana Meach...	J 394.2618 RAU	W0_WASH-PL	A66700883302	1	BOOK-J	J-NONFIC	Y
Valentine's day cr...	Eribach, Arlene.	J 745.594 ERL	W0_WASH-PL	A66701023002	1	BOOK-J	J-NONFIC	Y
Holiday parties	Streb, Judith.	J 793.21 STR	W0_WASH-PL	A66700307584	1	BOOK-J	J-NONFIC	Y
Rhyme time vale...	Poydar, Nancy.	E POY	W0_WASH-PL	A66700962774	1	BOOK-J	EASY	Y
Valentine friends	Schweninger, Ann.	E SCH	W0_WASH-PL	A66700510187	1	BOOK-J	EASY	Y
Nate the Great an...	Sharnat, Marjorie...	E SHA	W0_WASH-PL	A66700841326	1	BOOK-J	EASY	Y
A village full of val...	Stevenson, Jame...	E STE	W0_WASH-PL	A66700483843	1	BOOK-J	EASY	Y
The great Valenti...	Adams, Adrienne.	E ADA	W0_WASH-PL	A66700244728	1	BOOK-J	EASY	Y
Jennifer Jones wo...	Wishinsky, Frieda.	E WIS	W0_WASH-PL	A66700971587	1	BOOK-J	EASY	Y
Minnie and Moo : ...	Cazet, Denys.	E CAZ	W0_WASH-PL	A66700948576	1	BOOK-J	CHECKEDOUT	N
Full, full, full of love	Cooke, Trish.	E COO	W0_WASH-PL	A66700971626	1	BOOK-J	EASY	Y
Happy Valentine's...	Grambling, Lois G.	E GRA	W0_WASH-PL	A66700673359	1	BOOK-J	EASY	Y
Just for you	Mayer, Mercer, 19...	E MAY	W0_WASH-PL	A66700698862	1	BOOK-J	EASY	Y
Fluffy's Valentine...	McMullan, Kate.	E MCM	W0_WASH-PL	A66701142953	1	BOOK-J	CHECKEDOUT	N
One zillion valenti...	Modell, Frank.	E MOD	W0_WASH-PL	A66700294309	1	BOOK-J	EASY	Y
The great boyfrien...	Suzanne, Jamie.	J SUZ	W0_WASH-PL	A66700629627	1	BOOK-PBK-J	J-FICTION	Y
The boyfriend ga...	Suzanne, Jamie.	J SUZ	W0_WASH-PL	A66700665924	1	BOOK-PBK-J	J-FICTION	Y
Cody's secret ad...	Duffey, Betsy.	J DUF	W0_WASH-PL	A66700651349	1	BOOK-J	J-FICTION	Y
Nelson in love : a...	Smith, Janice Lee...	J SMI	W0_WASH-PL	A66700255826	1	BOOK-J	J-FICTION	Y
Four stupid cupids	Maguire, Gregory.	J MAG	W0_WASH-PL	A66700808899	1	BOOK-J	J-FICTION	Y
Horrible Harry an...	Kline, Suzy.	J KLI	W0_WASH-PL	A66700065611	1	BOOK-J	J-FICTION	Y
Valentine's Day...	Greenwald, Chels...	L GFE	W0_WASH-PL	A66700246540	1	BOOK-J	J-FICTION	Y
Song of my heart	Sawyer, Kim Vogel.	FIC SAW	W0_WASH-PL	A66701663399	1	BOOK	CHECKEDOUT	N
Heart of gold	Hatcher, Robin Le...	LP FIC HAT	W0_WASH-PL	A66701675142	1	BOOK-LPRNT	LARGEPRINT	Y

Buttons: Create Group, Save Group, Remove Group, Edit Items, Restore Items (t), New Search (d), Close

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

13. 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.

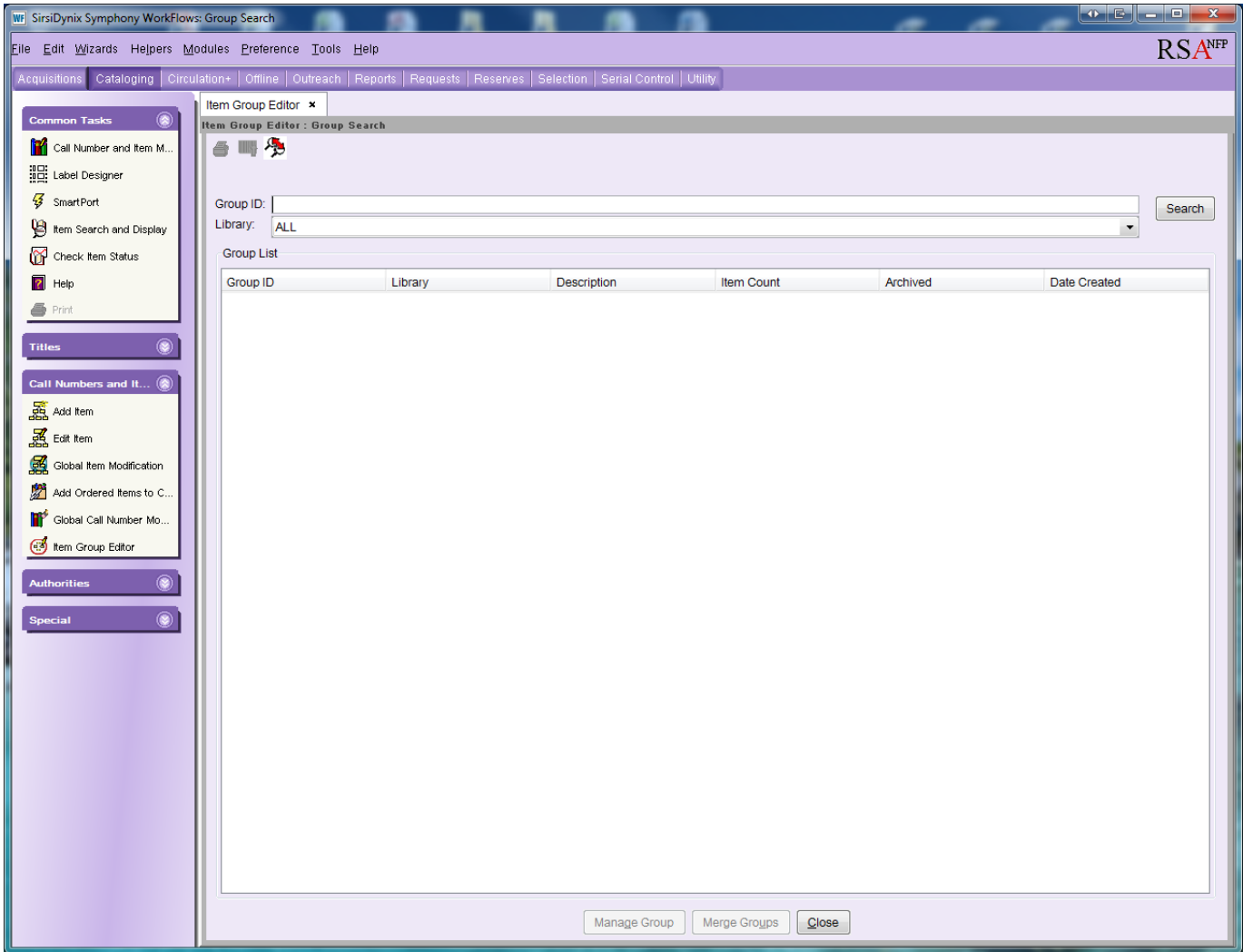
1. Log into WorkFlows using your individual cataloging account.
2. Go to the Cataloging module.
3. Open the Call Numbers and Items toolbar on the left.
4. Put your cursor over the Item Group Editor wizard and *left* click.
5. The advanced search screen opens. Click the Item/Group Search helper button:



The screenshot shows the 'Item Search' window with the following components:

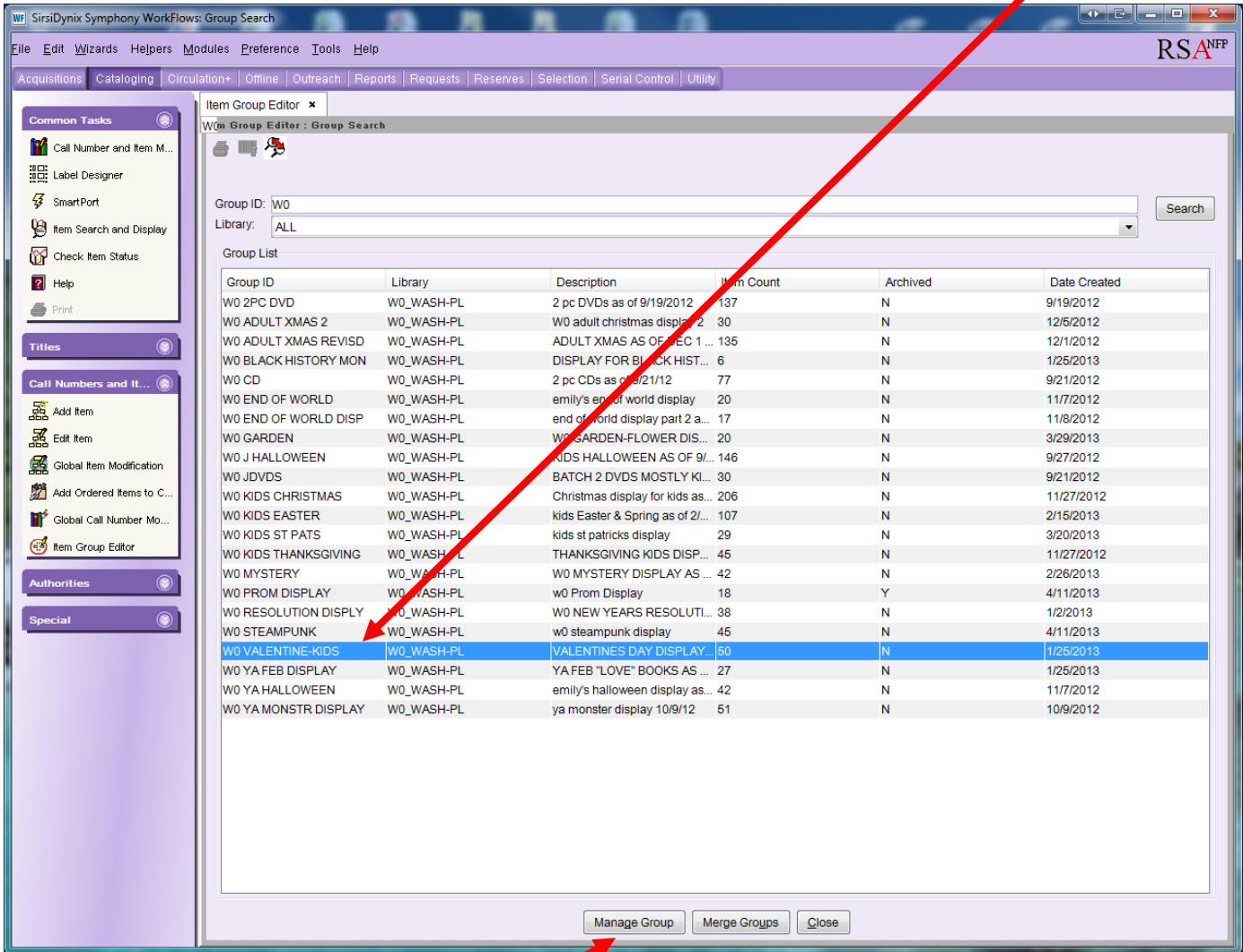
- Common Tasks:** Call Number and Item..., Label Designer, SmartPort, Item Search and Display, Check Item Status, Help, Print.
- Titles:** Add Item, Edit Item, Global Item Modification, Add Ordered Items to..., Global Call Number Mo..., Item Group Editor.
- Authorities:** (empty)
- Special:** (empty)
- Item Group Editor:** A toolbar with icons for 'Item Group Editor' (the red horse icon), 'Item Search', and 'Advanced Search'.
- Search Fields:**
  - Library: [text box]
  - Home location: [text box]
  - Price: [text box]
  - Date created: [text box]
  - Date inventoried: [text box]
  - Media desk: [text box]
  - Item type: [text box]
  - Item category 1: [text box]
  - Item category 2: [text box]
  - Current location: [text box]
  - Last activity date: [text box]
  - Extended info: [text box]
  - Permanent:  Yes  No  Both
  - Shadowed:  Yes  No  Both
  - Reserve status: [dropdown menu]
  - Search: [button]
  - Clear: [button]
  - Single:
  - Advanced:
- Item List:** A table with columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, Circulate.
- Item List:** A table with columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, Circulate.
- Buttons:** Create Group, Edit Items, Remove Items, Clear Item List, Close.

The Group Search screen opens:



6. 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:



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

- 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:

Item Group Editor

Group Info

Group ID: WO VALENTINE-KIDS Date created: 1/25/2013 Created by: WO\_TECH Library: WO\_WASH-PL  
 Description: VALENTINES DAY DISPLAY-KIDS A Date last modified: 5/28/2013 Last modified by: WO\_TECH

Item List: 52 records

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Valentine's Day...	L. Supraner, Robyn.	J 745.5941 SUP	WO_WASH-PL	A66700192426	1	BOOK-J	J-NONFIC	Y
Things to make a...	DePaola, Tomie, ...	J 745.59 DEP	WO_WASH-PL	A66700192272	1	BOOK-J	J-NONFIC	Y
Froggy's first kiss	London, Jonathan...	E LON	WO_WASH-PL	A66700685958	1	BOOK-J	EASY	Y
Be my valentine	Wells, Rosemary.	E WEL	WO_WASH-PL	A66700898771	1	BOOK-J	EASY	Y
Valentine's Day	Rau, Dana Meach...	J 394.2618 RAU	WO_WASH-PL	A66700883302	1	BOOK-J	J-NONFIC	Y
Valentine's day cr...	Erlbach, Arlene.	J 745.594 ERL	WO_WASH-PL	A66701023002	1	BOOK-J	J-NONFIC	Y
Holiday parties	Streb, Judith.	J 793.21 STR	WO_WASH-PL	A66700307584	1	BOOK-J	J-NONFIC	Y
Rhyme time vale...	Poydar, Nancy.	E POY	WO_WASH-PL	A66700962774	1	BOOK-J	EASY	Y
Valentine friends	Schweninger, Ann...	E SCH	WO_WASH-PL	A66700510187	1	BOOK-J	EASY	Y
Nate the Great an...	Sharmat, Marjorie...	E SHA	WO_WASH-PL	A66700841326	1	BOOK-J	EASY	Y
A village full of val...	Stevenson, Jame...	E STE	WO_WASH-PL	A66700483843	1	BOOK-J	EASY	Y
The great Valent...	Adams, Adrienne.	E ADA	WO_WASH-PL	A66700244728	1	BOOK-J	EASY	Y
Jennifer Jones wo...	Wishinsky, Frieda.	E WIS	WO_WASH-PL	A66700971587	1	BOOK-J	EASY	Y
Minnie and Moo :...	Cazet, Denys.	E CAZ	WO_WASH-PL	A66700948576	1	BOOK-J	CHECKEDOUT	N
Full, full, full of love	Cooke, Trish.	E COO	WO_WASH-PL	A66700971626	1	BOOK-J	EASY	Y
Happy Valentine's...	Grambling, Lois G.	E GRA	WO_WASH-PL	A66700673359	1	BOOK-J	EASY	Y
Just for you	Mayer, Mercer, 19...	E MAY	WO_WASH-PL	A66700698862	1	BOOK-J	EASY	Y
Fluffy's Valentine...	McMullan, Kate.	E MCM	WO_WASH-PL	A66701142953	1	BOOK-J	CHECKEDOUT	N
One zillion valenti...	Modell, Frank.	E MOD	WO_WASH-PL	A66700294309	1	BOOK-J	EASY	Y
The great boyfrien...	Suzanne, Jamie.	J SUZ	WO_WASH-PL	A66700629627	1	BOOK-PBK-J	J-FICTION	Y
The boyfriend ga...	Suzanne, Jamie.	J SUZ	WO_WASH-PL	A66700665924	1	BOOK-PBK-J	J-FICTION	Y
Cody's secret ad...	Duffey, Betsy.	J DUF	WO_WASH-PL	A66700651349	1	BOOK-J	J-FICTION	Y
Nelson in love : a...	Smith, Janice Lee...	J SMI	WO_WASH-PL	A66700655826	1	BOOK-J	J-FICTION	Y
Four stupid cupids	Maguire, Gregory.	J MAG	WO_WASH-PL	A667008000999	1	BOOK-J	J-FICTION	Y
Horrible Harry an...	Kline, Suzy.	J KLI	WO_WASH-PL	A66700066561	1	BOOK-J	J-FICTION	Y
Valentine Rosy	Greenwald, Sheila.	J GRE	WO_WASH-PL	A66700246542	1	BOOK-J	J-FICTION	Y
Song of my heart	Sawyer, Kim Vogel.	FIC SAW	WO_WASH-PL	A66701663399	1	BOOK	CHECKEDOUT	N
Heart of gold	Hatcher, Robin Le...	LP FIC HAT	WO_WASH-PL	A66701675142	1	BOOK-LPRNT	LARGEPRINT	Y

Create Group Save Group Remove Group Edit Items Restore Items (t) New Search (d) Close

- Click the Remove Items helper button in the upper left corner:



10. 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.

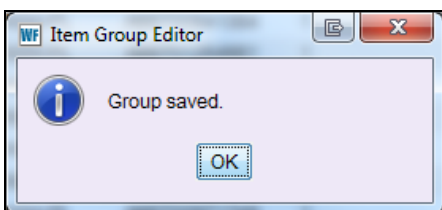
Item List: 51 records

The screenshot shows the 'Item Group Editor' window. The 'Group Info' section displays: Group ID: W0 VALENTINE-KIDS, Description: VALENTINES DAY DISPLAY-KIDS A, Date created: 1/25/2013, Created by: W0\_TECH, Library: W0\_WASH-PL, Date last modified: 5/28/2013, Last modified by: W0\_TECH. Below this is the 'Item List: 51 records' table with columns: Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. The table contains 20 rows of book records. At the bottom of the window, the 'Save Group' button is highlighted with a red arrow.

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Danny's mystery v...	Kunhardt, Edith.	BOOK/CASS E K...	W0_WASH-PL	A66700481003	1	BOOK-CAS-J	J-AUDIOBK	Y
Valentine's Day : L...	Supraner, Robyn.	J 745.5941 SUP	W0_WASH-PL	A66700192426	1	BOOK-J	J-NONFIC	Y
Things to make a...	DePaola, Tomie, ...	J 745.59 DEP	W0_WASH-PL	A66700192272	1	BOOK-J	J-NONFIC	Y
Froggy's first kiss	London, Jonathan...	E LON	W0_WASH-PL	A66700685958	1	BOOK-J	EASY	Y
Be my valentine	Wells, Rosemary.	E WEL	W0_WASH-PL	A66700898771	1	BOOK-J	EASY	Y
Valentine's Day	Rau, Dana Meach...	J 394.2618 RAU	W0_WASH-PL	A66700883302	1	BOOK-J	J-NONFIC	Y
Valentine's day cr...	Erlbach, Arlene.	J 745.594 ERL	W0_WASH-PL	A66701023002	1	BOOK-J	J-NONFIC	Y
Holiday parties	Streb, Judith.	J 793.21 STR	W0_WASH-PL	A66700307584	1	BOOK-J	J-NONFIC	Y
Rhyme time vale...	Poydar, Nancy.	E POY	W0_WASH-PL	A66700962774	1	BOOK-J	EASY	Y
Valentine friends	Schweninger, Ann.	E SCH	W0_WASH-PL	A66700510187	1	BOOK-J	EASY	Y
Nate the Great an...	Sharmat, Marjorie.	E SHA	W0_WASH-PL	A66700841326	1	BOOK-J	EASY	Y
A village full of val...	Stevenson, Jame...	E STE	W0_WASH-PL	A66700483843	1	BOOK-J	EASY	Y
The great Valent...	Adams, Adrienne.	E ADA	W0_WASH-PL	A66700244728	1	BOOK-J	EASY	Y
Jennifer Jones wo...	Wishinsky, Frieda.	E WIS	W0_WASH-PL	A66700971587	1	BOOK-J	EASY	Y
Minnie and Moo : ...	Cazet, Denys.	E CAZ	W0_WASH-PL	A66700948576	1	BOOK-J	CHECKEDOUT	N
Full, full, full of love	Cooke, Trish.	E COO	W0_WASH-PL	A66700971626	1	BOOK-J	EASY	Y
Happy Valentine's...	Grambling, Lois G.	E GRA	W0_WASH-PL	A66700673359	1	BOOK-J	EASY	Y
Just for you	Mayer, Mercer, 19.	E MAY	W0_WASH-PL	A66700698862	1	BOOK-J	EASY	Y
Fluffy's Valentine'...	McMullan, Kate.	E MCM	W0_WASH-PL	A66701142953	1	BOOK-J	CHECKEDOUT	N
One zillion valenti...	Modell, Frank.	E MOD	W0_WASH-PL	A66700294309	1	BOOK-J	EASY	Y
The great boyfrien...	Suzanne, Jamie.	J SUZ	W0_WASH-PL	A66700629627	1	BOOK-PBK-J	J-FICTION	Y
The boyfriend ga...	Suzanne, Jamie.	J SUZ	W0_WASH-PL	A66700665924	1	BOOK-PBK-J	J-FICTION	Y
Cody's secret ad...	Duffey, Betsy.	J DUF	W0_WASH-PL	A667006651349	1	BOOK-J	J-FICTION	Y
Nelson in love : a...	Smith, Janice Lee...	J SMI	W0_WASH-PL	A66700255826	1	BOOK-J	J-FICTION	Y
Four stupid cupids	Maguire, Gregory.	J MAG	W0_WASH-PL	A66700808899	1	BOOK-J	J-FICTION	Y
Horrible Harry an...	Kline, Suzy.	J KLI	W0_WASH-PL	A66700065611	1	BOOK-J	J-FICTION	Y
Valentine Rosy	Greenwald, Sheila.	J GRE	W0_WASH-PL	A66700246542	1	BOOK-J	J-FICTION	Y
Heart of gold	Hatcher, Robin Le...	LP FIC HAT	W0_WASH-PL	A66701675142	1	BOOK-LPRNT	LARGEPRINT	Y

11. Click the “Save Group” button to save the group with the items removed from it.

12. 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.
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 item group editor's advanced search screen opens. Click the Item/Group Search helper button:



Common Tasks

- Call Number and Item ...
- Label Designer
- SmartPort
- Item Search and Display
- Check Item Status
- Help
- Print

Titles

Call Numbers and I...

- Add Item
- Edit Item
- Global Item Modification
- Add Ordered Items to ...
- Global Call Number Mo...
- Item Group Editor

Authorities

Special

Library: [ ] Home location: [ ] Price: [ ] Search

Date created: [ ] Date inventoried: [ ] Media desk: [ ] Clear

Item type: [ ] Item category 1: [ ] Item category 2: [ ]

Current location: [ ] Last activity date: [ ] Extended info: [ ]

Permanent:  Yes  No  Both Shadowed:  Yes  No  Both Reserve status: [ ]

Circulate:  Yes  No  Both

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
-------	--------	-------------	---------	---------	-------------	------	------------------	-----------

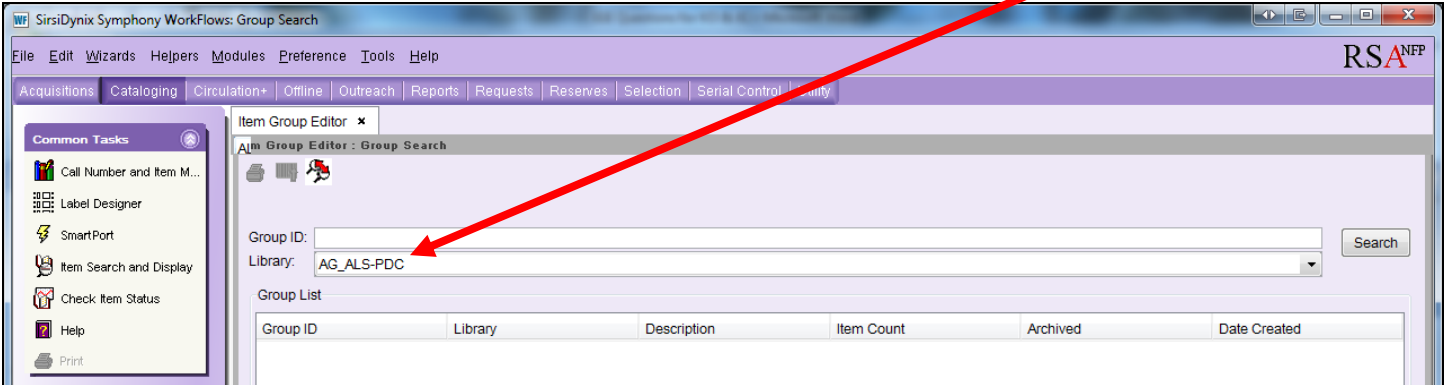
Item List

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
-------	--------	-------------	---------	---------	-------------	------	------------------	-----------

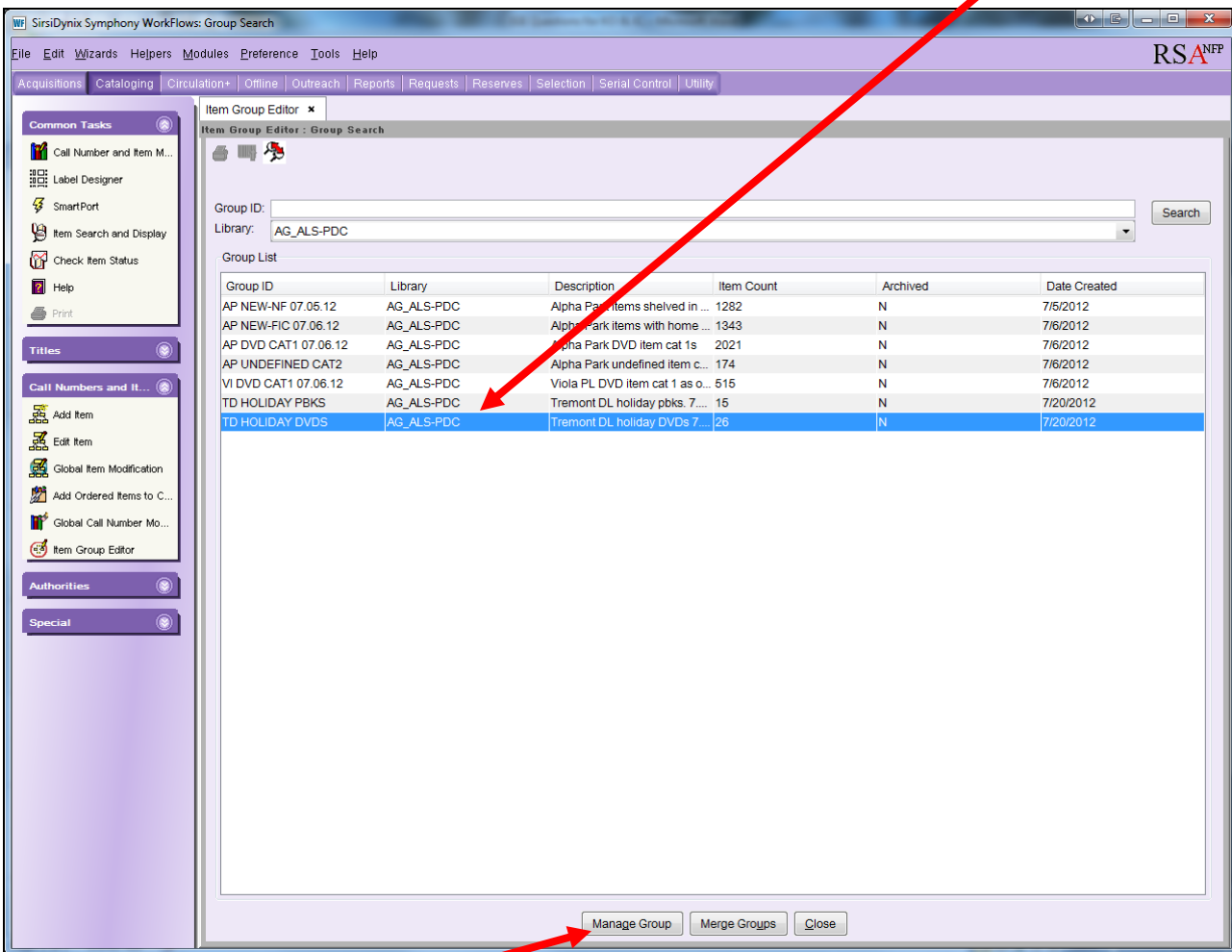
Create Group Edit Items Remove Items Clear Item List Close

6. 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:



7. From the group list, click on the group you want to edit so that the group appears in blue:



8. 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:

Item Group Editor

Group Editor: Manage Group

Group Info

Group ID:  Date created: 7/20/2012 Created by: TECH Library: AG\_ALS-PDC  
 Description:  Date last modified: 7/20/2012 Last modified by: TECH

Item List: 26 records

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Mrs. Miracle [vide...	Sony Pictures Ho...	VID/DVD NR HOL	TD_TREMONT	A36580630285	1	DVD	CHECKEDOUT	N
Four Christmases ...	Spyglass Entertai...	VID/DVD PG-13	TD_TREMONT	A36580602931	1	DVD	HOLIDAY	Y
Where God left his...	IFC Films.	VID/DVD NR HOL	TD_TREMONT	A36580601676	1	DVD	HOLIDAY	Y
Nothing like the h...	Overture Films.	VID/DVD PG-13 H...	TD_TREMONT	A36580600311	1	DVD	HOLIDAY	Y
The most wonderf...	ITV Global Enterta...	VID/DVD NR HOL	TD_TREMONT	A36580599421	1	DVD	CHECKEDOUT	N
An old-fashioned ...	RHI Entertainment...	VID/DVD NR HOL	TD_TREMONT	A36580599405	1	DVD	HOLIDAY	Y
The Christmas ch...	Muse Entertainme...	VID/DVD NR HOL	TD_TREMONT	A36580599463	1	DVD	CHECKEDOUT	N
Fred Claus [videor...	Warner Bros. Pictu...	VID/DVD PG HOL	TD_TREMONT	A36580576180	1	DVD	CHECKEDOUT	N
Christmas cottage...	Birch Grove Films ...	VID/DVD PG HOL	TD_TREMONT	A36580590118	1	DVD	CHECKEDOUT	N
This Christmas [vi...	Screen Gems (19...	VID/DVD PG-13 H...	TD_TREMONT	A36580575590	1	DVD	HOLIDAY	Y
The perfect holid...	Destination Films.	VID/DVD PG HOL	TD_TREMONT	A36580575346	1	DVD	HOLIDAY	Y
Deck the halls [vid...	Regency Enterpris...	VID/DVD BKRM	TD_TREMONT	A36580547741	1	DVD	HOLIDAY	Y
Irving Berlin's Whit...	Paramount Pictur...	VID/DVD NR HOL	TD_TREMONT	A36580113908	1	DVD	AVAILABLE	N
A Christmas too m...	Damn Good Enter...	VID/DVD PG-13 B...	TD_TREMONT	A36580549094	1	DVD	HOLIDAY	Y
Truman Capote's ...	RHI Entertainment...	VID/DVD NR JUV ...	TD_TREMONT	A36580603319	1	DVD	HOLIDAY	Y
Christmas in the cl...	Hannover House (...	VID/DVD HOL BK...	TD_TREMONT	A36580519942	1	DVD	HOLIDAY	Y
The Christmas sh...	FremantleMedia	VID/DVD NR HOLI...	TD_TREMONT	A36580518132	1	DVD	AVAILABLE	N
Frank Capra's Its ...	Paramount Pictur...	VID/DVD NR HOL	TD_TREMONT	A36580110170	1	DVD	CHECKEDOUT	N
A Christmas story ...	Metro-Goldwyn-M...	VID/DVD PG HOL	TD_TREMONT	A36580241117	1	DVD	CHECKEDOUT	N
A boyfriend for Ch...		VID/DVD NR BKRM	TD_TREMONT	A36580497645	1	DVD	HOLIDAY	Y
The 12 dogs of Ch...	Screen Media Fil...	VID/DVD BKRM	TD_TREMONT	A36580534447	1	DVD	CHECKEDOUT	N
Christmas with the...	Sony Pictures Ho...	VID/DVD PG HOL	TD_TREMONT	A36580488523	1	DVD	CHECKEDOUT	N
The Nutcracker [vi...	Kultur Video.	VID/DVD NR HOL	TD_TREMONT	A36580603301	1	DVD	HOLIDAY	Y
Christmas child [vi...	GoodTimes Enter...	VID/DVD NR BKRM	TD_TREMONT	A36580518085	1	DVD	CHECKEDOUT	N
National Lampoo...	Hughes Entertain...	VID/DVD BKRM	TD_TREMONT	A36580548357	1	DVD	HOLIDAY	Y
The Christmas bo...	Bonneville Produc...	VID/DVD G BKRM	TD_TREMONT	A36580518386	1	DVD	HOLIDAY	Y

Create Group Save Group Remove Group Edit Items Restore Items (r) New Search (d) Close

9. Click the Edit Items button at the bottom.

The Edit Items box will open:

Wm Group Editor : Edit Items

Archive before editing

Item information

Item ID: Copy number: Will not be modified

Type: Will not be modified Item library: Will not be modified

Home location: Will not be modified Current location:

Item cat1: Will not be modified Item cat2: Will not be modified

Media desk: Will not be modified Number of pieces: Will not be modified

Permanent: Will not be modified Price: Will not be modified

Shadow item: Will not be modified Circulate: Will not be modified

Extended information

New  Append  Replace CIRCNOTE:

New  Append  Replace PUBLIC:

Title	Call Number	Library	Item ID	Status

Edit Items Reset (b) Close

10. **Important:** To save the current values for all of the items before you perform the edits, check the box next to “Archive before editing.”

Wm Group Editor : Edit Items

Archive before editing

Item information

Item ID: Copy number: Will not be modified

Type: Will not be modified Item library: Will not be modified

Home location: Will not be modified Current location:

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.

11. 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:**

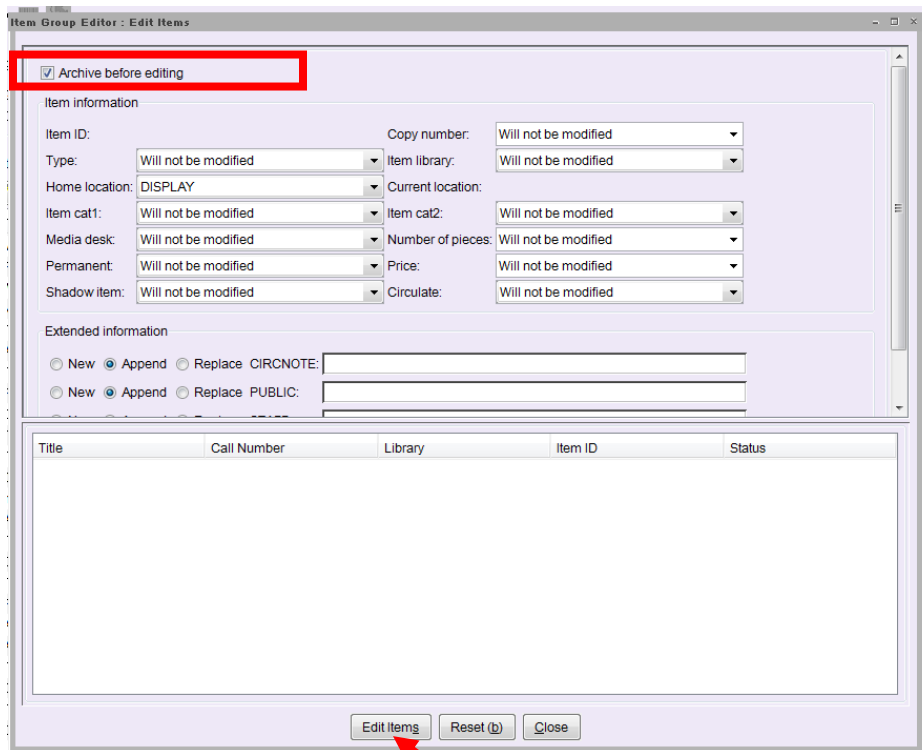
The item information values you select and the extended information text you enter in the Edit Items box will be applied to *all* of the items in the group.

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).



12. 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:

Title »	Call Number	Library	Item ID	Status
Mrs. Miracle [videorecording]	VID/DVD NR HOL	TD_TREMONT	A36580630285	Modified
Four Christmases [videore...	VID/DVD PG-13	TD_TREMONT	A36580602931	Modified
Where God left his shoes [v...	VID/DVD NR HOL	TD_TREMONT	A36580601676	Modified
Nothing like the holidays [vi...	VID/DVD PG-13 HOL	TD_TREMONT	A36580600311	Modified
The most wonderful time of...	VID/DVD NR HOL	TD_TREMONT	A36580599421	Modified
An old-fashioned Thanksgi...	VID/DVD NR HOL	TD_TREMONT	A36580599405	Modified
The Christmas choir [video...	VID/DVD NR HOL	TD_TREMONT	A36580599463	Modified
Fred Claus [videorecording]	VID/DVD PG HOL	TD_TREMONT	A36580576180	Modified
Christmas cottage [videore...	VID/DVD PG HOL	TD_TREMONT	A36580590118	Modified
This Christmas [videorecor...	VID/DVD PG-13 HOL	TD_TREMONT	A36580575590	Modified
The perfect holiday [videor...	VID/DVD PG HOL	TD_TREMONT	A36580575346	Modified

13. 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.”

Item Group Editor : Edit Items

Archive before editing

Item information

Item ID: Copy number: Will not be modified

Type: Will not be modified Item library: Will not be modified

Home location: DISPLAY Current location:

Item cat1: Will not be modified Item cat2: Will not be modified

Media desk: Will not be modified Number of pieces: Will not be modified

Permanent: Will not be modified Price: Will not be modified

Shadow item: Will not be modified Circulate: Will not be modified

Extended information

New  Append  Replace CIRCNOTE:

New  Append  Replace PUBLIC:

Title »	Call Number	Library	Item ID	Status
Mrs. Miracle [videorecording]	VID/DVD NR HOL	TD_TREMONT	A36580630285	Modified
Four Christmases [videore...	VID/DVD PG-13	TD_TREMONT	A36580602931	Modified
Where God left his shoes [v...	VID/DVD NR HOL	TD_TREMONT	A36580601676	Modified
Nothing like the holidays [vi...	VID/DVD PG-13 HOL	TD_TREMONT	A36580600311	Modified
The most wonderful time of...	VID/DVD NR HOL	TD_TREMONT	A36580599421	Modified
An old-fashioned Thanksgi...	VID/DVD NR HOL	TD_TREMONT	A36580599405	Modified
The Christmas choir [video...	VID/DVD NR HOL	TD_TREMONT	A36580599463	Modified
Fred Claus [videorecording]	VID/DVD PG HOL	TD_TREMONT	A36580576180	Modified
Christmas cottage [videore...	VID/DVD PG HOL	TD_TREMONT	A36580590118	Modified
This Christmas [videorecor...	VID/DVD PG-13 HOL	TD_TREMONT	A36580575590	Modified
The perfect holiday [videor...	VID/DVD PG HOL	TD_TREMONT	A36580575346	Modified

Edit Items Reset (b) Close

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

Click the Item/Group Search helper button:

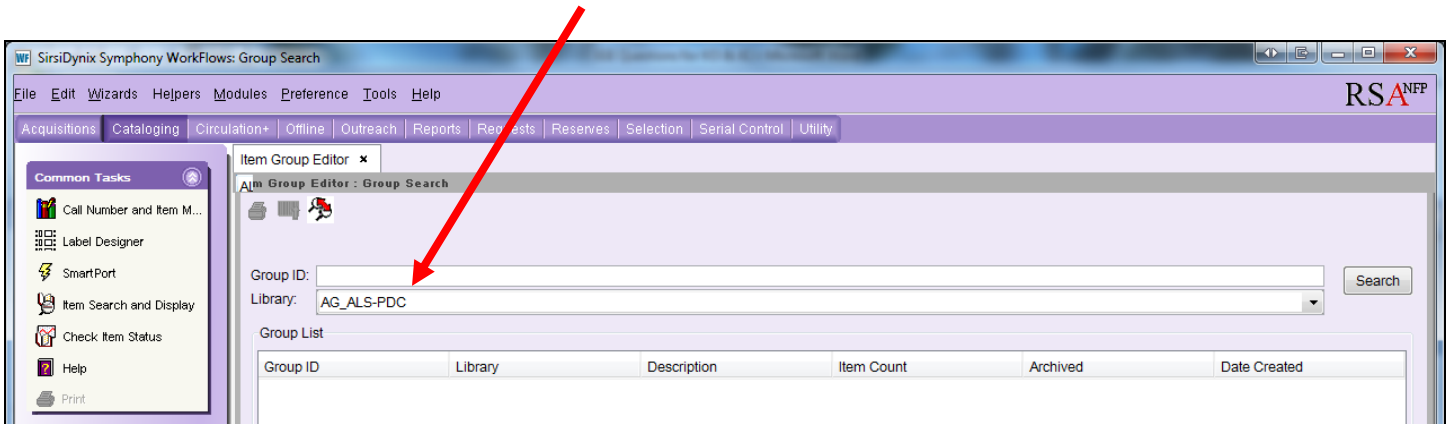


A screenshot of the SirsiDynix Symphony Workflows: Item Search application. The window title is "SirsiDynix Symphony Workflows: Item Search". The menu bar includes "File", "Edit", " Wizards", "Helpers", "Modules", "Preference", "Tools", and "Help". The top navigation bar contains "Acquisitions", "Cataloging", "Circulation+", "Offline", "Outreach", "Reports", "Requests", "Reserves", "Selection", "Serial Control", and "Utility". The main interface is divided into several sections. On the left is a sidebar with "Common Tasks" (Call Number and Item..., Label Designer, SmartPort, Item Search and Display, Check Item Status, Help, Print), "Titles", "Call Numbers and I...", "Authorities", and "Special". The main area is titled "Item Group Editor" and contains a search form with fields for Library, Home location, Price, Date created, Date inventoried, Media desk, Item type, Item category 1, Item category 2, Current location, Last activity date, Extended info, Reserve status, Permanent, Shaded, and Circulate. There are "Search" and "Clear" buttons, and radio buttons for "Single" and "Advanced" search modes. Below the search form are two empty tables: "Titles" and "Item List", both with columns for Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. At the bottom are buttons for "Create Group", "Edit Items", "Remove Items", "Clear Item List", and "Close". A red arrow points from the "Item/Group Search helper button" icon to the search icon in the "Item Group Editor" window.

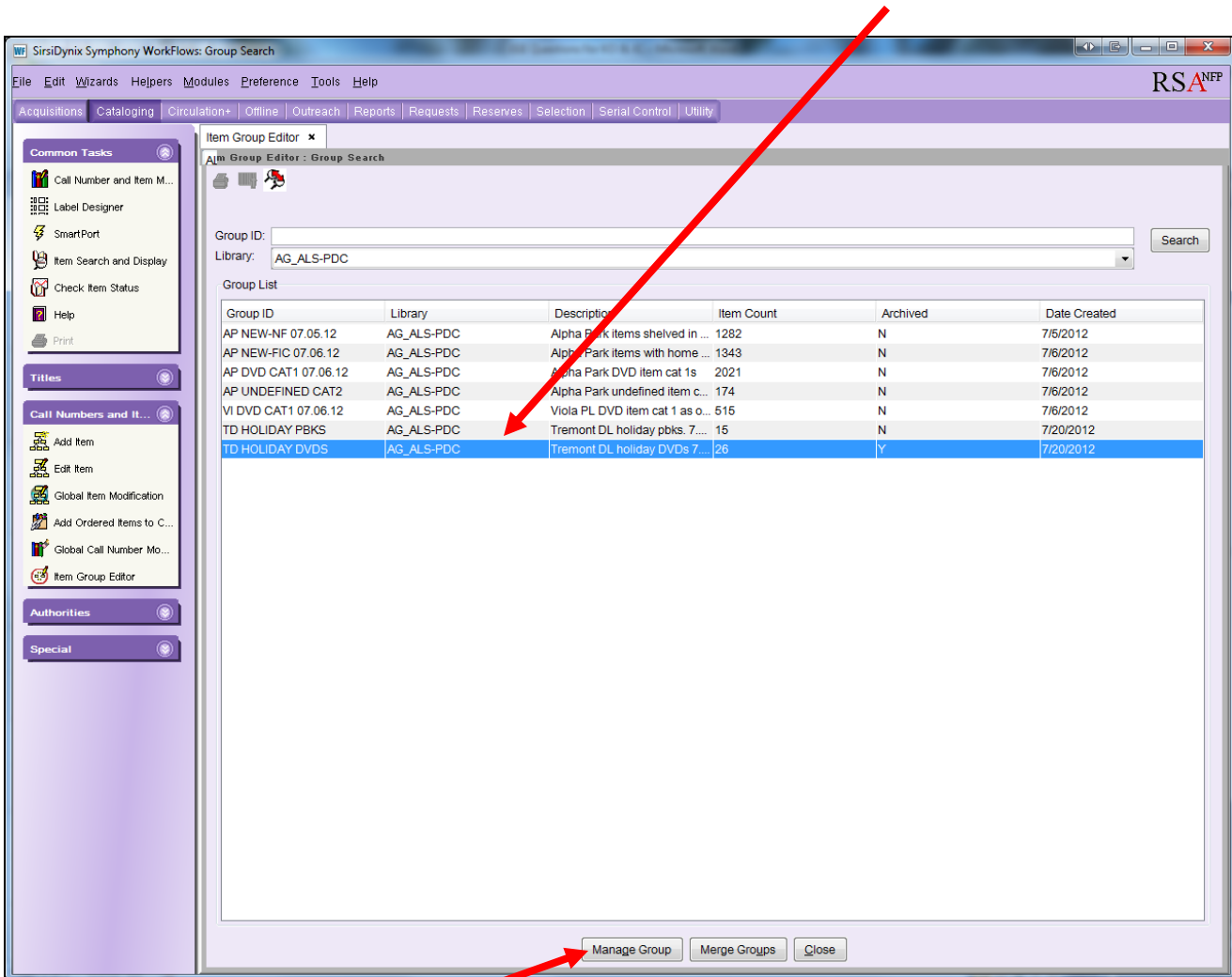
Resource Sharing Alliance

6. 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:



7. Click on the group you want to restore so that the group appears in blue:



8. 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:

Item Group Editor: Manage Group

Group Info

Group ID:  Date created: 7/20/2012 Created by: TECH Library: AG\_ALS-PDC  
 Description:  Date last modified: 7/20/2012 Last modified by: TECH

Item List: 26 records

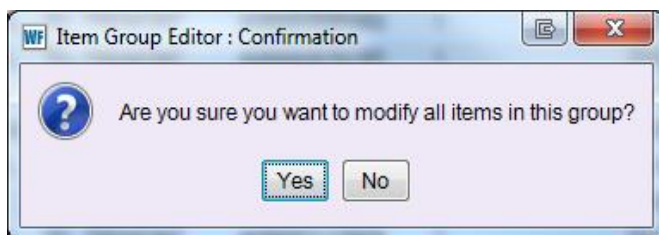
Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Mrs. Miracle [vide...	Sony Pictures Ho...	VID/DVD NR HOL	TD_TREMONT	A36580630285	1	DVD	CHECKEDOUT	N
Four Christmases ...	Spyglass Entertai...	VID/DVD PG-13	TD_TREMONT	A36580602931	1	DVD	DISPLAY	Y
Where God left his...	IFC Films.	VID/DVD NR HOL	TD_TREMONT	A36580601676	1	DVD	DISPLAY	Y
Nothing like the h...	Overture Films.	VID/DVD PG-13 H...	TD_TREMONT	A36580600311	1	DVD	DISPLAY	Y
The most wonderf...	ITV Global Enterta...	VID/DVD NR HOL	TD_TREMONT	A36580599421	1	DVD	CHECKEDOUT	N
An old-fashioned ...	RHI Entertainment...	VID/DVD NR HOL	TD_TREMONT	A36580599405	1	DVD	DISPLAY	Y
The Christmas ch...	Muse Entertainme...	VID/DVD NR HOL	TD_TREMONT	A36580599463	1	DVD	CHECKEDOUT	N
Fred Claus [videor...	Warner Bros. Pictu...	VID/DVD PG HOL	TD_TREMONT	A36580576180	1	DVD	CHECKEDOUT	N
Christmas cottage...	Birch Grove Films ...	VID/DVD PG HOL	TD_TREMONT	A36580590118	1	DVD	CHECKEDOUT	N
This Christmas [vi...	Screen Gems (19...	VID/DVD PG-13 H...	TD_TREMONT	A36580575590	1	DVD	DISPLAY	Y
The perfect holid...	Destination Films.	VID/DVD PG HOL	TD_TREMONT	A36580575346	1	DVD	DISPLAY	Y
Deck the halls [vid...	Regency Enterpris...	VID/DVD BKRM	TD_TREMONT	A36580547741	1	DVD	DISPLAY	Y
Irving Berlin's Whit...	Paramount Pictur...	VID/DVD NR HOL	TD_TREMONT	A36580113908	1	DVD	AVAILABLE	N
A Christmas too m...	Damn Good Enter...	VID/DVD PG-13 B...	TD_TREMONT	A36580549094	1	DVD	DISPLAY	Y
Truman Capote's ...	RHI Entertainment...	VID/DVD NR JUV ...	TD_TREMONT	A36580603319	1	DVD	DISPLAY	Y
Christmas in the cl...	Hannover House (...	VID/DVD HOL BK...	TD_TREMONT	A36580519942	1	DVD	DISPLAY	Y
The Christmas sh...	FremantleMedia.	VID/DVD NR HOLI...	TD_TREMONT	A36580518132	1	DVD	AVAILABLE	N
Frank Capra's It's ...	Paramount Pictur...	VID/DVD NR HOL	TD_TREMONT	A36580110170	1	DVD	CHECKEDOUT	N
A Christmas story ...	Metro-Goldwyn-M...	VID/DVD PG HOL	TD_TREMONT	A36580241117	1	DVD	CHECKEDOUT	N
A boyfriend for Ch...		VID/DVD NR BKRM	TD_TREMONT	A36580497645	1	DVD	DISPLAY	Y
The 12 dogs of Ch...	Screen Media Fil...	VID/DVD BKRM	TD_TREMONT	A36580534447	1	DVD	CHECKEDOUT	N
Christmas with the...	Sony Pictures Ho...	VID/DVD PG HOL	TD_TREMONT	A36580488523	1	DVD	CHECKEDOUT	N
The Nutcracker [vi...	Kultur Video.	VID/DVD NR HOL	TD_TREMONT	A36580603301	1	DVD	DISPLAY	Y
Christmas child [vi...	GoodTimes Entert...	VID/DVD NR BKRM	TD_TREMONT	A36580518085	1	DVD	CHECKEDOUT	N
National Lampoo...	Hughes Entertain...	VID/DVD BKRM	TD_TREMONT	A36580548357	1	DVD	DISPLAY	Y
The Christmas bo...	Bonneville Produc...	VID/DVD G BKRM	TD_TREMONT	A36580518386	1	DVD	DISPLAY	Y

Create Group Save Group Remove Group Edit Items Restore Items (b) New Search (d) Close

9. Click the Restore Items button at the bottom.

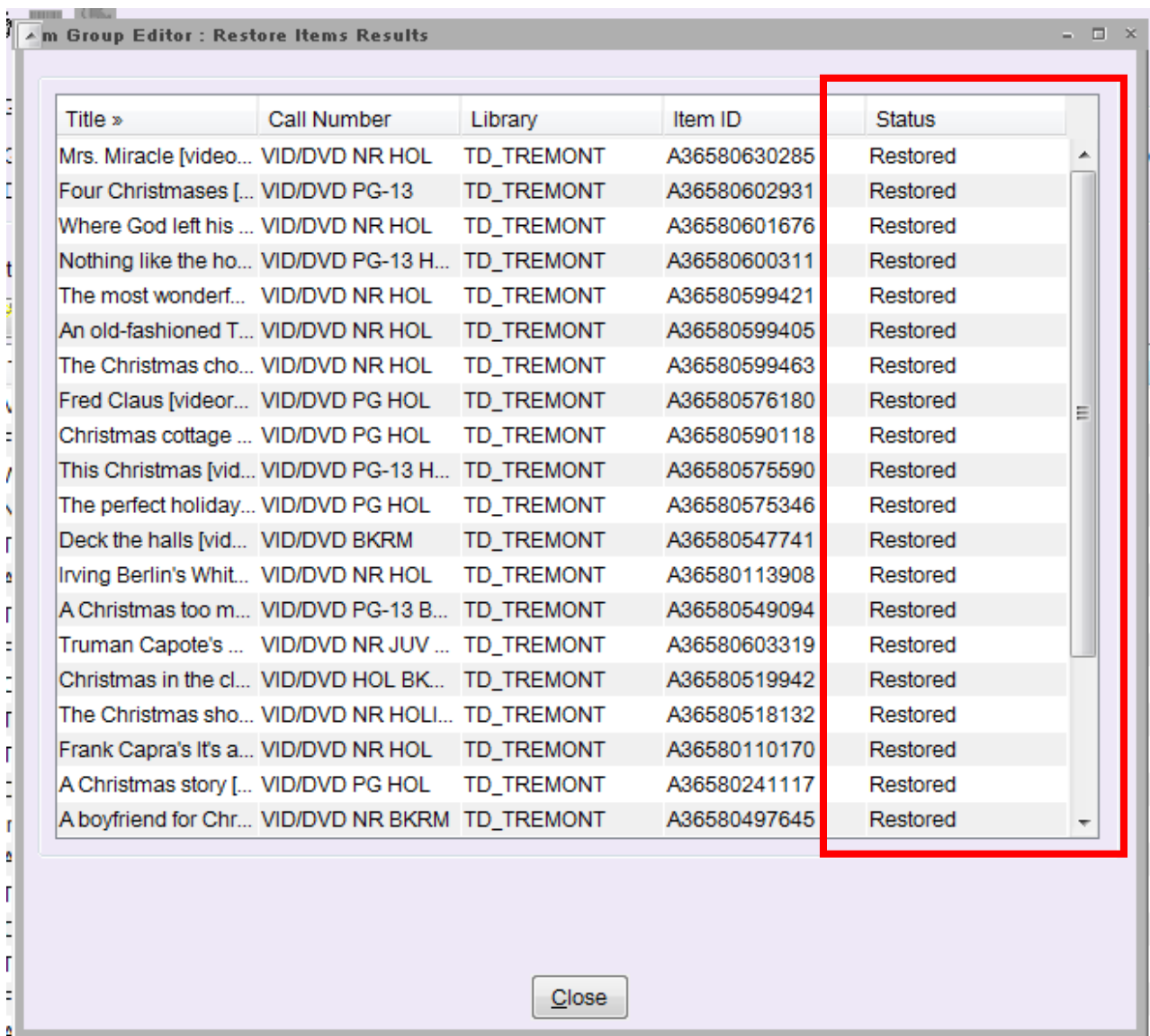
**Important:** The Restore Items button is only available for groups that have been archived. If the group was not archived, the Restore Items button will appear grayed out.

10. 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:



Title »	Call Number	Library	Item ID	Status
Mrs. Miracle [video...	VID/DVD NR HOL	TD_TREMONT	A36580630285	Restored
Four Christmases [...	VID/DVD PG-13	TD_TREMONT	A36580602931	Restored
Where God left his ...	VID/DVD NR HOL	TD_TREMONT	A36580601676	Restored
Nothing like the ho...	VID/DVD PG-13 H...	TD_TREMONT	A36580600311	Restored
The most wonderf...	VID/DVD NR HOL	TD_TREMONT	A36580599421	Restored
An old-fashioned T...	VID/DVD NR HOL	TD_TREMONT	A36580599405	Restored
The Christmas cho...	VID/DVD NR HOL	TD_TREMONT	A36580599463	Restored
Fred Claus [videor...	VID/DVD PG HOL	TD_TREMONT	A36580576180	Restored
Christmas cottage ...	VID/DVD PG HOL	TD_TREMONT	A36580590118	Restored
This Christmas [vid...	VID/DVD PG-13 H...	TD_TREMONT	A36580575590	Restored
The perfect holiday...	VID/DVD PG HOL	TD_TREMONT	A36580575346	Restored
Deck the halls [vid...	VID/DVD BKRM	TD_TREMONT	A36580547741	Restored
Irving Berlin's Whit...	VID/DVD NR HOL	TD_TREMONT	A36580113908	Restored
A Christmas too m...	VID/DVD PG-13 B...	TD_TREMONT	A36580549094	Restored
Truman Capote's ...	VID/DVD NR JUV ...	TD_TREMONT	A36580603319	Restored
Christmas in the cl...	VID/DVD HOL BK...	TD_TREMONT	A36580519942	Restored
The Christmas sho...	VID/DVD NR HOLI...	TD_TREMONT	A36580518132	Restored
Frank Capra's It's a...	VID/DVD NR HOL	TD_TREMONT	A36580110170	Restored
A Christmas story [...	VID/DVD PG HOL	TD_TREMONT	A36580241117	Restored
A boyfriend for Chr...	VID/DVD NR BKRM	TD_TREMONT	A36580497645	Restored

11. 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.

12. 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 values.

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:

The screenshot shows the 'Item Group Editor: Manage Group' window. The 'Group Info' section displays the following details:

- Group ID: TD HOLIDAY DVDS
- Date created: 7/20/2012
- Created by: TECH
- Library: AG\_ALS-PDC
- Description: Tremont DL holiday DVDs 7.20.12
- Date last modified: 7/20/2012
- Last modified by: TECH

The 'Item List' contains 26 records. The table below shows the first few rows of data:

Title	Author	Call Number	Library	Item ID	Copy Number	Type	Current Location	Circulate
Mrs. Miracle [vide...	Sony Pictures Ho...	VID/DVD NR HOL	TD_TREMONT	A36580630285	1	DVD	CHECKEDOUT	N
Four Christmases ...	Spyglass Entertai...	VID/DVD PG-13	TD_TREMONT	A36580602931	1	DVD	HOLIDAY	Y
Where God left his...	IFC Films.	VID/DVD NR HOL	TD_TREMONT	A36580601676	1	DVD	HOLIDAY	Y
Nothing like the h...	Overture Films.	VID/DVD PG-13 H...	TD_TREMONT	A36580600311	1	DVD	HOLIDAY	Y
The most wonderf...	ITV Global Enterta...	VID/DVD NR HOL	TD_TREMONT	A36580599421	1	DVD	CHECKEDOUT	N
An old-fashioned ...	RHI Entertainment...	VID/DVD NR HOL	TD_TREMONT	A36580599405	1	DVD	HOLIDAY	Y
The Christmas ch...	Muse Entertainme...	VID/DVD NR HOL	TD_TREMONT	A36580599463	1	DVD	CHECKEDOUT	N
Fred Claus [videor...	Warner Bros. Pictu...	VID/DVD PG HOL	TD_TREMONT	A36580576180	1	DVD	CHECKEDOUT	N
Christmas cottage...	Birch Grove Films ...	VID/DVD PG HOL	TD_TREMONT	A36580590118	1	DVD	CHECKEDOUT	N
This Christmas [vi...	Screen Gems (19...	VID/DVD PG-13 H...	TD_TREMONT	A36580575590	1	DVD	HOLIDAY	Y
The perfect holid...	Destination Films.	VID/DVD PG HOL	TD_TREMONT	A36580575346	1	DVD	HOLIDAY	Y
Deck the halls [vid...	Regency Enterpris...	VID/DVD BKRM	TD_TREMONT	A36580547741	1	DVD	HOLIDAY	Y
Irving Berlin's Whit...	Paramount Pictur...	VID/DVD NR HOL	TD_TREMONT	A36580113908	1	DVD	AVAILABLE	N
A Christmas too m...	Damn Good Enter...	VID/DVD PG-13 B...	TD_TREMONT	A36580549094	1	DVD	HOLIDAY	Y
Truman Capote's ...	RHI Entertainment...	VID/DVD NR JUV ...	TD_TREMONT	A36580603319	1	DVD	HOLIDAY	Y
Christmas in the cl...	Hannover House (...	VID/DVD HOL BK...	TD_TREMONT	A36580519942	1	DVD	HOLIDAY	Y
The Christmas sh...	FremantleMedia.	VID/DVD NR HOLI...	TD_TREMONT	A36580518132	1	DVD	AVAILABLE	N
Frank Capra's Its ...	Paramount Pictur...	VID/DVD NR HOL	TD_TREMONT	A36580110170	1	DVD	CHECKEDOUT	N
A Christmas story ...	Metro-Goldwyn-M...	VID/DVD PG HOL	TD_TREMONT	A36580241117	1	DVD	CHECKEDOUT	N
A boyfriend for Ch...		VID/DVD NR BKRM	TD_TREMONT	A36580497645	1	DVD	HOLIDAY	Y
The 12 dogs of Ch...	Screen Media Fil...	VID/DVD BKRM	TD_TREMONT	A36580534447	1	DVD	CHECKEDOUT	N
Christmas with the...	Sony Pictures Ho...	VID/DVD PG HOL	TD_TREMONT	A36580488523	1	DVD	CHECKEDOUT	N
The Nutcracker [vi...	Kultur Video.	VID/DVD NR HOL	TD_TREMONT	A36580603301	1	DVD	HOLIDAY	Y
Christmas child [vi...	GoodTimes Enter...	VID/DVD NR BKRM	TD_TREMONT	A36580518085	1	DVD	CHECKEDOUT	N
National Lampoo...	Hughes Entertain...	VID/DVD BKRM	TD_TREMONT	A36580548357	1	DVD	HOLIDAY	Y
The Christmas bo...	Bonneville Produc...	VID/DVD G BKRM	TD_TREMONT	A36580518386	1	DVD	HOLIDAY	Y

At the bottom of the window, there are several buttons: 'Create Group', 'Save Group', 'Remove Group', 'Edit Items', 'Restore Items (b)', 'New Search (d)', and 'Close'. A red arrow points to the 'Close' button.

13. 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 retrieve 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.
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 item group editor's advanced search screen opens.

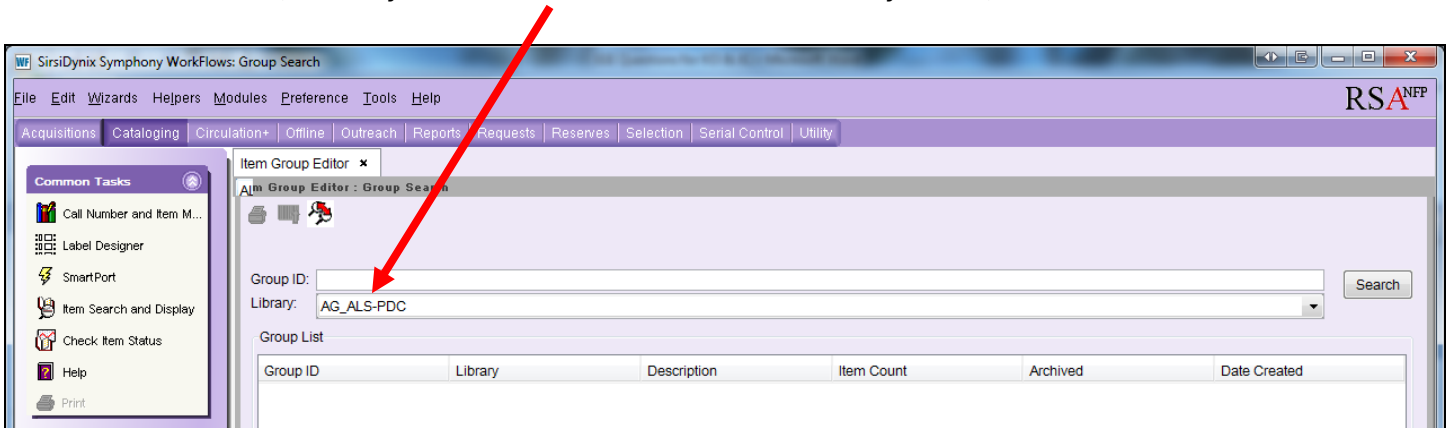
Click the Item/Group Search helper button:



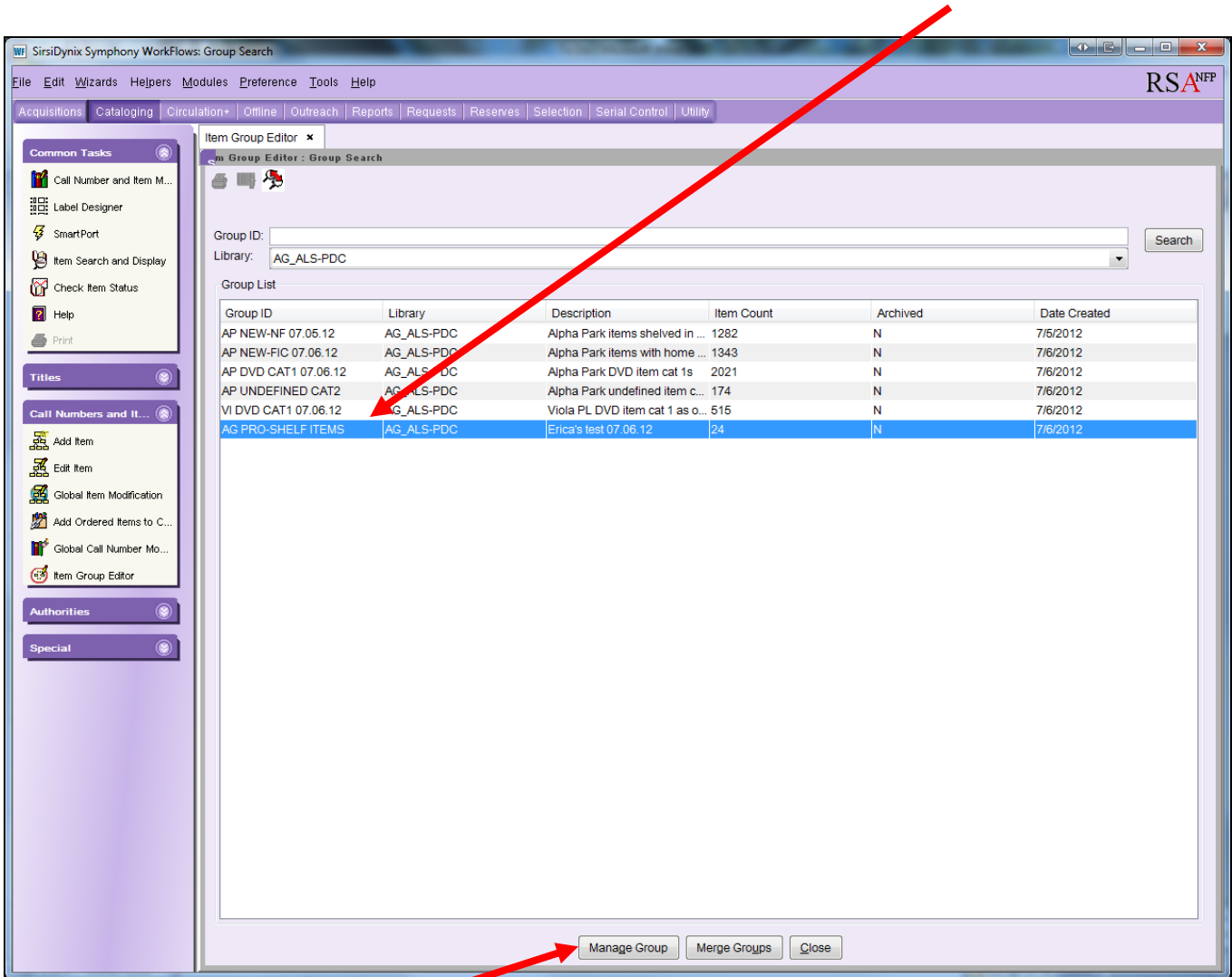
The screenshot shows the 'Item Group Editor' window in the SirsiDynix Symphony Workflows application. The window title is 'SirsiDynix Symphony Workflows: Item Search'. The interface includes a menu bar (File, Edit, Wizards, Helpers, Modules, Preference, Tools, Help) and a toolbar (Acquisitions, Cataloging, Circulation+, Offline, Outreach, Reports, Reserves, Selection, Serial Control, Utility). A left sidebar contains sections for 'Common Tasks', 'Titles', 'Call Numbers and I...', 'Authorities', and 'Special'. The main area is titled 'Item Group Editor' and features a search form with fields for Library, Home location, Price, Date created, Date inventoried, Media desk, Item type, Item category 1, Item category 2, Current location, Last activity date, and Extended info. There are also radio buttons for Permanent, Shaded, and Circulate, and a dropdown for Reserve status. Search and Clear buttons are present. Below the search form are two empty tables: 'Titles' and 'Item List', both with columns for Title, Author, Call Number, Library, Item ID, Copy Number, Type, Current Location, and Circulate. At the bottom are buttons for 'Create Group', 'Edit Items', 'Remove Items', 'Clear Item List', and 'Close'. A red arrow points from the 'Item/Group Search helper button' icon to the search form area.

6. 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:

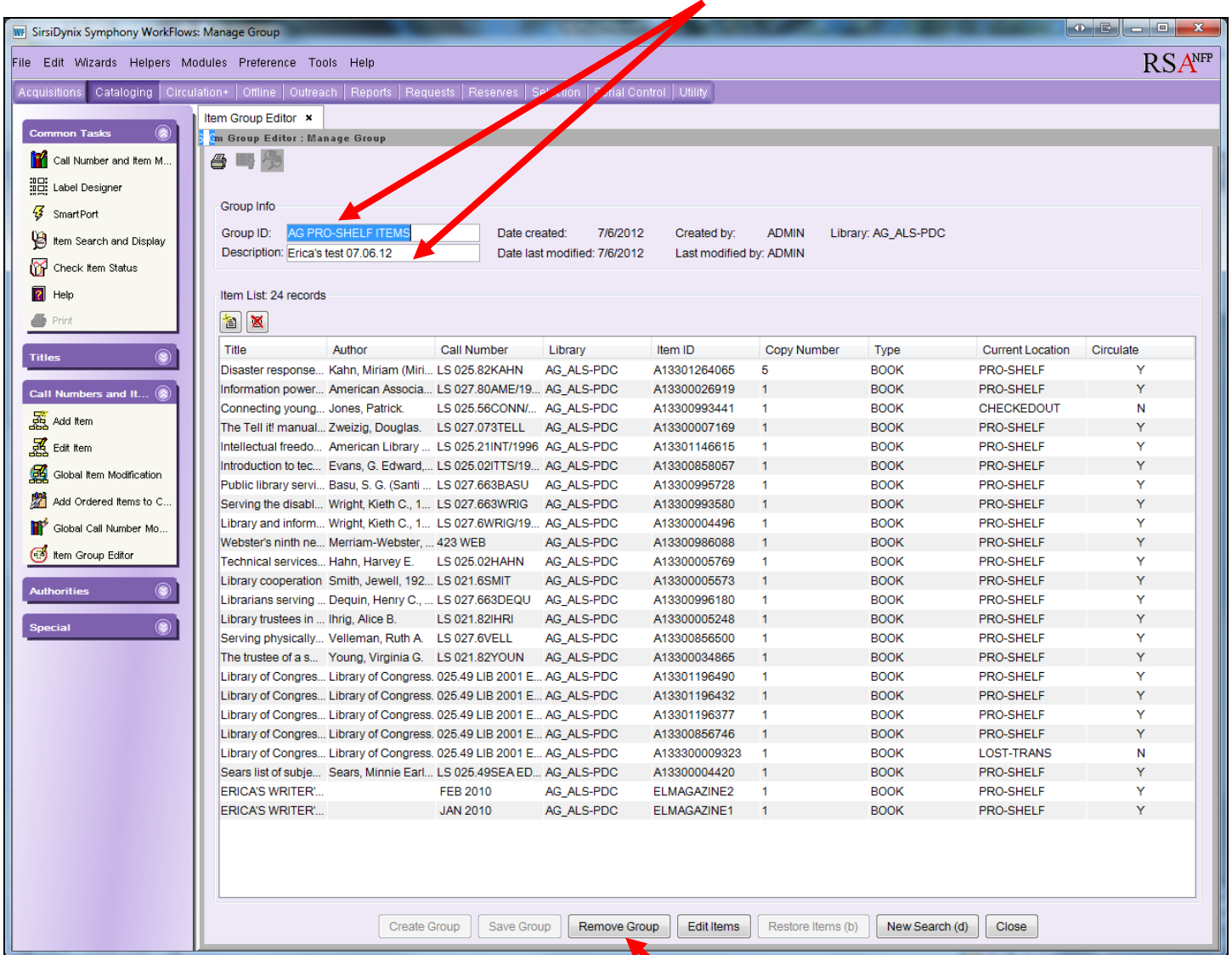


7. From the list of groups, click on the group to delete so that it appears in blue:



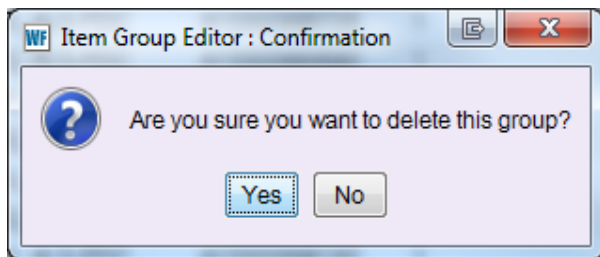
8. Click the Manage Group button at the bottom.

- 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:



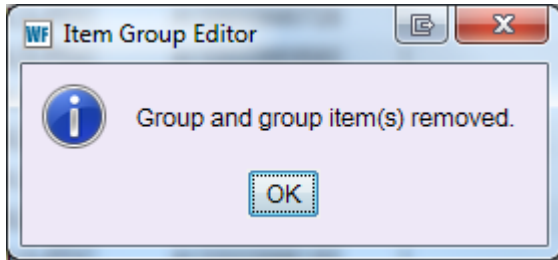
- Click the Remove Group button at the bottom.

- A pop-up box will appear, asking you to confirm the deletion:



Click "Yes" to delete the group.

12. 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 removed group remain in WorkFlows.



## 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 the RSAcat:**

The modified items, with their newly assigned values, are visible in the RSAcat one to two hours after you change them in the item group editor wizard, depending on when the RSAcat indexing cycle began.

### **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 RSAcat searches until the following day.

### **Running reports of recently modified items in BLUEcloud Analytics (BCA):**

Modifications made to items using the item group editor are not immediately visible in BCA. The WorkFlows Rebuild Item Database report will update BCA overnight. The modifications you made to items using the item group editor will only be visible in BCA the following day.

Once BCA 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 BCA, please contact the RSA Help Desk at [help@rsanfp.org](mailto:help@rsanfp.org) or 1-866-940-4083.