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Global Item Modification Wizard Guide

Last updated: August 13, 2026

This guide is available here: <https://support.librariesofrsa.org/project/global-item-modification-wizard/>

Please contact the RSA Help Desk at help@librariesofrsa.org or 1-866-940-4083 with any questions.

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What is the Global Item Modification wizard?

All WorkFlows cataloger accounts include access to the Global Item Modification (also called “Global Item Mod”) wizard. It allows you to select multiple values to edit for a group of items. Any combination of these values can be changed at one time using Global Item Mod:

- Item type
- Home location
- Item category 1
- Item category 2
- Item category 3
 - No need to edit item cat 3. RSA routinely runs an automated process to ensure each item is assigned the correct item cat 3 based on how it is cataloged.
- Item category 4
- Item category 5
- Item category 6
 - The only item cat 6 currently is OCLCEXCLUD. It is assigned to items whose holdings should not be updated in OCLC WorldCat during monthly processing. OCLCEXCLUD is also assigned to items that should be left cataloged on brief records, rather than upgraded to OCLC records. Item cat 6 is not visible to patrons using the RSACat or when running BLUEcloud Analytics reports.
- Item categories 7-10
 - These codes are not currently used.
- Item library
 - This code is only applicable if your library has a branch.
- Shadowed
- Permanent
- Circulate
- Price

Once you select values to edit in Global Item Mod, you will scan into the wizard each item ID that needs to be assigned those values. This wizard is a time-saver, allowing you to edit items quickly, eliminating the need to search and edit each item individually in the Call Number and Item Maintenance wizard.

After you edit an item in Global Item Mod, if you search for that item in another WorkFlows wizard, such as Call Number and Item Maintenance or Item Search and Display, the edited values will be reflected. However, there is a delay before the item will reflect its edited values in the RSACat – usually one to two hours, depending on when the indexing cycle began.

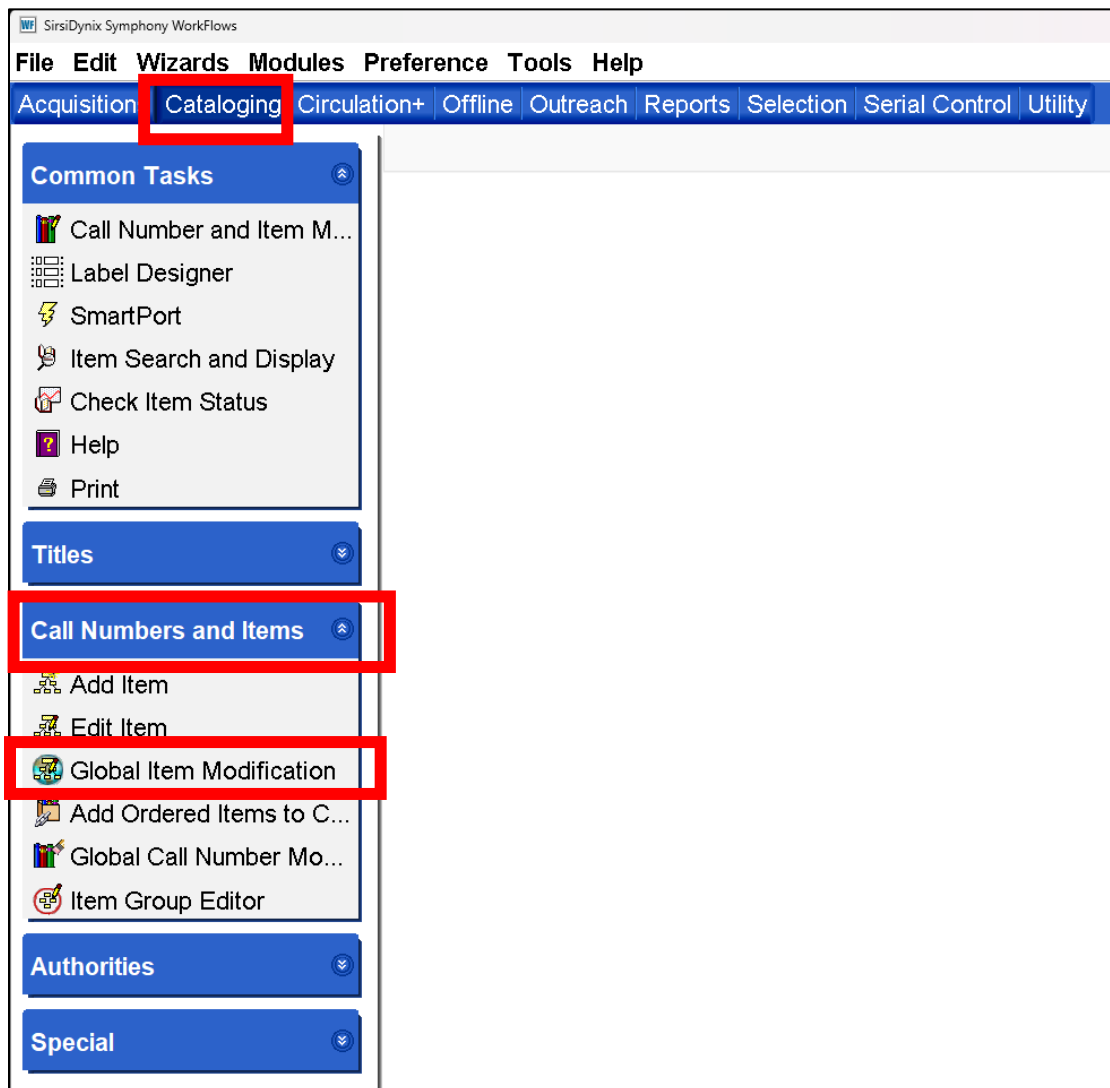
When should the Global Item Modification wizard be used?

Below are examples of when to use the Global Item Mod wizard that are not intended to be a complete list. Not all these examples may be applicable to your library.

- Your library no longer considers items assigned a “new” item type, such as N-BK, as new in your collection. They need to be assigned the BOOK item type so they can begin allowing holds from patrons at other RSA libraries.
- Your library shelved DVDs on a display, indicated by the DISPLAY home location. They need to be assigned the AV-MOVIE home location to indicate they are no longer on display.
- Several fiction audiobooks are assigned the UNDEFINED item category 1. They need to be assigned the FICTION item category 1 to power the fiction/nonfiction search facet in the RSACat.
- Several nonfiction children’s books are assigned the UNDEFINED item category 2. They need to be assigned the JUVENILE item category 2 to power the reading level facet in the RSACat.
- You pull books from the shelf that have mystery genre stickers on their spines. You want to edit them to the MYSTERY item category 4, which will power the genre search facet in the RSACat.
- You know patrons enjoy reading books with holiday themes. You pull Halloween books from the shelf to edit them to the HOL-HWEEN item category 5, which will power the sub-genre search facet in RSACat.
- Your library is renovating its young adult area. Since the items are unavailable for patrons to browse, you want to shadow them, which will hide them in the RSACat. Once the renovation is finished, you will unshadow them to make them visible in the RSACat.
- Your library has a stack of books that are not assigned prices. You want to assign \$20 as the price for each book to give you a better idea of its replacement cost if it becomes lost.

How do you use the Global Item Modification wizard?

1. Log into WorkFlows using your individual cataloger account.
2. Go to the Cataloging module.
3. Open the Call Numbers and Items group on the left.
4. Click on Global Item Modification.



5. The modification screen will open. Select the values you need to edit for your entire group of items. Any combination of values can be edited at one time, such as the item type, home location, and price, as shown below.

Global Item Modification *

Global Item Modification

Item ID: A13300995388

Item Values to Modify

Item type:	BOOK	Home location:	REFERENCE	Item category 1:	»Will not be modified
Item category 2:	»Will not be modified	Item category 3:	»Will not be modified	Item category 4:	»Will not be modified
Item category 5:	»Will not be modified	Item category 6:	»Will not be modified	Item category 7:	»Will not be modified
Item category 8:	»Will not be modified	Item category 9:	»Will not be modified	Item category 10:	»Will not be modified
Item library:	»Will not be modified	Shadowed:	»Will not be modified	Permanent:	»Will not be modified
Circulate:	»Will not be modified	Price:	\$40.00		

An important note about price:

If you enter any value into the price field, all items scanned into Global Item Mod will be assigned that price until the wizard is closed or reset.

The price of \$0 does not mean that the price will remain unchanged for the items scanned into the wizard. A value of \$0 will replace the item's existing price with \$0.

Leave the price value blank, displayed as \$, if the item's existing price should remain unchanged when the item IDs are scanned into the Global Item Mod wizard.

6. Once you select the values to edit, scan in the item ID for each item that needs to be assigned those values.

Global Item Modification *

Global Item Modification

Item ID: A13300995388

Item Values to Modify

Item type:	BOOK	Home location:	REFERENCE	Item category 1:	»Will not be modified
Item category 2:	»Will not be modified	Item category 3:	»Will not be modified	Item category 4:	»Will not be modified
Item category 5:	»Will not be modified	Item category 6:	»Will not be modified	Item category 7:	»Will not be modified
Item category 8:	»Will not be modified	Item category 9:	»Will not be modified	Item category 10:	»Will not be modified
Item library:	»Will not be modified	Shadowed:	»Will not be modified	Permanent:	»Will not be modified
Circulate:	»Will not be modified	Price:	\$40.00		

Title	Author	Call number	Copy	Item ID
Disaster response and plan...	Kahn, Miriam (Miriam B.)	LS 025.82KAHN	7	A13301264057
Creating policies for results ...	Nelson, Sandra S.	LS 025.1974 NELS 2003	1	A13301264015
Developing reference colle...	Cassell, Kay Ann.	LS 025.524CASS/1999	1	A13300995388

7. As you scan each item, the screen will confirm the item has been edited to the selected values.

Global Item Modification *

Global Item Modification

Item ID: A13300995388

Item Values to Modify

Item type:	BOOK	Home location:	REFERENCE	Item category 1:	»Will not be modified
Item category 2:	»Will not be modified	Item category 3:	»Will not be modified	Item category 4:	»Will not be modified
Item category 5:	»Will not be modified	Item category 6:	»Will not be modified	Item category 7:	»Will not be modified
Item category 8:	»Will not be modified	Item category 9:	»Will not be modified	Item category 10:	»Will not be modified
Item library:	»Will not be modified	Shadowed:	»Will not be modified	Permanent:	»Will not be modified
Circulate:	»Will not be modified	Price:	\$40.00		

Title	Author	Call number	Copy	Item ID
Disaster response and plan...	Kahn, Miriam (Miriam B.)	LS 025.82KAHN	7	A13301264057
Creating policies for results ...	Nelson, Sandra S.	LS 025.1974 NELS 2003	1	A13301264015
Developing reference colle...	Cassell, Kay Ann.	LS 025.524CASS/1999	1	A13300995388

Item type: BOOK-PBK Modified to: BOOK

Home location: NONFICTION Modified to: REFERENCE

Item category 1: NONFICTION

Item category 2: ADULT

Item category 3: BOOK

Item category 4: PROFESSNL

Item category 5: PAPERBACK

Item category 6: OCLCEXCLUD

Item category 7: UNDEFINED

Item category 8: UNDEFINED

Item category 9: UNDEFINED

Item category 10: UNDEFINED

Item library: AG_ALS-PDC

Shadowed: N

Permanent: Yes

Circulate: Yes

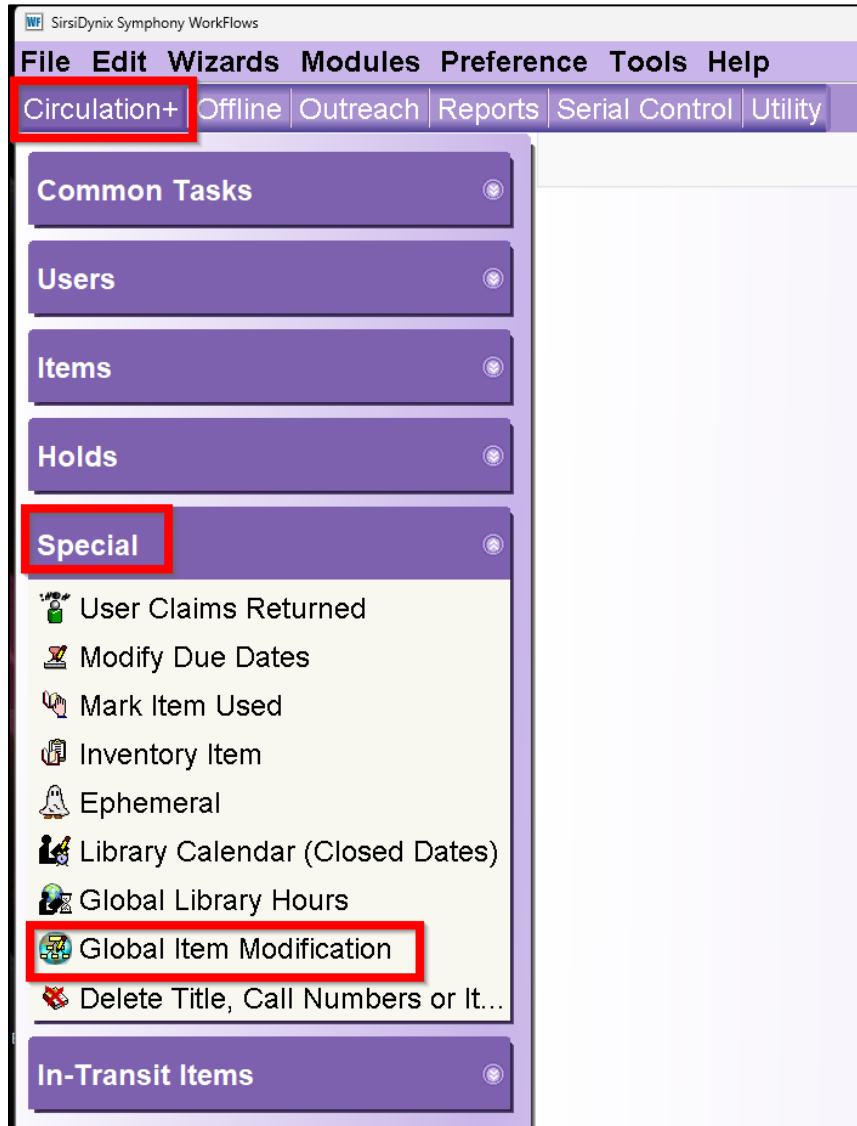
Price: \$20.00 Modified to: \$40.00

Mod / Reset Clear Close

8. To clear the list of edited items, click the <Clear> button at the bottom of the screen.
9. If you need to edit more items but assign them different values, click the <Reset> button at the bottom of the screen. Reset will de-select the values you selected for your first group of items.
- Once you click <Reset>, the menus at the top of the Global Item Mod wizard should display the default selection: "Will not be modified" or "\$". Repeat steps 5-8 for your next group of items.
10. When you have finished using the Global Item Mod wizard, click the <Close> button at the bottom of the screen.

Can circulation staff use the Global Item Modification wizard?

Some RSA libraries allow staff who are logged into WorkFlows with the circ account to use the Global Item Modification wizard. This wizard is in the Special group in the Circulation+ module.



Allowing circ staff to use Global Item Mod is a local library decision. If your library wants to do this, Directors and/or supervisors should reach out to the RSA Help Desk at help@librariesofrsa.org.

RSA will then provide the Director or supervisor with the override for circulation staff to use Global Item Modification while they are logged into WorkFlows with the circ account. Once RSA shares the override, the Director and/or supervisor are responsible for sharing it with the appropriate staff at their library.