

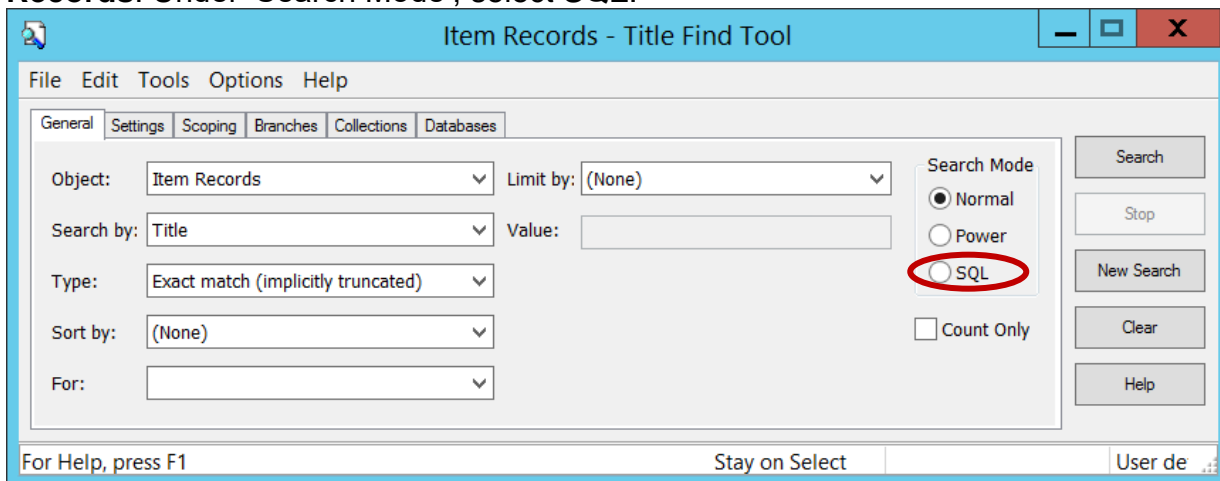
Item Maintenance Part 2: Data Integrity

Changing from New to Not New

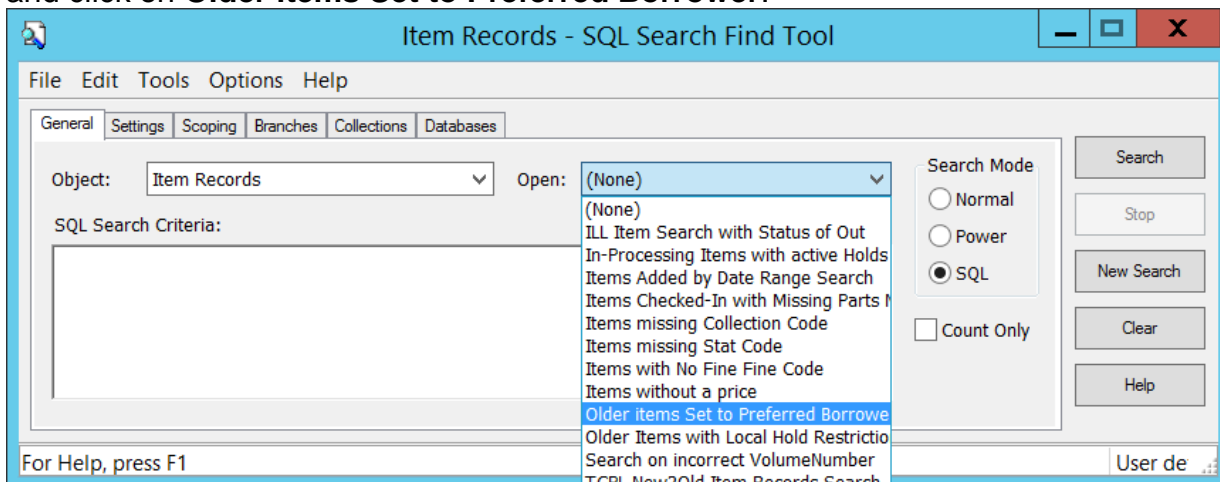
The hold request selections of “*Patrons from this library and branches*” & “*Patrons from this branch only*” will automatically switch to “*Preferred Borrowers*” after a designated time via overnight processing. However, you must manually change the following parameters after your items are no longer considered “New”: **Collection Code**, **Material type**, **Loan period**, **Fine code**, **Renewals**, and **Preferred borrowers**. You may find it helpful to enter all new items into a record set each month; if so, skip to step 6.

You can use a **SQL Search** to complete an **Ad hoc Bulk Change**. Your library may have missed some items when changing them from “New” to not new. Perform this SQL search to find older items that are still set to Preferred Borrowers. After locating the items, you can perform an Ad hoc Bulk Change.

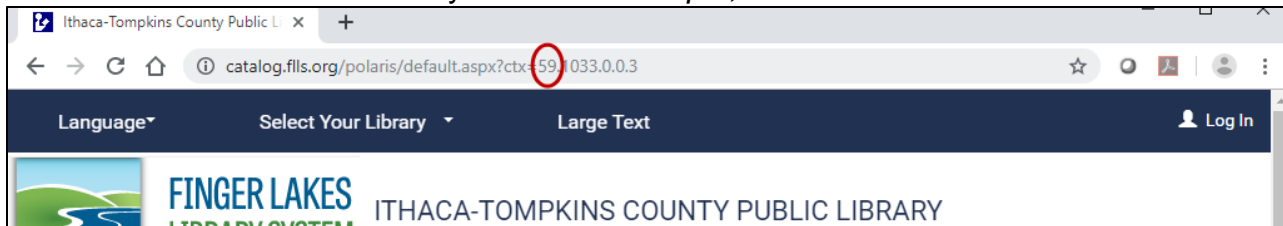
1. Open the Find Tool for item records. On the Polaris toolbar, click on **Cataloging** and then **Item Records**. Under ‘Search Mode’, select **SQL**.



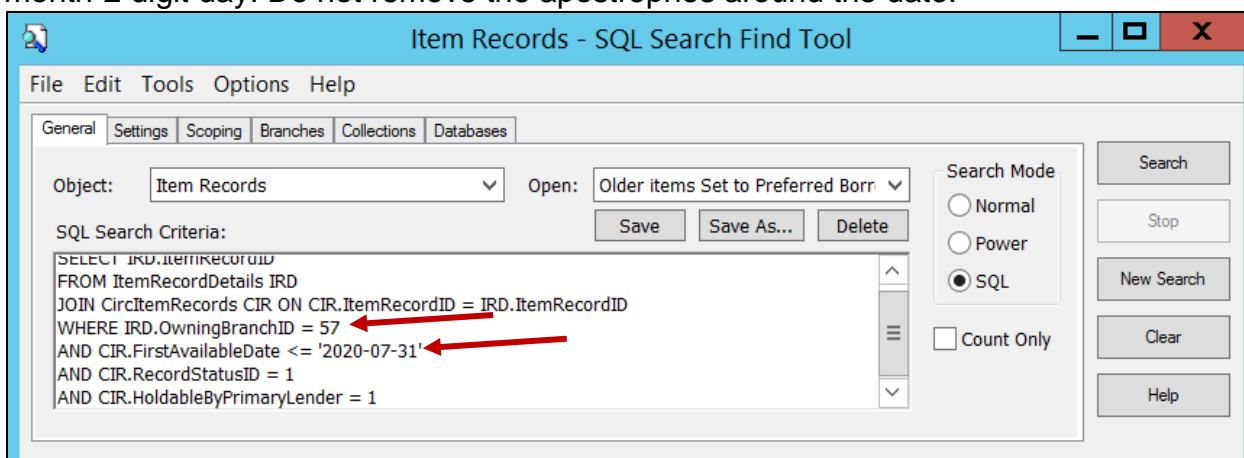
2. SQL searches look different than normal searches. Click in the drop down menu next to *Open* and click on **Older items Set to Preferred Borrower**.



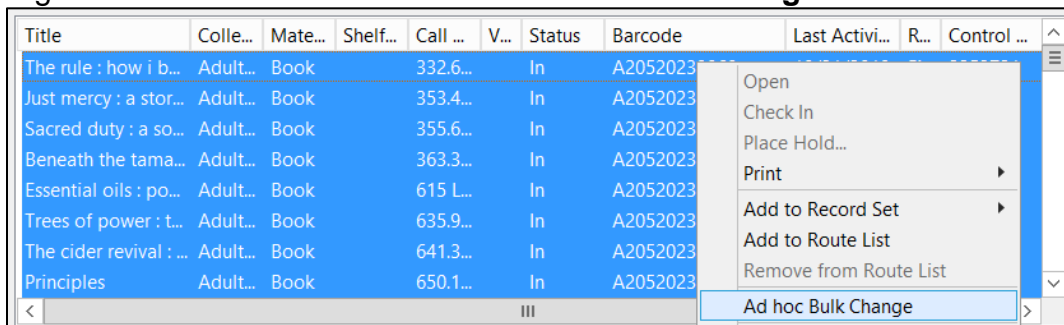
- You will have to change two fields to retrieve the correct results for your library. In the **WHERE IRD.OwningBranchID =** field, type the appropriate number for your library. To locate your library's number, either contact FLLS or open the PowerPAC catalog for your library. If your library name does not display, click on **Select Your Library** and make your selection. Then, look at the number after the = symbol. *For example, TCPL is 59.*



- Next, change the **First Available Date** to align with your parameters. For example: if my library removes the Preferred Borrowers designation for the new books after 6 months, I would type a date that is 6 months prior to today's date. Make sure to type out 4 digit year-2 digit month-2 digit day. Do not remove the apostrophes around the date.



- Click on **Search** and you may get some results. You can now Bulk Change these records directly from the search results. *Please Note: Some special items like kits can retain the Preferred Borrowers designation.*
- It is recommended that you perform separate Ad hoc Bulk Changes (or create separate record sets) for different "New" Collection Codes (Adult Fiction New, Adult Mystery New, etc.) and/or material types (Book, Videodisc, CD-Audiobook). Press **Ctrl Shift A** on your keyboard and click the *Collection Code* heading or *Material Type* heading to sort alphabetically. Then use **Ctrl Shift** on your keyboard and click on the beginning item and end item of a section to select only those items or hold the **Ctrl** button and click on specific items.
- Right click on the records and click **Ad hoc Bulk Change**.



8. Whether you are performing an Ad hoc Bulk Change or a Bulk Change in a record set, click on the **Circulation** tab. To remove the Preferred Borrowers designation, click the box next to **Holdable**. Then, click the box next to **Preferred Borrowers**. Lastly, click the box across from Preferred Borrowers to remove the check mark. You may also change Material type, Loan period, and Fine code if those currently include a “New” designation.

The screenshot shows the 'Circulation' tab of a library system interface. The 'Holdable' checkbox is checked, and the 'Preferred borrowers' checkbox is also checked. A red arrow points to the 'Holdable' checkbox, and another red arrow points to the 'Preferred borrowers' checkbox. A third red arrow points to the unchecked checkbox to the right of 'Preferred borrowers'. The interface includes tabs for Location, Circulation, Call Number, Notes/Blocks, Misc, and Report/Record Set. Below the checkboxes are buttons for OK, Cancel, and Help.

If you are also changing the Collection Code, click on the **Location** tab. Click in the box next to collection code and then make your selection. For example, if you use the “Adult Fiction New” collection code, make sure to select “Adult Fiction.”

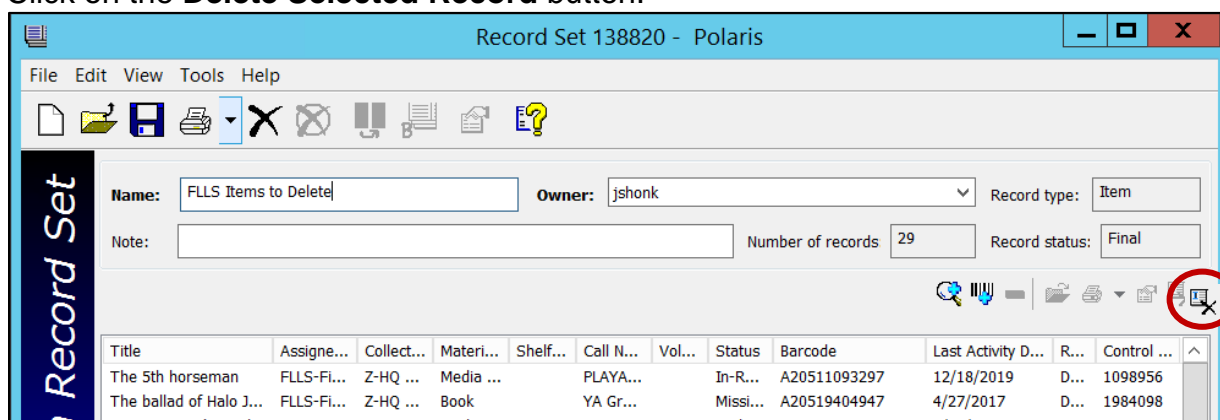
The screenshot shows the 'Location' tab of the 'Item Record Bulk Change' window. The 'Assigned collection' dropdown menu is selected, showing 'Adult Fiction (AF)'. A red arrow points to the 'Assigned collection' dropdown menu. The window title is 'Item Record Bulk Change - Number of records: 111'. The interface includes buttons for Save, Save As..., and Delete. Below the dropdown menu are buttons for OK, Cancel, and Help.

9. Click on **OK**. The Summary of Changes will appear, click on **Continue**. A window will pop up letting you know that the changes were successful (or not). View to the bulk change report to see any errors.

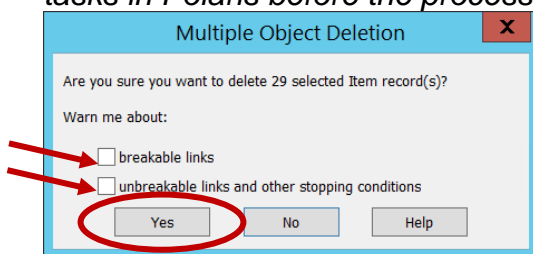
Deleting Items Properly

The most efficient method of deleting multiple Item Records in Polaris is batch deletion using a record set. *Please Note: It is not necessary to change items to withdrawn before deletion.*

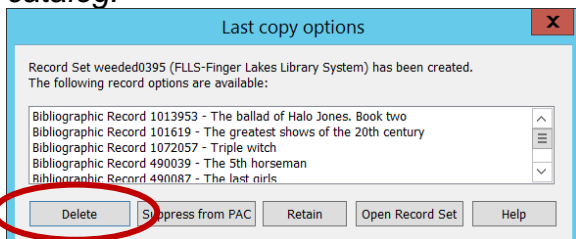
1. First, create a new Record Set: **File** → **New** → **Record Set** → **Item**. Name your Record Set (please follow the established naming convention, ex. *SENF Items to Delete*). Select the **Scan by Barcode** icon and scan the barcodes of the items you wish to delete into the Record Set. Save the Record Set. Or you can select an existing Item Record Set and skip to step 2.
2. Once the items are in a record set, it's simple and painless to delete the records using the **Delete Selected Records** button located in the middle toolbar. *Please Note: Items that have a status of "Checked Out" or items have current have hold requests cannot be deleted.*
3. Selecting all the records first allows you to delete them all at once. Press **CTRL Shift A** on your keyboard to retrieve all the records then press **CTRL A** (Select All) to highlight all records. Click on the **Delete Selected Record** button.



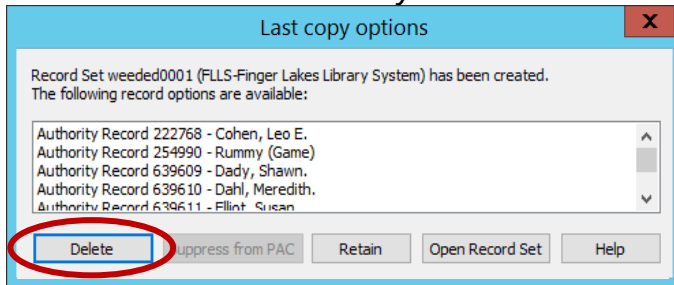
4. The **Multiple Object Deletion** dialog box will pop up. Uncheck the 2 checkboxes which will prevent any dialog boxes from popping up during the deletion process. Click on **Yes**. *Please Note: This process may take some time. Please be patient and do not try to perform any other tasks in Polaris before the process is complete.*



5. Once the Items are deleted, you will see another Dialog Box prompting you to delete the Bibliographic Records that no longer have any Items attached. Click on **Delete**. *Please Note: This must be done because we don't want bibliographic records without items to display in the catalog.*



- Once the empty bibs are deleted, you may see another Dialog Box prompting you to delete the unlinked Authority Records. Click on **Delete**. *Please Note: This must be done because we don't want unlinked authority records in the catalog.*

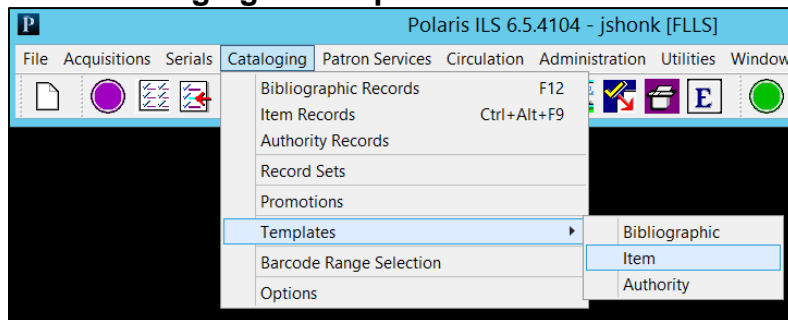


Any records left in the record set are items that could not be deleted. It could be that the item circulation status is “Out” or there may be a hold request linked to the Item. Open each item to find out why. If there is a hold request associated then you will need to cancel the request before the item can be deleted. Or reconsider deleting the item.

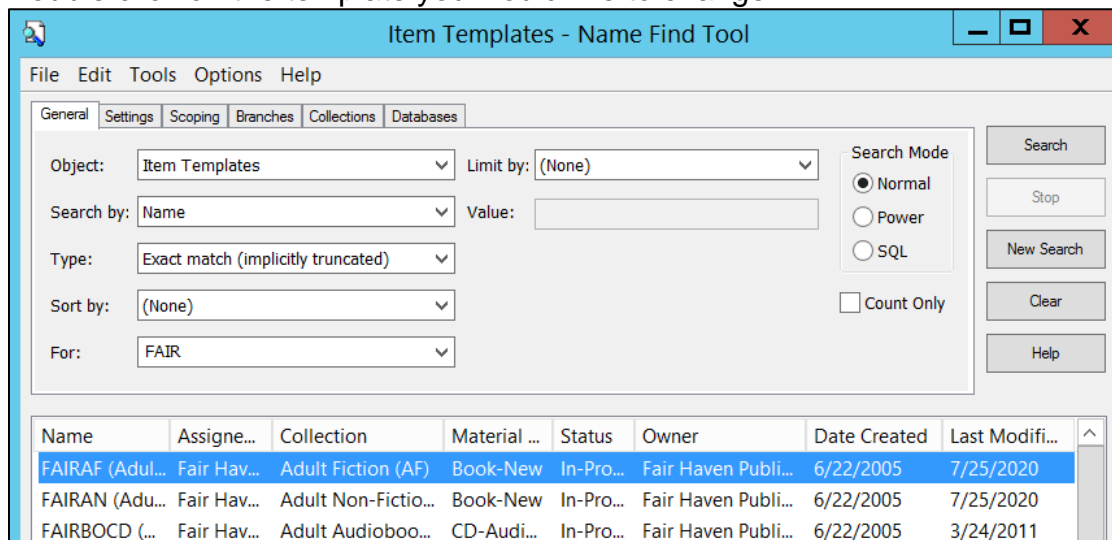
Working with Item Templates

Are you finding yourself selecting an item template and making changes to it every time? If so, you can edit your templates to fit your needs.

- Go to **Cataloging → Templates → Item**.



- Type your library short code and click **Search**.
- Double click on the template you would like to change.



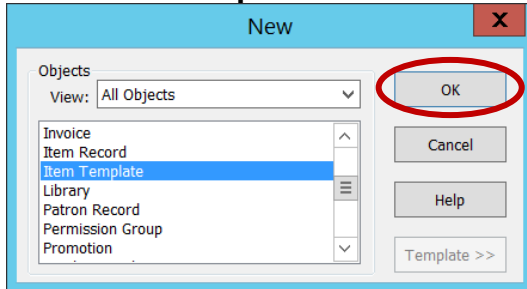
4. Make the necessary changes to the template's parameters.

5. Click the **Save** icon when you are finished.

You can also create a new item template, if needed.

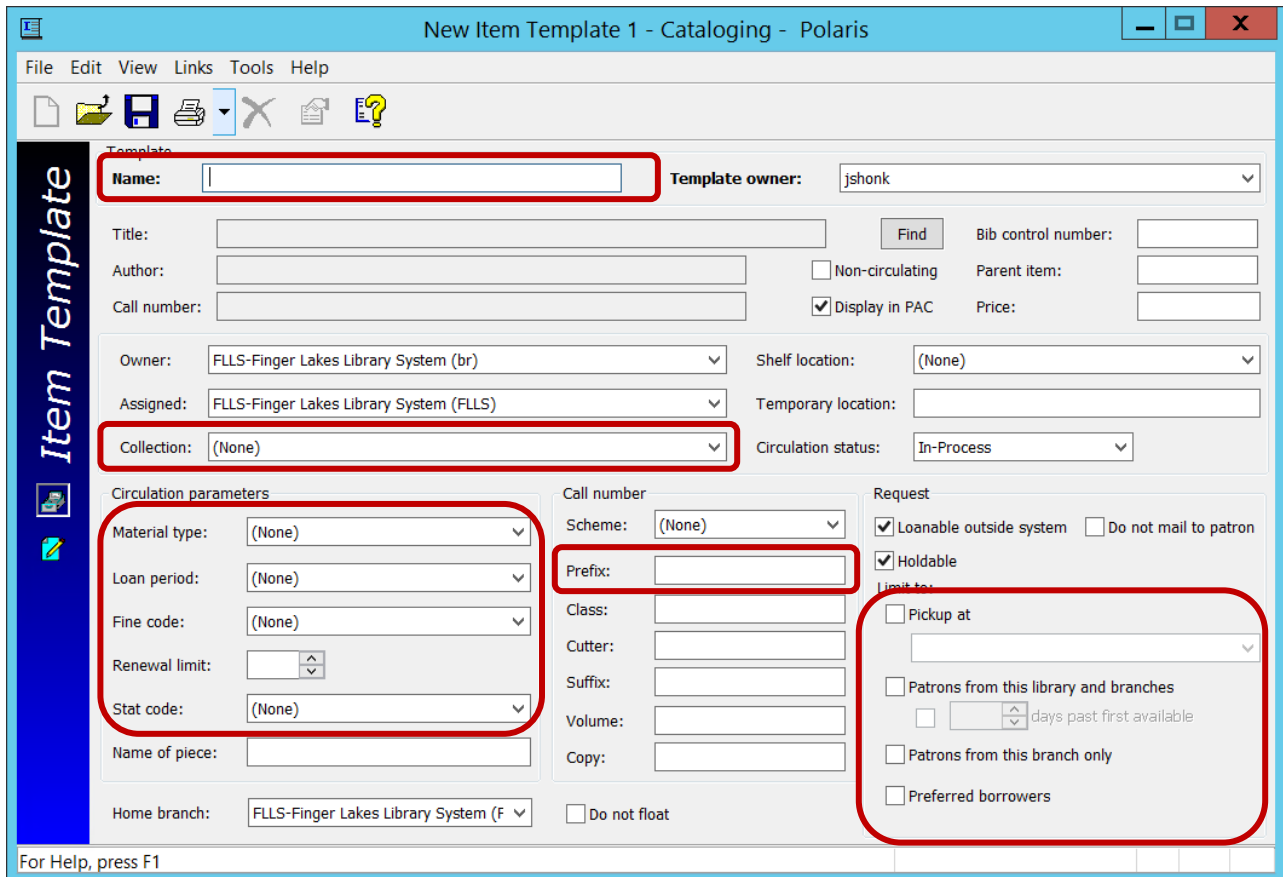
1. Click on the **New** icon or go to **File → New**.

2. Select **Item Template** and click **OK**.



3. Fill out the template with your desired parameters, please see image below for pertinent fields.

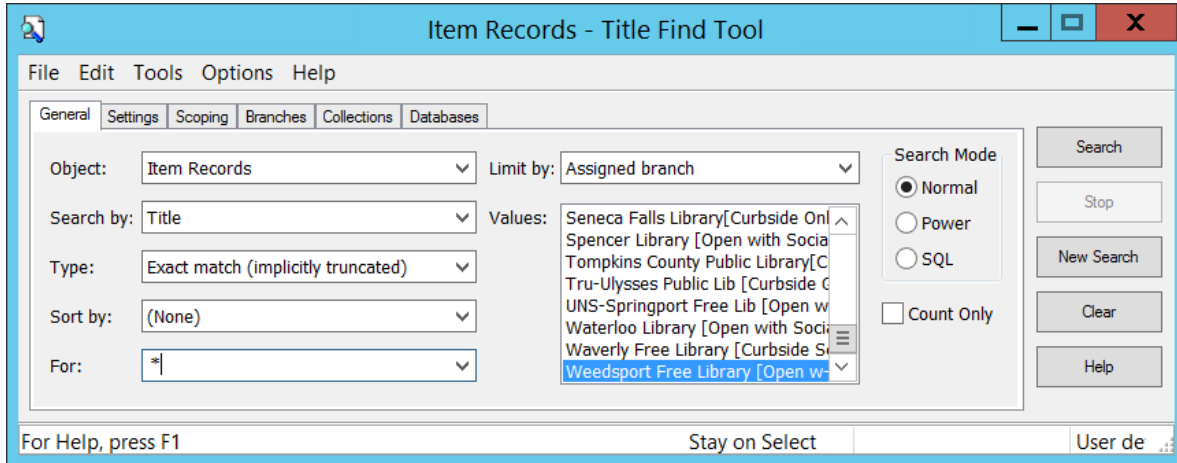
Please follow standard naming conventions: Library Code/Abbreviation + Age Range + Collection Abbreviation + “N” if new. This is followed by the name of the collection in parentheses. **Example:** New Adult Fiction at Auburn = AUBAFN (Adult Fiction New).

A screenshot of the 'New Item Template 1 - Cataloging - Polaris' window. The window has a menu bar (File, Edit, View, Links, Tools, Help) and a toolbar with icons for file operations. The main area is titled 'Item Template' and contains various input fields and dropdown menus. Red boxes highlight several key fields: the 'Name' field at the top left; the 'Collection' dropdown menu; the 'Material type' dropdown in the 'Circulation parameters' section; the 'Prefix' field in the 'Call number' section; and the 'Request' section, which includes checkboxes for 'Loanable outside system', 'Holdable', and 'Patrons from this library and branches', along with a 'Pickup at' dropdown and a 'Preferred borrowers' checkbox. The 'Template owner' is set to 'jshonk'. The 'Owner' is 'FLLS-Finger Lakes Library System (br)'. The 'Assigned' is 'FLLS-Finger Lakes Library System (FLLS)'. The 'Circulation status' is 'In-Process'. The 'Home branch' is 'FLLS-Finger Lakes Library System (F)'. The status bar at the bottom says 'For Help, press F1'.

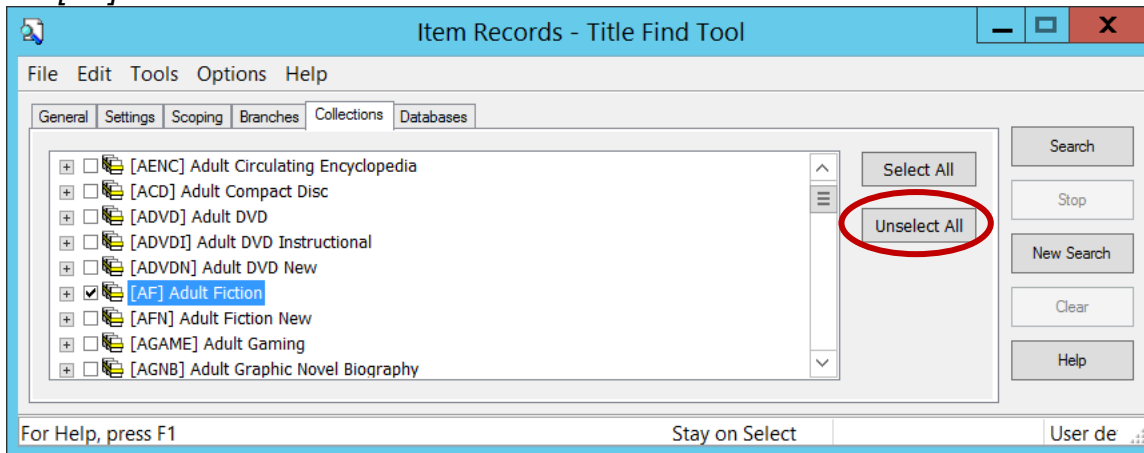
Checking Your Item Records & Call Numbers

Have you checked your records for consistency and accuracy recently? Here is a quick and easy search that will help you analyze each collection.

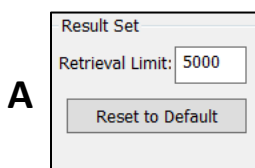
1. Open the Item Record Find Tool. On the taskbar, click on **Cataloging** → **Item Records**.
2. Click on **(None)** in the **Limit by** box and select **Assigned Branch**. Click on your library name in the **Value** box. Put an asterisk ***** in the **For** field.



3. Click on the **Collections** tab. Click on **Unselect All**. Check the box next the desired collection, ex. **[AF] Adult Fiction**. Click on **Search**.



4. Hit **Ctrl Shift A** on your keyboard to retrieve all results. You may have to increase the Retrieval Limit on the **Settings Tab** if your collection contains over 1000 items (See *image A*). Click on the **Call Number**, **Volume Number**, **Collection**, or **Shelf Location** headings to sort the items (See *Image B*). Scroll through and double click on an item to fix any disparities, i.e. the call number and collection don't match, incorrect volume number, etc. You should be able to clearly see any errors that have been made.

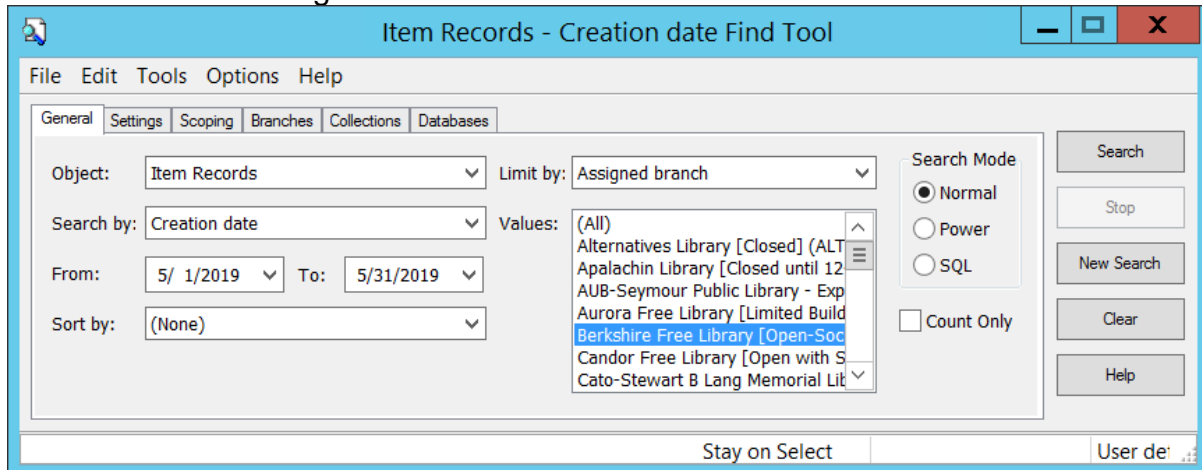


B

Title	Assig...	Colle...	Mate...	Shelf...	Call Number	V...	Status	Barcode
Jane Eyre	Weed...	Adult...	Book	F Bronte,	In	A205034263...		
The witness	Weed...	Adult...	Book	F Brown	In	A205148771...		
The house of the s...	Weed...	Adult...	Book	F Classic Hawt...	In	A205034292...		
The goodly letter	Weed...	Adult...	Book	F Classic Hawt...	In	A205148771...		

You can also search for items by Creation Date.

1. Open an item record search. On the taskbar, click on **Cataloging** → **Item Records**.
2. Click on **(None)** in the **Limit by** box and select **Assigned Branch**. Click on your library name in the **Value** box.
3. In **Search by**, select **Creation Date**. Enter your desired dates. Click on Search. Press **Ctrl Shift A** on your keyboard to retrieve all results. From there you can sort the items by clicking on the various headings or add them to a Record Set.



Questions? Comments? Contact:



Computer Network Services Department
1300 Dryden Road, Ithaca, NY 14850
(607) 273-4074 x237 or efranks@flls.org

Deb Geier, Technical Services Librarian
(607) 273-4074 x233 or dgeier@flls.org