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 7.

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**.

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

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For Help, press F1		Search on incorrect VolumeNumber TCPL New2Old Item Records Search		User de 🔡

3. 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.

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4. 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. Don't remove the apostrophes around the date.

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- 5. 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.*
- 6. Press **Ctrl Shift A** on your keyboard to retrieve all results then **Ctrl A** to Select All search results, which will highlight all the records. Right click on the records and click **Ad hoc Bulk Change**.

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Sacred duty : a so	Adult	Book		355.6			A2052023			e Hold				
Beneath the tama	Adult	Book		363.3			A2052023		Print					
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If you also have to change the "New" designations for Material Type, Loan Period, and Fine Code, make sure to perform separate Ad hoc Bulk Changes for different types of materials (Book, Videodisc, CD-Audiobook). Instead of using Select All, use **Ctrl Shift** 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.

7. Whether you are performing an Ad hoc Bulk Change or a Bulk Change in a record set, click on the Circulation tab. Remove the Preferred Borrowers designation in the window that pops up. First, click the box next to Holdable. Second, click the box next to Preferred Borrowers. Third, 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.

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Preferre	ed borrowers:				
Non circulating			and floods		
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Loanable outs	ide system:	Do	not mail to	o patron:	
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8. 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

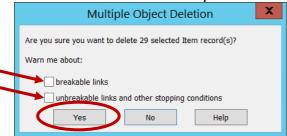
The most efficient method of deleting multiple Item Records in Polaris is batch deletion using a record set. *Please Note: It is not necessary to change items to withdrawn before deletion.*

- 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.

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Name:	FLLS Items t	to Delete			Owne	er: jshon	k			✓ Record	type:	Item
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Title		Assigne	Collect	Materi	Shelf	Call N	Vol	Status	Barcode	Last Activity D	. R	Control
The 5th I	norseman	FLLS-Fi	Z-HQ	Media		PLAYA		In-R	A20511093297	12/18/2019	D	1098956
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Bart Sim	pson's treeh	FLLS-Fi	Z-HQ	Book		YA Gr		With	A20515274950	1/31/2020	D	1331251
Bart Sim Beerfest The bone Complete		FLLS-Fi	Z-HQ	Video		DVD C		With	A20516359216	1/22/2020	Fi	1492887
The bone	house	FLLS-Fi	Z-HQ	CD-Au		BOCD		In-R	A20519096388	11/25/2019	D	1458786
Complete	e copyright :	FLLS-Fi	Z-HQ	Book		ProGE		Missi	A20517874390	2/7/2017	Fi	1700785
	tower. The	FLLS-Fi	Z-HQ	Book		Graphi		In-R	A20514942403	7/17/2020	Fi	1302710
Grand the	eft auto V.	FLLS-Fi	Z-HQ	Electr		GAME		Lost	A20518672911	5/30/2019	Fi	1878983
The grea	test shows	FLLS-Fi	Z-HQ	CD-Au		CD 79		With	A20516780988	9/12/2017	D	844692
Hoodwin	ked	FLLS-Fi	Z-HQ	Video		DVD C		With	A20511086884	11/21/2019	Fi	1003164
House, M	I.D. Season	FLLS-Fi	Z-HQ	Video		DVD D	d. 1-5	Lost	A20516778062	9/16/2019	Fi	1575020
I see the	science! Sc	FLLS-Fi	Z-HQ	Media		J Laun		In-R	A20518097365	1/14/2020	D	1809021
InuYasha	. The demo	FLLS-Fi	Z-HQ	Video		DVD A		Lost	A20518087386	8/6/2020	Fi	1724458
The last	girls	FLLS-Fi	Z-HQ	Media		PLAYA		In-R	A20511093417	12/17/2019	D	1099324
Lego star	wars: the	FLLS-Fi	Z-HQ	Electr		GAME		In-R	A20514026689	11/11/2019	Fi	1243263
Lovejoy.	The comple	FLLS-Fi	Z-HQ	Video		DVD M	d. 1-3	With	A20519092326	1/27/2020	D	1909105
			Z-HQ	Video					A20519092287	7/30/2018	_	1909103

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.*

Last copy options	X
Record Set weeded0395 (FLLS-Finger Lakes Library System) has been created. The following record options are available:	
Bibliographic Record 1013953 - The ballad of Halo Jones. Book two Bibliographic Record 101619 - The greatest shows of the 20th century Bibliographic Record 1072057 - Triple witch Bibliographic Record 490039 - The Sth horseman Bibliographic Record 490087 - The last oirls	< III >
Delete Buppress from PAC Retain Open Record Set H	ielp

6. 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.*

Last copy options									
Record Set weeded0001 (FLLS-Finger Lakes Library System) has been created. The following record options are available:									
Authority Record 222768 - Cohen, Leo E. Authority Record 254990 - Rummy (Game) Authority Record 639609 - Dady, Shawn. Authority Record 639610 - Dahl, Meredith. Authority Record 639611 - Elliot Susan	^ ~								
Delete Suppress from PAC Retain Open Record Set H	elp								

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.

1. Go to **Cataloging** \rightarrow **Templates** \rightarrow **Item**.



2. Type your library short code and click Search.

2)		Item	Templates	s - Nam	e Find Tool		_ 🗆 X
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Name	Assigne	Collection	Material	Status	Owner	Date Created	Last Modifi
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FAIRAN (Adu	Fair Hav	Adult Non-Fictio	Book-New	In-Pro	Fair Haven Publi	6/22/2005	7/25/2020
FAIRBOCD (Fair Hav	Adult Audioboo	CD-Audi	In-Pro	Fair Haven Publi	6/22/2005	3/24/2011

- 3. 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** \rightarrow **New**.
- 2. Select Item Template and click OK.

	New
Objects View: All Objects	~ ОК
Invoice Item Record	^ Cancel
Item Template Library Patron Record	= Help
Permission Group Promotion	✓ Template

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

<u>Please follow standard naming conventions:</u> 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).

Item Template 1 - Cataloging - Polaris - ロ ×											
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For Help, press	s 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** \rightarrow **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.

2)	Item Records - Title Find Tool	_ 🗆 X
File Edit Tools Options Help General Settings Scoping Branches Collections	Databases	
Object: Item Records	Limit by: Assigned branch Search Mo	
Search by: Title Type: Exact match (implicitly truncated)	Values: Seneca Falls Library[Curbside Onl ^ Spencer Library [Open with Socia Tompkins County Public Library[C Tru-Ulysses Public Lib [Curbside C	New Search
Sort by: (None)	✓ UNS-Springport Free Lib [Open w Waterloo Library [Open with Soci; □ Waverly Free Library [Curbside S] □	
	Weedsport Free Library [Open w- →	Help
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3. Click on the **Collections** tab. Click on **Unselect All**. Check the box next the desired collection, *ex.* [AF] Adult Fiction. Click on **Search**.

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[AGNB] Adult Graphic Novel Biography	Help
For Help, press F1 Stay on Select	User de 🚑

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.

	Result Set Retrieval Limit: 5000 Reset to Default 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 second st latter	M/seed	Alleria	Deele	E Classia Haut		lue.	1005100174

You can also search for items by Creation Date.

- 1. Open an item record search. On the taskbar, click on **Cataloging** \rightarrow **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.

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Sort by: (None) 🗸	Aurora Free Library [Limited Build Berkshire Free Library [Open-Soc Candor Free Library [Open with S Cato-Stewart B Lang Memorial Lit	Only Clear Help
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Questions? Comments? Contact:



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