Copies Utilities

Operations

Utilities

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Add Copy Notes

Add Copy Notes

Adds a Copy or Alert note to selected copies

The new note will append to the end of the note field.

> ✅ Copy Notes are automatically added when a copy is lost, found, discarded, or returned from being discarded.

Copies Utilities

Selections | **Options**

Add the note specified under the Options tab to:

Copies at Site	AMS – Adams Middle School ▾
Copies with a Status of	Any ▾
Copies with a Policy of	Any Policy ▾
Copies from	Copy Location ▾ From Through
Copies with a Medium of	Any Medium ▾
Copies in Call Number Range	From Through
Copies added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▾
Copies from Title	
Copies in Barcode Range	From Through
Copies with Barcodes	

☑ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections | **Options**

Add Note

Note Type ◉ Copy Note
          ○ Alert Note

☐ Replace Existing Notes

Add Note: Type the note you would like to add.

Note Type: Choose the type of note to add.

Replace Existing Notes: When checked, this option remov chosen type and completely replaces them with what's in th

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Change Copy Call Numbers

Change Copy Call Numbers

Changes various components of selected copy call numbers (prefixes, case, slashes, and matching to title call numbers)

✅ Check out Keep it straight—Title vs Copy Call Number to learn the difference between title and copy call numbers.

Use(s)

- Librarians can use this utility to change call numbers to their preferred style.

- Use this utility to help genrefy your library's collection.

- If a school district comes out with new standards, librarians can use this utility to quickly reorganize their collection.

- Use this utility to clean up differences between title and copy call numbers.

Selections

This utility will make batch changes to Copy Call Numbers with the addition of formatting options.

Copies at Site	AMS – Adams Middle School ▼
Copies with a Status of	Any ▼
Copies with a Policy of	Any Policy ▼
Copies from	Copy Location ▼ From Through
Copies with a Medium of	Any Medium ▼
Copies with a Genre of	
Copies in Call Number Range	From Through
Copies added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Copies from Title	
Copies in Barcode Range	From Through
Copies with Barcodes	

☑ **Show Additional Selections**   Create Saved Utility   Run

Copies with a Genre of: This selection includes all terms that look similar. For example, a selection for "Fantasies" would also include "Fantasy."

Options

Selections | **Options**

Change Call #   ● No Change   Add
○ Add prefix
○ Remove prefix   Remove
○ Replace prefix
○ Match Copy to Title Call Number   Replace

with

Formatting rules will be applied to Copy Call Numbers after the above

Change Case   ● No Change
○ All Letters Uppercase
○ All Letters Lowercase
○ First Letter Uppercase

☐ Remove Slashes

Change Call

No Change: Choose this option if you don't want to make a

Add prefix: Appends the new prefix entered into the **Add** fi numbers. If adding a prefix results in exceeding the 50 chai will be skipped.

Remove prefix: Removes the text entered into the **Remov** numbers. Additional spaces are removed as well if there ar

Replace prefix: Replaces the existing call number entered new call number entered into the **with** field. The **Replace** fi "fiC" would replace both "FIC" and "fic"). If replacing a prefi character limit, that call number will be skipped.

Match Copy to Title Call Number: Changes selected copi title call number.

⚠ Removing and replacing only affect the first word o example, if the original call number is "FIC BIO," yc but *not* just "F" to "P." Also, you could change "FIC

Change Case

No Change: Choose this option if you don't want to make a

All Letters Uppercase: e.g. FIC BIO

All Letters Lowercase: e.g. fic bio

First Letter Uppercase: e.g. Fic Bio

Remove Slashes

When checked, this option will remove all forward slashes (

Change Copy Condition

Change Copy Condition

Changes the condition of selected copies

🗐 **Textbook Tracker**

✓

You can customize your library's condition codes in **Preferences > Codes > Condition Codes**. Usually these are used to indicate if copies are new or used. But they can also be used to add ratings for movies and graphic novels.

Selections

Options

Change Condition to: Specify the new condition you would

Change Copy Location

Change Copy Location

Textbook Tracker

Changes the location (852_b MARC tag) of selected copies

⚠ "Copy Location" is a localization term that can be altered in Terminology Preferences.

Use(s)

- Run this utility if you use the Copy Location field and have physically moved copies to new locations.

- Run this utility with the **Copies in Call Number Range** or **Copies with a policy of** selections if you need to add locations based on call number or policy/genre.

Selections | **Options**

Change the Copy Location to the value specified under the Options tab for:

Copies at Site	AMS – Adams Middle School ▼
Copies with a Status of	Any ▼
Copies with a Policy of	Any Policy ▼
Copies from	Copy Location ▼	From	Through
Copies with a Medium of	Any Medium ▼
Copies in Call Number Range	From	Through
Copies added	From MM/DD/YYYY 🗓	Through MM/DD/YYYY 🗓 ▼
Copies from Title	
Copies in Barcode Range	From	Through
Copies with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Selections | **Options**

Change Copy Location to [   ]

Change Copy Location to: Specify the new location you w
have.

Change Copy Policy

Change Copy Policy

📚 **Textbook Tracker**

Changes the policy of selected copies

> ⚠ If you would like to update the due dates for checked out items based on the new policies, you will need to run the *Recompute Due Dates utility* after this utility.

Use(s)

Run this utility if you've made changes to your policies and they differ by site. However, if your policies are the same across all of your sites, use the *Change Title Policy utility* instead.

Selections

Selections | **Options**

Change the copy policy to the value specified under the Options tab for:

Copies at Site	AMS – Adams Middle School ▾
Copies with a Status of	Any ▾
Copies with a Policy of	Any Policy ▾
Copies from	Copy Location ▾ [From] [Through]
Copies with a Medium of	Any Medium ▾
Copies in Call Number Range	[From] [Through]
Copies added	[From MM/DD/YYYY 📅] [Through MM/DD/YYYY 📅] ▾
Copies from Title	[ ]
Copies in Barcode Range	[From] [Through]
Copies with Barcodes	[ ]

☑ **Show Additional Selections**   **Create Saved Utility**   **Run**

Options

Selections | **Options**

○ Match copy to its title policy
● Change Policy to

[Standard Item ▾]

Match copy to its title policy: When selected, the utility w
match that of the title.

Change Policy to: Specify the new policy you would like se

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Change Copy Shelving

Change Copy Shelving

Textbook Tracker

Changes the shelving (852_c MARC tag) of selected copies

⚠ "Copy Shelving" is a localization term that can be altered in Terminology Preferences.

Selections	Options

Change the Copy Shelving to the value specified under the Options tab for:

Copies at Site	AMS – Adams Middle School ▼
Copies with a Status of	Any ▼
Copies with a Policy of	Any Policy ▼
Copies from	Copy Location ▼ From Through
Copies with a Medium of	Any Medium ▼
Copies in Call Number Range	From Through
Copies added	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Copies from Title	
Copies in Barcode Range	From Through
Copies with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Selections	Options

Change Copy Shelving to [   ]

Change Copy Shelving to: Specify the new shelving you
have.

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Change Copy Site

Change Copy Site

◼ **Textbook Tracker**

Changes the site (852_a MARC tag) of selected copies

Use(s)

Run this utility if you have moved a bunch of copies to a different site or have accidentally imported copies to the wrong site.

Selections

Selections | Options

Change copy sites to the site specified in the Options tab for:

Copies at Site	AMS – Adams Middle School ▾
Copies with a Status of	Any ▾
Copies with a Policy of	Any Policy ▾
Copies from	Copy Location ▾ From Through
Copies with a Medium of	Any Medium ▾
Copies in Call Number Range	From Through
Copies added	From MM/DD/YYYY 🗓 Through MM/DD/YYYY 🗓 ▾
Copies from Title	
Copies in Barcode Range	From Through
Copies with Barcodes	

✔ Show Additional Selections   Create Saved Utility   Run

Options

Selections | Options

New Site   AMS

New Site: Specify the new site you would like selected cop

<div align="right">Back to Top</div>

Change Funding Source

Change Funding Source

Textbook Tracker

Changes the funding source of selected copies

⚠ "Funding Source" is a localization term that can be altered in Terminology Preferences.

Use(s)

Run this utility with the **Copies added** selection after importing new items to add a funding source. You can then run yearly usage reports for donors and other sources.

Selections | **Options**

Change the Funding Source to the value specified under the Options tab for:

Copies at Site	AMS – Adams Middle School ▼
Copies with a Status of	Any ▼
Copies with a Policy of	Any Policy ▼
Copies from	Copy Location ▼	From	Through
Copies with a Medium of	Any Medium ▼
Copies in Call Number Range	From	Through
Copies added	From MM/DD/YYYY 🗓	Through MM/DD/YYYY 🗓 ▼
Copies from Title	
Copies in Barcode Range	From	Through
Copies with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility   Run**

Selections | **Options**

Change Funding Source to _____

Change Funding Source to: Specify the new funding sour
copies to have.

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Change Purchase Cost

Change Purchase Cost

Textbook Tracker

Changes the purchase cost of selected copies

There are four options when changing the purchase cost amount:

- *Change Purchase Cost to:* Completely replaces the old purchase cost with the new value

- *Change Purchase Cost by [ ] $:* Adds the old purchase cost to the new value
  - e.g. old value ($10) + new value ($8) = $18

- *Change Purchase Cost by [ ] %:* Adds the old purchase cost to the old value times the entered percentage
  - e.g. old value ($10) + (old value ($10) * percentage (100%)) = $20

- *Match to Replacement Cost:* Changes each selected copy's purchase cost to its replacement cost.

Use(s)

Run this utility if you need to add purchase costs for inventory purposes or originally entered the wrong information.

Selections | Options

Change the purchase cost as specified under the Options tab for:

Copies at Site — AMS – Adams Middle School ▼

Copies with a Status of — Any ▼

Copies with — Purchase Cost ▼ | From | Through

Copies with a Policy of — Any Policy ▼

Copies from — Copy Location ▼ | From | Through

Copies with a Medium of — Any Medium ▼

Copies in Call Number Range — From | Through

Copies added — From MM/DD/YYYY 📅 | Through MM/DD/YYYY 📅 ▼

Copies from Title —

Copies in Barcode Range — From | Through

Copies with Barcodes

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Selections | **Options**

◉ Change Purchase Cost to   to
○ Change Purchase Cost by [ ] $ by $
○ Change Purchase Cost by [ ] %   by %
○ Match to Replacement Cost

Back to Top

Change Replacement Cost

Change Replacement Cost

Textbook Tracker

Changes the replacement cost of selected copies

There are four ways to change the replacement cost amount on the Options tab:

- **Change Replacement Cost to:** Completely replaces the old replacement cost with the new value

- **Change Replacement Cost by _____ Dollars:** Adds the old replacement cost to the new value
  - e.g. old value ($10) + new value ($8) = $18

- **Change Replacement Cost by __ %:** Adds the old replacement cost to the old value times the entered percentage
  - e.g. old value ($10) + (old value ($10) * percentage (100%)) = $20

- **Match to Purchase Cost:** Changes the old replacement cost to match the copy's purchase cost

Use(s)

- Run one of these utilities if you need to add replacement costs for reporting/fine purposes or had originally entered the wrong information.

- If you would like to set your replacement cost a certain amount over the purchase cost for a group of copies, first run this utility to set the replacement cost to the purchase cost. Then run it again and add X amount to the replacement cost.

Change Vendor

Change Vendor

Changes the vendor of selected copies

Change Vendor to: Specify the new vendor you would like

Check Out to Standard Patron

Check Out

Checks out selected copies to the specified patron or system patron

Note that this utility will check the copies out even if a) the patron has reached their policy limit or b) the item was checked out to a different patron before. Reference the summary file after you run this operation in order to review any of these important details.

Selections

Options

Check out to patron barcode: Specify the barcode of the to check out selected copies.

Check out to: Specify the system patron to whom you wou copies.

Declare Checked Out Copies Lost

Declare Checked Out Copies Lost

Declares as lost (checked out to System Patron 1) selected copies that are currently checked out to patrons

Use(s)

- Run this utility at the end of the school year to declare all items that were never returned as lost.

- Use the **Patrons with a Policy of** selection if you only want to declare copies lost for certain patrons. For example, you may want to exclude teachers when running this utility at the end of the year.

Selections | **Options**

- ● Charge Lost Fees & Overdue Fines
- ○ Charge Lost Fees Only

Declare Missing Copies Discarded

Declare Missing Copies Discarded

Declares as discarded (checked out to System Patron 2) all selected copies with an *Available* status that have not been inventoried since the specified **Inventory Start Date**

Selections

Selections

Declare as discarded all selected copies with an available status that have not been inventoried since the specified Inventory Start Date.

Copies at Site	AMS – Adams Middle School ▼
Inventory Start Date	From MM/DD/YYYY 📅
Copies with a Policy of	Any Policy ▼
Copies from	Copy Location ▼ From Through
Copies with a Medium of	Any Medium ▼
Copies in Call Number Range	From Through

Create Saved Utility   Run

Inventory Start Date: Enter an inventory date in MM/DD/YYYY format. This field is required.

Declare Missing Copies Lost

Declare Missing Copies Lost

Declares as lost (checked out to System Patron 1) all selected copies with an *Available* status that have not been inventoried since the specified **Inventory Start Date**

Selections

Inventory Start Date: Enter an inventory date in MM/DD/YYYY format. This field is required.

Unknown macro: 'multiexcerpt-include-macro'

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Reassign Union Site Copies

⚠ This utility is only available to those with a Centralized Catalog.

Reassign Union Site Copies

Moves selected copies from the Union Site to the specified site

⚠ Union Site copies always maintain a status of *In Processing*. Even when you move those copies, they will still have the *In Processing* status. Bookdrop your recently moved copies or run the *Check In Processing Copies* utility to change their status to *Available*.

Use(s)

- Run this utility if you accidentally imported items with an invalid site code and need to move those copies to the intended site.

- If you purposely use the Union Site to store *In Processing* copies, run this utility when those copies have been processed and need to be moved.

Selections

Selections | **Options**

Move copies from the Union Site to the site specified under the Options tab. Note that these copies will still have a status of In Processing after being moved. Move:

Copies added | From MM/DD/YYYY [📅] | Through MM/DD/YYYY [📅] | [▼]

Create Saved Utility   **Run**

Copies added: Enter the date range or relative date of when the copies you would like to reassign were added.

Options

Selections | **Options**

New Site | AMS

New Site: Specify the site to which you'd like to move the U

Remove Archived Copies

Remove Archived Copies

Removes selected copies that have been archived (checked out to System Patron 6)

Use(s)

Run this utility to clean out old records if you're approaching your item limit.

Textbook Tracker

Selections

Selections | Options

Remove archived copies for:

Copies at Site	AMS – Adams Middle School ▾
Copies with a Policy of	Any Policy ▾
Copies from	Copy Location ▾	From	Through
Copies in Call Number Range	From	Through
Copies Archived	From MM/DD/YYYY 📅	Through MM/DD/YYYY 📅 ▾
Copies in Barcode Range	From	Through
Copies with Barcodes	

✔ **Show Additional Selections**   **Create Saved Utility**   **Run**

Copies Archived: Select copies by date range to ensure that only copies archived a long time ago are removed.

Options

Selections | Options

☑ Remove Titles with No Copies

Remove Titles with No Copies: When checked, this optio... records with no other copies once the archived copies are r...

Remove Copies

Remove Copies

Textbook Tracker: *Remove Textbook Copies*

Removes selected copy records

There are three ways to handle copies that are checked out:

- **Declare Lost.** The copies are declared lost and patrons are charged appropriately.

- **Remove.** The copies are removed. CAUTION: There will be no record of the copies being checked in if you choose this option.

- **Keep.** The copies will not be removed if they are checked out.

Remove Copy History

Remove Copy History

Removes the check out history of selected copies

What kind of copy history does this utility remove? Everything in the **Previous checkouts** section of a copy's statistics is cleared. However, the **Check out Count** remains the same, and nothing in the copy record—including notes—is removed.

Selections

Remove Copy Notes

Remove Copy Notes

Removes all notes of the specified type for selected copies

Use(s)

Run this utility to remove outdated notes a past librarian added to various copies.

Note Type: Specify the type of note to remove from selecte

Remove Discarded Copies

Remove Discarded Copies

Removes selected copies that have been discarded (checked out to System Patron 2)

Use(s)

Run this utility to clean out old records if you're approaching your item limit.

Selections	Options
Selections **Options**	**Selections** **Options**
Remove discarded copies for:	☑ Remove Titles with No Copies
Copies with a Policy of [Any Policy ▾]	
Copies from [Copy Location ▾] [From] [Through]	
Copies in Call Number Range [From] [Through]	
Copies Discarded [From MM/DD/YYYY 📅] [Through MM/DD/YYYY 📅] [▾]	
Discard Reason [ ]	
Copies in Barcode Range [From] [Through]	
Copies with Barcodes [ ]	
✔ Show Additional Selections Create Saved Utility Run	

Copies Discarded: Select copies by date range to ensure that only copies discarded a long time ago are removed.

Remove Titles with No Copies: When checked, this option records with no other copies once the discarded copies are

Remove Lost Copies

Remove Lost Copies

Removes selected copies that have been declared lost (checked out to System Patron 1)

Since copies can be lost in different ways, there are three types of lost copies you can remove:

- **Patron.** Removes copies that were lost by patrons. These have associated fines and are likely to be returned later.

- **Inventory.** Removes copies that were declared lost during inventory or other circumstances not involving a patron. These have no associated fines.

- **Both.** Removes all lost copies, no matter how they were lost.

⚠ Since lost copies are often found and returned, we recommend waiting at least a year to remove them. Use the **Copies Lost** selection to ensure only those lost a year ago or longer are removed.

Use(s)

Run this utility to clean out old records if you're approaching your item limit.

Selections

Selections | Options

Remove lost copies for:

Copies at Site	AMS – Adams Middle School ▼
Copies with a Policy of	Any Policy ▼
Copies from	Copy Location ▼ From Through
Copies in Call Number Range	From Through
Copies Lost	From MM/DD/YYYY 📅 Through MM/DD/YYYY 📅 ▼
Copies in Barcode Range	From Through
Copies with Barcodes	

☑ **Show Additional Selections**   **Create Saved Utility**   **Run**

Copies Lost: Select copies by date range to ensure that only copies lost a long time ago are removed.

Options

Selections | Options

Declared Lost From	○ Patron	☑ Remove T
	○ Inventory	☐ Remove T
	● Both	

Declared Lost From: Choose which type(s) of lost copies t

Remove Titles with No Copies: When checked, this optio records with no other copies once the lost copies are remov

Remove Temporary Items: When checked, this option als that fit the rest of the Selections and Options.