

# Copies Utilities

## Operations

### Utilities

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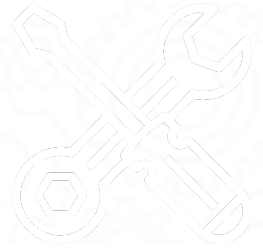
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Operations > Utilities > Copies

- [Add Copy Notes](#)
- [Change Copy Call Numbers](#)
- [Change Copy Condition](#)
- [Change Copy Location](#)
- [Change Copy Policy](#)
- [Change Copy Shelving](#)
- [Change Copy Site](#)
- [Change Funding Source](#)
- [Change Purchase Cost](#)
- [Change Replacement Cost](#)
- [Change Vendor](#)
- [Check Out](#)
- [Declare Checked Out Copies Lost](#)
- [Declare Missing Copies Discarded](#)
- [Declare Missing Copies Lost](#)
- [Reassign Union Site Copies](#)
- [Remove Archived Copies](#)
- [Remove Copies](#)
- [Remove Copy History](#)
- [Remove Copy Notes](#)
- [Remove Discarded Copies](#)
- [Remove Lost Copies](#)

## 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

18

Through MM/DD/YYYY

18

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 removes the chosen type and completely replaces them with what's in the

[Back to Top](#)

## 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

SelectionsOptions

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

13

Through MM/DD/YYYY

13

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

SelectionsOptions

Change Call #

☒ No Change

☐ Add prefix

☐ Remove prefix

☐ Replace prefix

☐ Match Copy to Title Call Number

Add

Remove

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** field to the end of the call number. If adding a prefix results in exceeding the 50 character limit, that call number will be skipped.

**Remove prefix:** Removes the text entered into the **Remove** field from the beginning of the call number. Additional spaces are removed as well if there are any.

**Replace prefix:** Replaces the existing call number entered into the **Replace** field with the new call number entered into the **with** field. The **Replace** field must be at least the same length as the **with** field. If replacing a prefix with a shorter prefix, that call number will be skipped.

**Match Copy to Title Call Number:** Changes selected copy call number to match the title call number.



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

### 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 ( / ) from the call number.

[Back to Top](#)

## Change Copy Condition

### Change Copy Condition

Changes the [condition](#) of selected copies



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

### Selections Options

Change the condition to the value specified under the Options tab for:

Copies at Site

Copies with a Status of

Copies with a Condition of

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

## Options

### Selections Options

Change Condition to

Change Condition to: Specify the new condition you would

[Back to Top](#)

# Change Copy Location

## Change Copy Location

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

SelectionsOptions

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

Copies at SiteAMS – Adams Middle School

Copies with a Status ofAny

Copies with a Policy ofAny Policy

Copies fromCopy LocationFromThrough

Copies with a Medium ofAny Medium

Copies in Call Number RangeFromThrough

Copies addedFrom MM/DD/YYYYThrough MM/DD/YYYY

Copies from Title

Copies in Barcode RangeFromThrough

Copies with Barcodes

Show Additional SelectionsCreate Saved UtilityRun

Options

SelectionsOptions

Change Copy Location to

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

[Back to Top](#)

## Change Copy Policy

### Change Copy Policy



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

Copies with a Status of

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

## Options

### Selections Options

☐ Match copy to its title policy

☒ Change Policy to

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

**Change Policy to:** Specify the new policy you would like to set.

[Back to Top](#)

## Change Copy Shelving

### Change Copy Shelving

Changes the [shelving](#) (852\_c MARC tag) of selected copies



"Copy Shelving" is a localization term that can be altered in [Terminology Preferences](#).



## Selections

### Selections

### Options

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

Copies at Site

Copies with a Status of

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

## Options

### Selections

### Options

Change Copy Shelving to

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

[Back to Top](#)

## Change Copy Site

### Change Copy Site

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

Options

Selections

Options

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

Copies at Site

Copies with a Status of

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

Selections

Options

New Site

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

[Back to Top](#)

## Change Funding Source

### Change Funding Source



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

Selections

Options

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

Copies at Site

Copies with a Status of

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

Selections

Options

Change Funding Source to

**Change Funding Source to:** Specify the new funding source for the copies to have.

[Back to Top](#)

# Change Purchase Cost

## Change Purchase Cost



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

13

Through MM/DD/YYYY

13

Copies from Title

Copies in Barcode Range

From

Through

Copies with Barcodes

✓ Show Additional Selections

Create Saved Utility

Run

Options

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



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.

## Selections

### Selections Options

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

Copies at Site

Copies with a Status of

Copies with  From  Through

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

## Options

### Selections Options

- ☒ Change Replacement Cost to
- ☐ Change Replacement Cost By [ ] \$
- ☐ Change Replacement Cost By [ ] %
- ☐ Match to Purchase Cost

[Back to Top](#)

## Change Vendor

### Change Vendor

Changes the [vendor](#) of selected copies

## Selections

### Selections Options

Change the vendor to the value specified under the Options tab for:

Copies at Site

Copies with a Status of

Copies with a Policy of

Copies from  From  Through

Copies with a Medium 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

## Options

### Selections Options

Change Vendor to

**Change Vendor to:** Specify the new vendor you would like

[Back to Top](#)

# 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

SelectionsOptions

Check out selected copies to the patron specified under the Options tab. Check out:

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 last used between

From MM/DD/YYYY

Through MM/DD/YYYY

Copies Last Inventoried Between

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

SelectionsOptions

Check out to patron barcode

Check out to

Lost

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 would like to check out selected copies.

[Back to Top](#)

# 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

SelectionsOptions

☒ Charge Lost Fees & Overdue Fines

☐ Charge Lost Fees Only

[Back to Top](#)

## 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.

[Back to Top](#)

# 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 **Invent**  
**ory Start Date**

### Selections

Selections

This utility will declare as lost all selected copies with an available status that were not inventoried since the specified start date.

Copies at Site

Inventory Start Date  

Copies with a Policy of

Copies from  From  Through

Copies with a Medium of

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.

 Unknown macro: 'multiexcerpt-include-macro'

[Back to Top](#)

# 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

SelectionsOptions

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 addedFrom MM/DD/YYYY18Through MM/DD/YYYY18▼

Create Saved UtilityRun

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

## Options

SelectionsOptions

New SiteAMS

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

[Back to Top](#)

## 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.



Selections

SelectionsOptions

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

13

Through MM/DD/YYYY

13

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

SelectionsOptions

✓ Remove Titles with No Copies

Remove Titles with No Copies:

When checked, this option removes records with no other copies once the archived copies are removed.

[Back to Top](#)

# Remove Copies

## Remove 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.

## Selections

SelectionsOptions

Remove copy records 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

SelectionsOptions

☒ Remove Titles with No Copies

Checked Out Copies
☒ Declare Lost
☐ Remove
☐ Keep

**Remove Titles with No Copies:** When checked, this option removes records with no other copies once the selected copies are removed.

**Checked Out Copies:** Choose what to do with copies that are checked out.

[Back to Top](#)

# 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.



Copy Stats
(20554) Bard of Avon : the story of William Shakespeare

Barcode: 20554
Copy Number: 1
Checkout Count: 5
Days in Circulation: 3
Date of Last Use: Jan 22, 2020 1:03 PM
Checked Out by: Library Use
Reservations Pending: 1
Last Modified: Jan 22, 2020 1:03 PM

Previous checkouts

|      |                 |                       |
|------|-----------------|-----------------------|
| 2134 | Haley Bowling   | Jan 22, 2020-1:03 PM  |
| 1    | Lost Copies     | Jan 22, 2020-1:03 PM  |
| 2134 | Haley Bowling   | Jan 22, 2020-1:02 PM  |
| 2079 | Jacob Bush      | Jan 22, 2020-12:56 PM |
| 2068 | Danielle Benton | Jan 22, 2020-12:55 PM |

OK

Selections

Selections

Remove copy checkout history for:

Copies at Site

AMS – Adams Middle School

Copies with a Status of

Any

Copies with a Policy of

Any Policy

Copies from

Copied 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

[Back to Top](#)

## 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.

Selections

Selections

Options

Remove all notes of the type 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

Copied 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

Note Type

☒ Copy Note
☐ Alert Note

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

[Back to Top](#)

# 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

SelectionsOptions

Remove discarded copies for:

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

Options

SelectionsOptions

✓ Remove Titles with No Copies

**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 removes records with no other copies once the discarded copies are

[Back to Top](#)

# 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 

13

 Through MM/DD/YYYY 

13

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

Inventory

Both

✓

 Remove T

Remove T

**Declared Lost From:** Choose which type(s) of lost copies to remove.

**Remove Titles with No Copies:** When checked, this option removes records with no other copies once the lost copies are removed.

**Remove Temporary Items:** When checked, this option also removes temporary items that fit the rest of the Selections and Options.

[Back to Top](#)