Searching and Editing Items

1: Discover item

Depending on the circulation task, staff may search for items in My Library Holdings, All WorldCat, or temporary items.

To search items held by your library:

- Click Discover Items
- Select My Library Holdings
- Search for an item by barcode
- Or, basic, expert, or advanced search
- Filter by facets

To search items in All WorldCat:

- Click Discover Items
- Select All WorldCat
- Choose Title, Author, ISBN, ISSN, OCLC Number
- Or, enter an expert search (e.g. mc:jazz AND au:Puente)
- Or, select Advanced Search

To search temporary items:

- Click Discover Items
- Select Temporary Items
- Choose Title or Author
2: Edit item details

- Select an item by clicking on the title from the search results
- Copies screen displays
  a) **Copies** bolded represents Copies display screen
  b) Click **View/Edit**

```
The purple balloon (F00309665) Add Item

<table>
<thead>
<tr>
<th>Branch</th>
<th>Shelving Location</th>
<th>Call Number</th>
<th>Barcode #</th>
<th>Enumeration</th>
<th>Chronology</th>
<th>Item Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Branch</td>
<td>East-Stacks</td>
<td>P27.R1014 Pur 2007</td>
<td>57487</td>
<td>In Processing</td>
<td>View/Edit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Main Branch</td>
<td>Main-Stacks</td>
<td>P27.R1014 Pur 2007</td>
<td>476457745</td>
<td>In Processing</td>
<td>View/Edit</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

- Edit Details screen displays
  a) **Details** bolded represents Item Details display screen
  b) Click **Edit Item**

```
The purple balloon (F00309665) Item Details

Status: In Processing
Holding Location: Main Branch
Shelving Locations: Permanent Previous Temporary

Call Number: P27.R1014 Pur 2007
Copy Number: 2
Receipt Status: Received and complete or ceased
Barcode: 476457745
Use Restrictions
Cost(s): $13.82
Note(s): 

[Edit Item]
```

- Modify the appropriate information such as:
  o Shelving location if the item is moving to a new location (e.g. Reserves)
  o Barcode if the barcode is damaged and needs to be replaced
  o Staff notes (staff note starting with “!” indicates an alert)
- Click **Save**

**Simulation:**

- Exception: Discover item and edit item details:
Managing Item Statistics and Statuses

3: View item statistics

From the Item Details display:

- Click Statistics
- Review Statistics associated with the item and current status:
  - Current status of item
  - Circulation counts
  - Inventory count and last date inventoried
  - Who/when last issued to
  - Issued and due dates, renewals
  - Overdue fines
  - Circulation rule
  - Reminders sent

4: Inventory Check In

- Click Check In
- Select Inventory for Check In Mode
- Scan or type barcode of item(s) to inventory
- Review Item Statistics for updated inventory count and date

5: Mark item missing

- Click Discover Items
- Select My Library Holdings
- Search for an item by barcode, basic, expert, or advanced search
- Select an item by clicking on the title
- Click Report Missing
- Confirm it is the correct item
• Click **Report Missing**
• Status is updated to **Missing** (can no longer Place Hold, Create Schedule, or Report Missing - it already is missing)
6: Update shelving location for multiple items (My LHRs)

- Click Discover Items
- Choose My LHRs
- Choose Barcode
- Copy/paste or scan in the barcodes to be updated
- Click Search

From the returned results:

1. Filter by Branch
2. Check items to update
3. Click Update

Select either Permanent or Temporary Shelving Location to modify

NOTE: While Temporary Shelving Location, if present, will be used to determine circulation policy and does appear as location in both WorldCat Local and WorldCat Discovery, temporary shelving location (876 $1) is not indexed in the “b8:” index. Only permanent shelving location (852 $a,b,c) is indexed in b8: index. If you want to search using the b8: index, consider using permanent shelving location even when temporarily assigning location.

- Click Update
7: Create Temporary item

- Click **Discover Items**
- Scan or enter barcode to be assigned to temporary item
- Enter additional required fields:
  - Title
  - Format
  - Holding Location
  - Shelving Location
- Click **Create Item**
- Edit additional information from the Temporary Item Details screen

Remember, Format, Holding Location, and Shelving location will be used to determine circulation rule applied when the temporary item is checked out.

NOTE: Temporary items can also be created from the Patron Checkout screen. Enter the new barcode from this screen and an option to automatically checkout item or place hold on item for the patron can be chosen.
8: Add Monograph

- Click **Discover Items**
  1. Select **All WorldCat**, search for an item
  2. Review results, hover over “i” for additional information on the bibliographic record
  3. Copy the Call Number (will be pasted into the item record)

- Click the bibliographic record’s title link

- Add Item
• On Add New Monographic Item screen, enter:
  1. Holding Location and Shelving Location
  2. Call Number
  3. Receipt Status and Barcode

• Click Add Monographic Item

**Simulation:**

• Managing course reserves in circulation:
Bound-With

9: Create a container for bound-with items

- Click **Discover Items**
- Scan a new (unused) barcode in the Enter Barcode search box
- Select Item Type – **Container for Bound Items**

![Create Item](image)

- Enter Title, Format, Holding Location, Shelving Location
- Click **Create Item**

10: Add items to the container

- From Item Details of the container, click **Add Item**
- Enter search criteria or barcode of the first item to be added to the container
- From the results list, select the title to be added to the container. Items associated with the title are displayed.
- Choose the appropriate item to be added and click **Add Item**
- Add more items to the container, as needed

**NOTE:** The holding location and shelving location of the items in the container must match those of the container for consistency in application of the circulation rule.

- Checkout must be done with the container barcode; checkout of items within the container result in an error which is misleading

![Checkout Error](image)

- Attempt to check in, causes a different error message

![Check In](image)
Delete item (Withdraw)

11: Delete an item

- Click Discover Items
- Select My Library Holdings
- Search for an item by barcode; or basic, expert, or advanced search
- From the Item Details screen, Delete

![Image of Item Details]

- Confirm Delete

![Image of Delete Item]

- Status changes to Withdrawn; item record is no longer associated with a WorldCat bibliographic record and is treated as a temporary item until it is permanently purged

![Image of Item Status]
From the Online Help for Circulation Configuration

- Items deleted from WMS will not display to the public, but will be saved by the system.
- Until the item is purged from the system, staff will be able to retrieve the item by barcode in WMS.
- The system-wide job to purge deleted items runs every Sunday. Deleted items will be retained until the job runs.
- The system retains old barcodes until the deleted items are purged.
- A deleted item’s status is Withdrawn.
- A deleted barcode may not be able to be reused until the item has been purged.

It is recommended to retain deleted items for a minimum of two weeks. Enter 0 to purge deleted items the next time the system-wide job runs.

**Reports**

For additional information on reports that can assist in item management, see the WorldShare Reports help at [https://help.oclc.org/Library_Management/WorldShare_Reports](https://help.oclc.org/Library_Management/WorldShare_Reports).