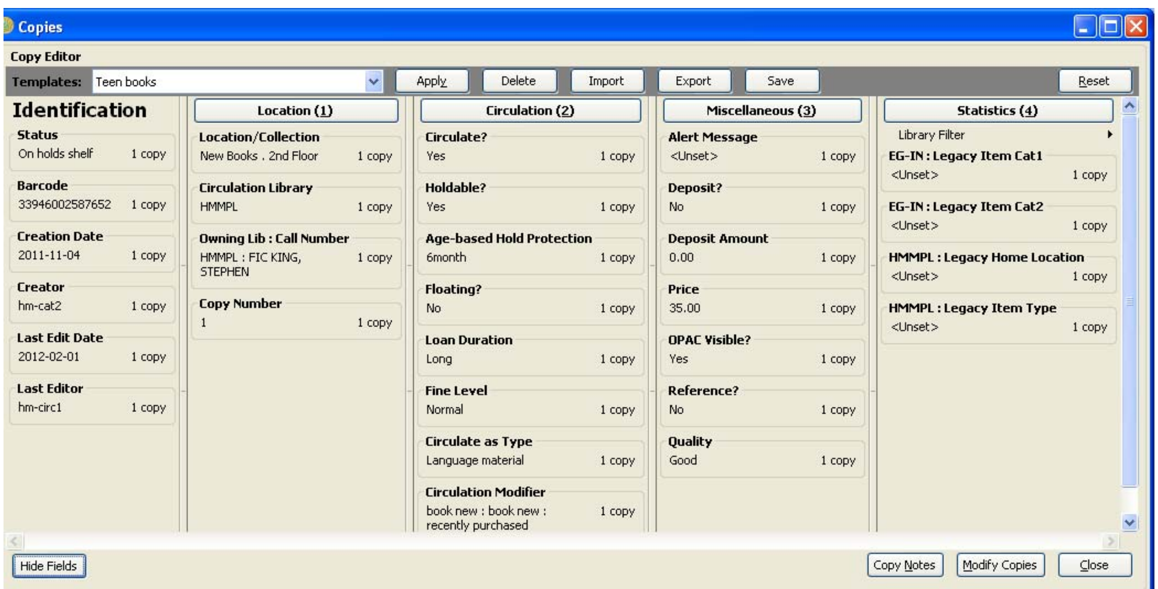
Chapter 7 -- Using the Copy Editor: Changes and Copy Notes

Using the Copy Editor to Make Changes

This chapter contains basic information about using the copy editor to make individual changes. For more detailed information about each of the fields in the Copy Editor, see ***Chapter 6 – Item Templates***.

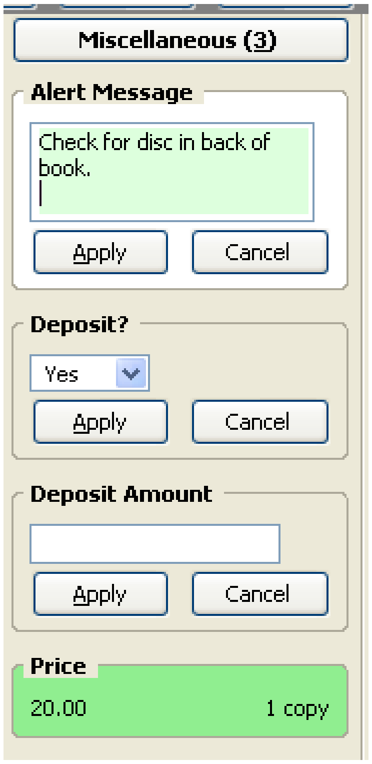
From the Holdings Maintenance view of the record you wish to change, highlight the item line and right-click or click on **Actions for Selected Rows (Alt +F**). Choose **Edit Items (Alt + E)** in the drop down window. If an item line is not highlighted, Edit Items will not be clickable.

The **Copy Editor** will open:



TIP: *You can also access the copy editor from the Item Status screen by right-clicking or clicking on either of the drop-down menus and selecting **Edit Item Attributes.***

If you wish to make changes to the item record, or change the status of the item, you can change it from this screen.



To activate a field you wish to edit, click on that field. You will then be able to edit the information in the field, either with a drop down list or a text box. The field will also have buttons labeled Apply and Cancel.

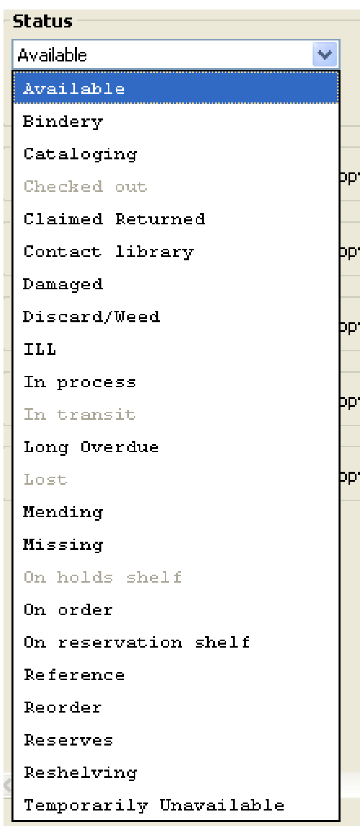
Most active fields will have a drop down list, as seen in the Deposit? field.

Alert Message has a text box. Any text that is desired can be entered into the Alert Message box. This will give an alert when the item is checked out or in.

NOTE: *Adding an Alert Message will prevent an item from being checked out via self-check.*

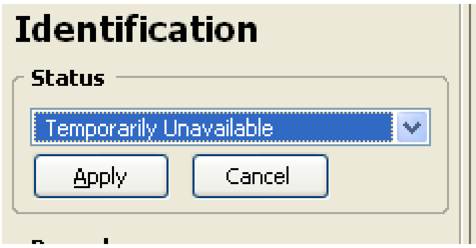
Only numbers can be entered into the Deposit Amount and Price fields. If you enter a whole number, .00 will be added automatically.

When the desired value is displayed in a field, click **Apply (Alt +A).**

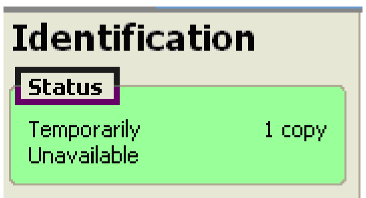


To edit a field with a drop down list, select the desired value from the list. For example, in the Status Box, the drop down menu appears as shown to the left.

When the value you have selected is displayed in the box, as shown below, click **Apply (Alt +A).**

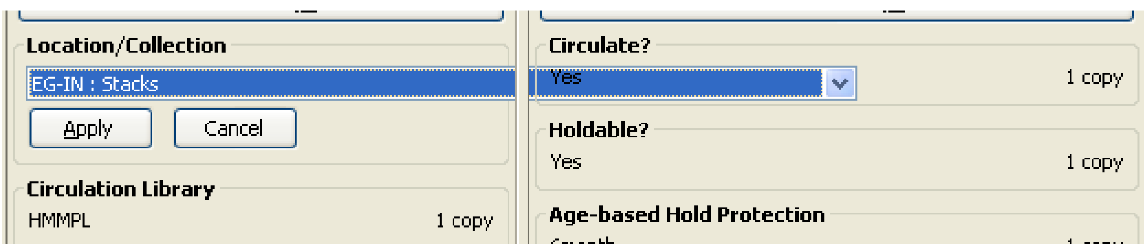


When you have applied the changes, the field will turn green to indicate that the field has been edited:

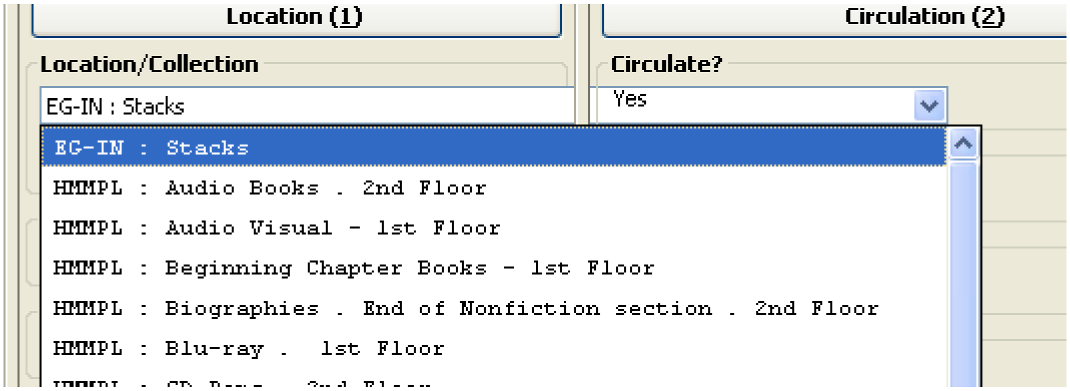


NOTE: *You must click Apply in each box for your changes to be saved. If you make your changes and leave the box active, your change will be lost even if you click the Modify Button.*

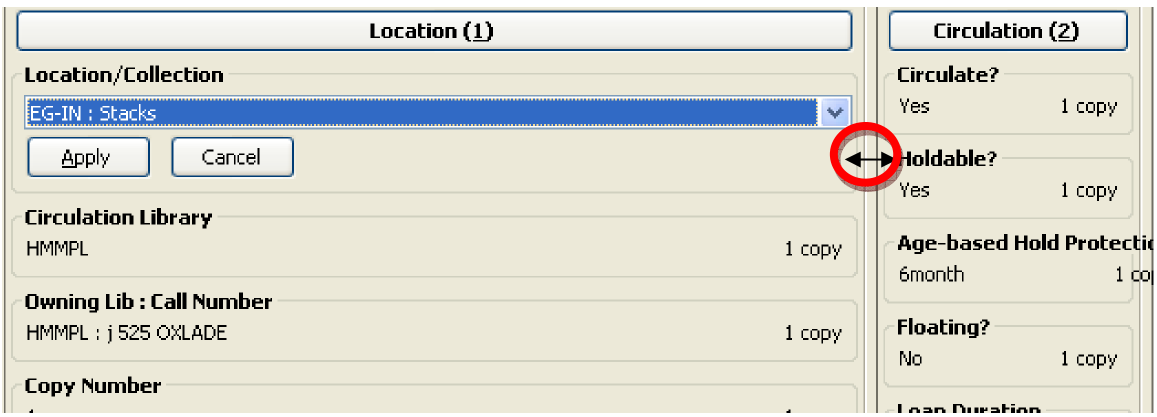
NOTE: There is a display issue with some of the drop down boxes. If some of the text is wider than the column, the box extends into next column when you open it, as seen below.



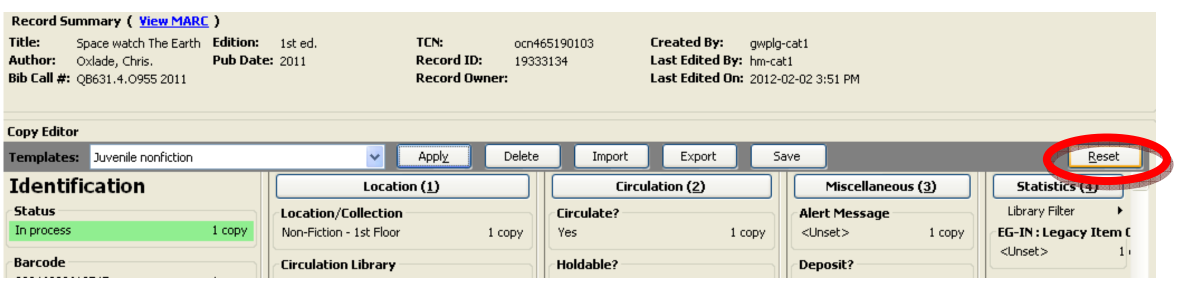
You can just click on the dropdown list within the correct column and proceed, rather than using the down arrow:



Or you can adjust the column size to fit the dropdown list by dragging on the lines between the columns:

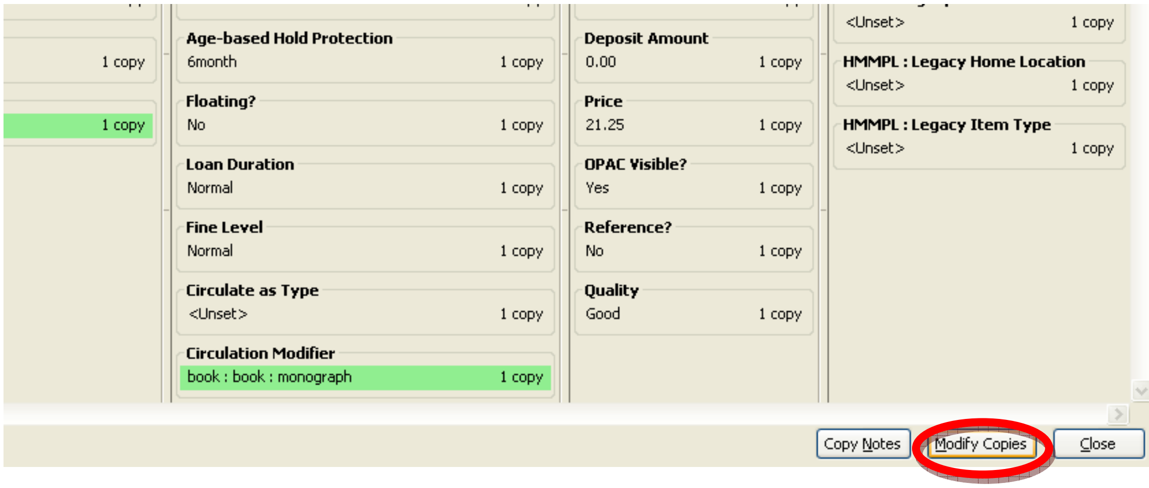


You can clear any changes you've made since opening the copy editor by clicking the **Reset** button.



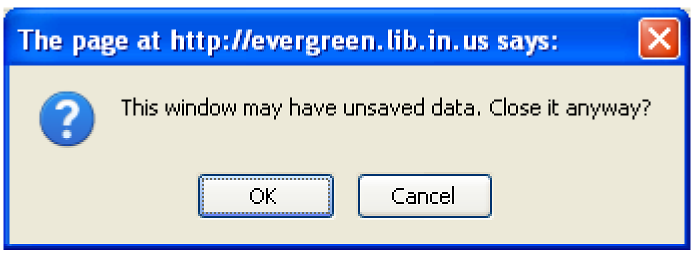
You can also apply and create templates from the Copy Editor. For further information, see **Chapter 6 – Item Templates.**

When you are finished making changes, you must click **Modify Copies (Alt + M).**



The Copy Editor will close, and your changes will be applied.

NOTE: *If you click the Close button or the red X to close the copy editor, your changes will not be saved, and you will get a notification box:*



If you want to save your changes, click Cancel to return to the Copy Editor. If you want to discard your changes, click OK and the Copy Editor will close.

TIP: *You can use the copy editor to make changes to more than one item at once. See **Using the Item Status Screen to Make Changes to Multiple Items** in **Chapter 15** and **Using Copy Bucket Manager Batch Function Tools in Chapter 17.***

Adding Copy Notes

You can also add copy notes from the Copy Editor. Copy Notes can be used to enter information that is specific to a single copy of an item, such as information about an item donation or an autographed copy.

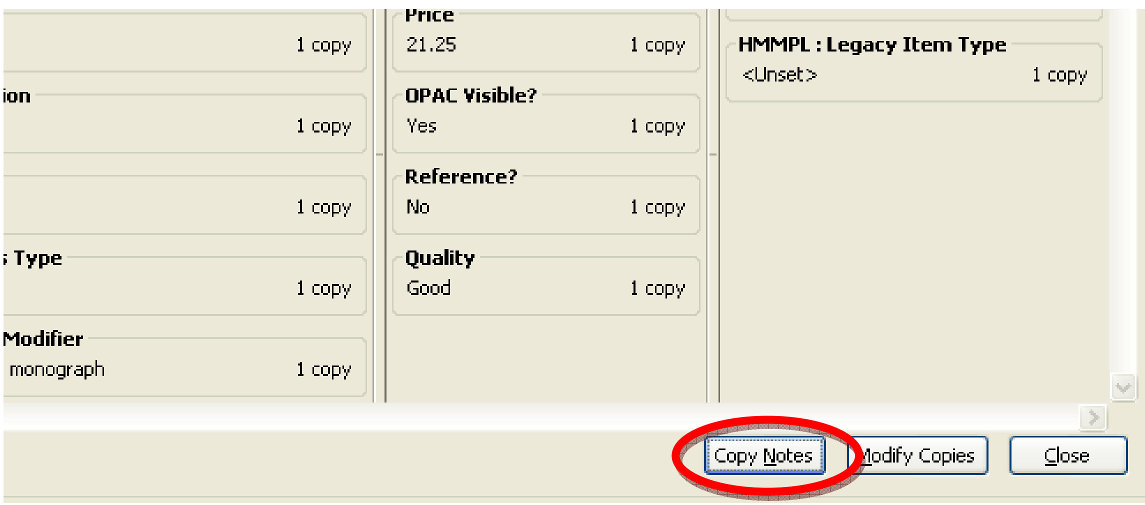
Copy Notes can be private, meaning it is visible only in the Staff Client, or public, meaning it can be seen from the OPAC.

You can add multiple copy notes to the same item.

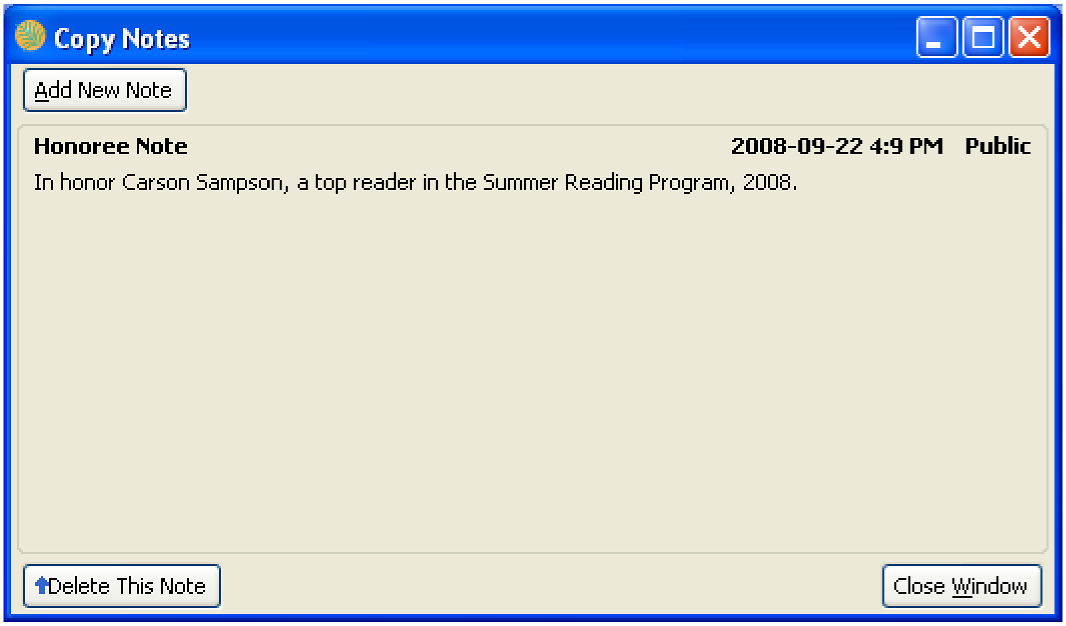
NOTE: *The Copy Notes button doesn't appear in the Copy Editor when adding new items or when editing more than one item at a time.*

TIP: *It can be useful to place a private copy note when you place an item on hold to check it for cataloging purposes, so that when the hold gets filled (sometimes weeks or even months later) you will be able to quickly determine why you placed the hold.*

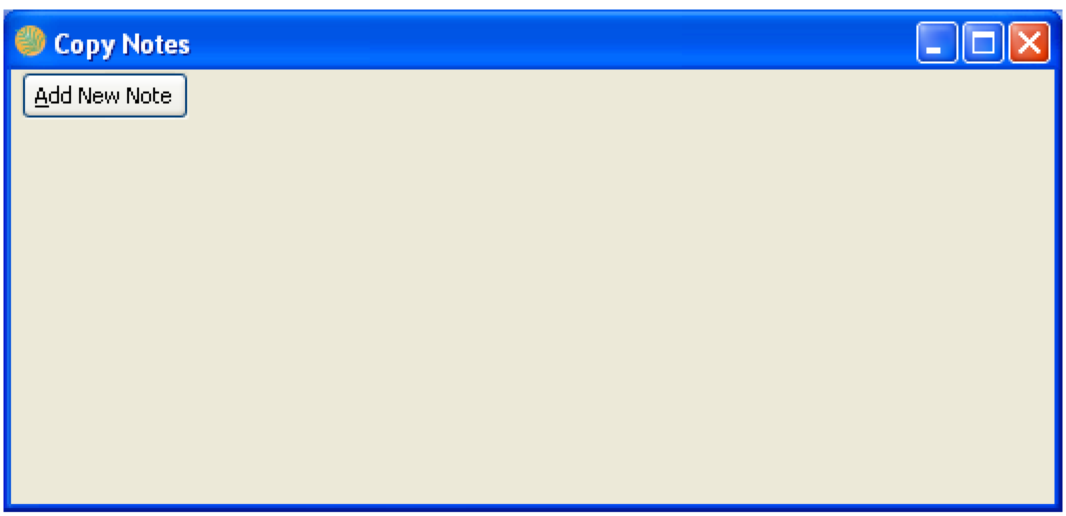
Click on **Copy Notes (Alt + N)** button, circled below:



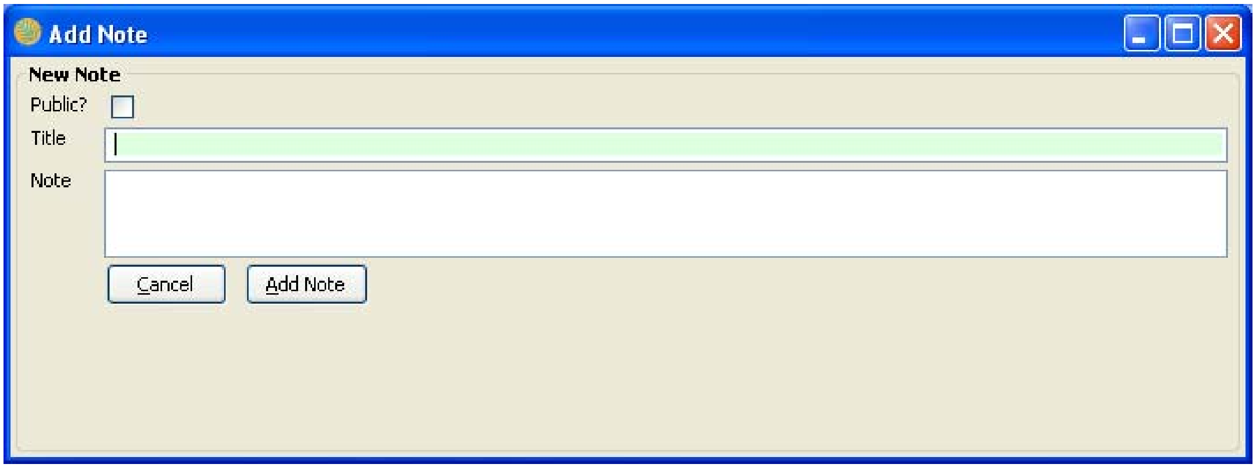
If a copy note had previously been applied to this item, it would display now, like so:



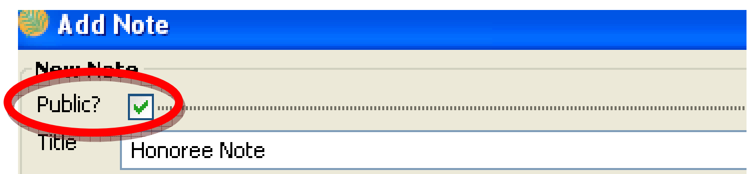
If the item has no notes, the box will be blank. To add a copy note, click on **Add New Note** (**Alt + A).**



A new box will open where you can enter your copy note. You can enter information into either or both the **Title** and **Note** boxes.

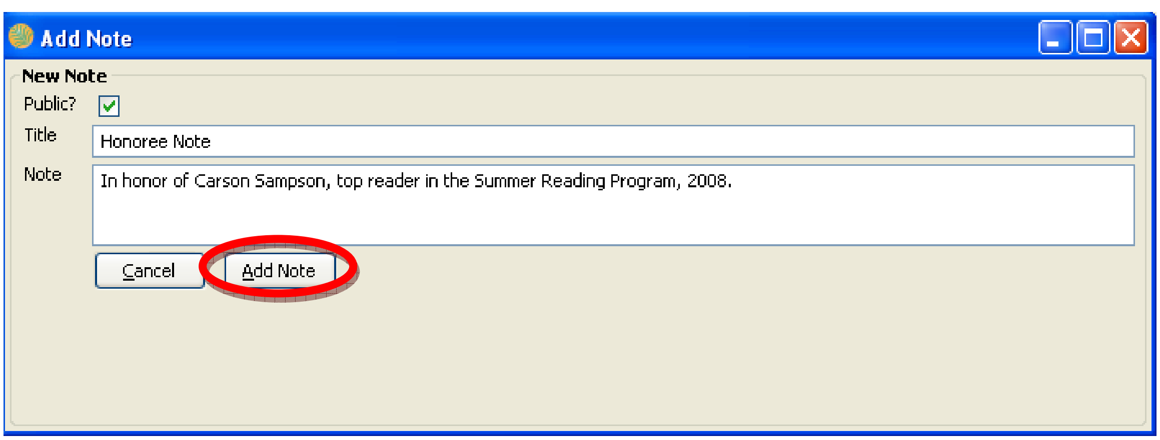


In previous versions of Evergreen, you could make the Copy Note visible from the OPAC by adding a checkmark by clicking the **Public?** box.



This feature is currently unavailable, but should return in future versions, so if you would like the note to be OPAC visible in the future, check the box.

After you have entered your note, Click **Add Note** (**Alt + A).**

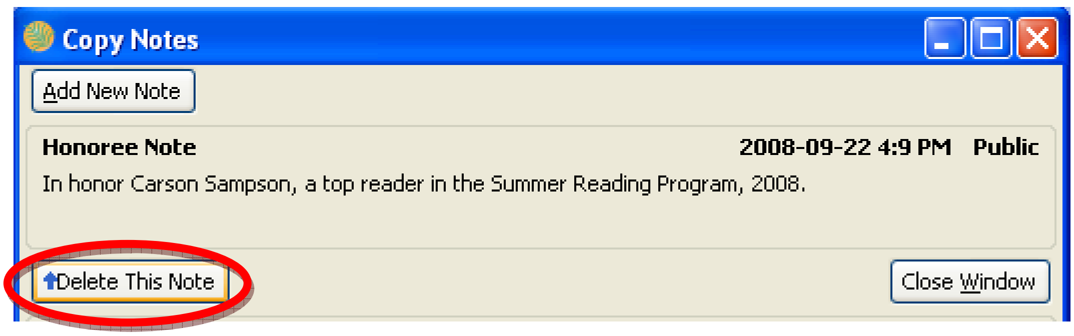


NOTE: *Copy notes are not currently searchable.*

NOTE: *You cannot edit a note you have created. If you wish to change the note, you must delete it and re-enter it.*

Deleting Copy Notes

Open the copy note from the Copy Editor, as described on page 7.6. Click the **Delete this Note** button.



A dialog box will open asking you to confirm that you wish to delete the note. Click **Yes (Alt +Y).**

A dialog box will confirm that the note was deleted. Click **OK** or press **Enter.**

Viewing Copy Notes in the OPAC

In previous versions of Evergreen, it was possible to view public Copy Notes from the OPAC. This option is currently unavailable, but should be restored in a future upgrade.