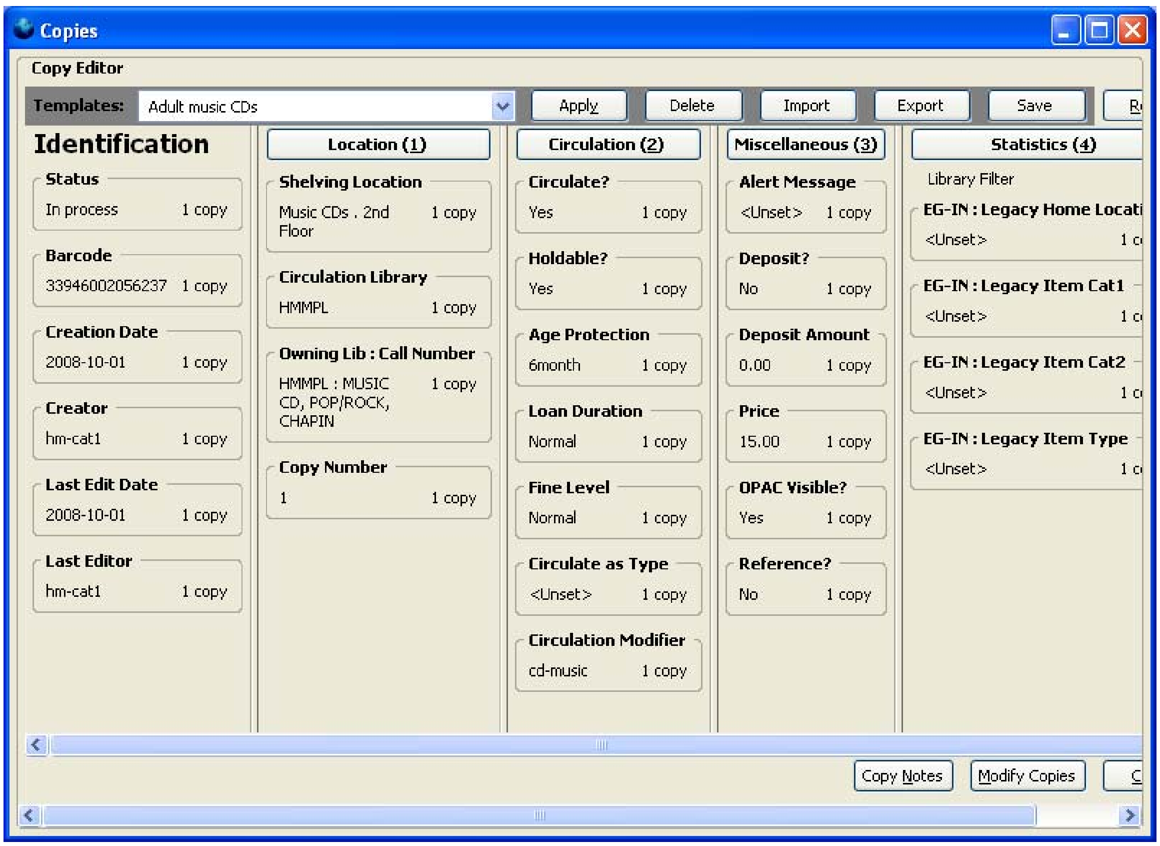
Chapter 7 -- Using the Copy Editor: Changes and Copy Notes

Using the Copy Editor to Make Changes.

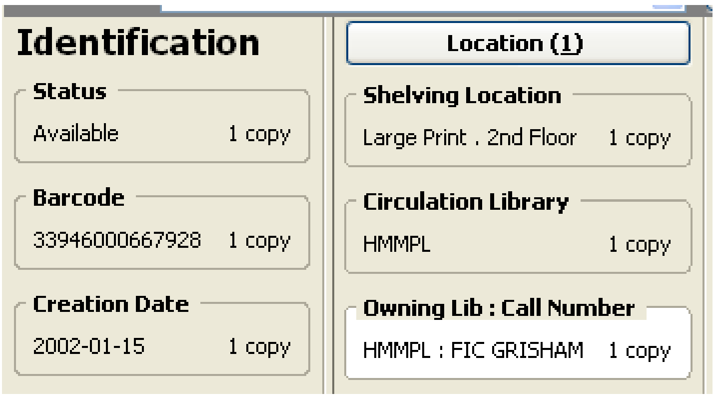
From the Holdings Maintenance view of the record you wish to change, click on **Actions for Selected Rows (Alt +A)**. You will need to highlight the item line to use the Copy Editor. Click on **Edit Item Attributes (Alt +E)** in the drop down window. If an item line is not highlighted, Edit Item Attributes will not be clickable.

The **Copy Editor** screen displays:

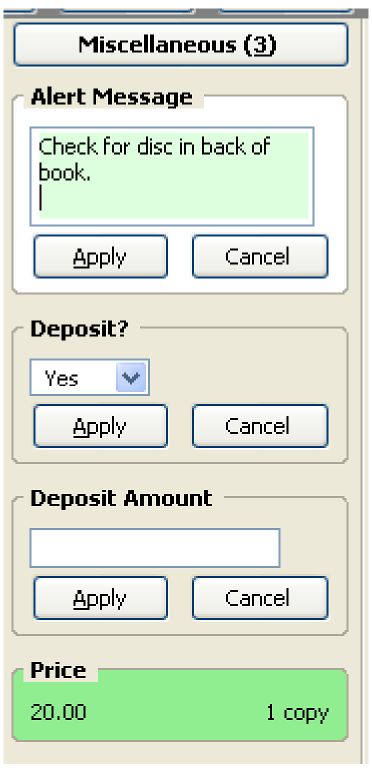


If wish to make changes to the item record, or change the status of the item, you can change it from this screen.

When you point your mouse over a field that can be edited, it turns white:



Note that the Owning Lib field turns white, but if you do not have permission to change the ownership of an item to a particular library, when you try to modify the copy, a dialog box will open requiring a user name and password with the proper permissions to be entered.



To activate a field you wish to edit, simply double 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.

You can activate more than one field at a time as shown at left. However, if you do so, when you click Apply or Cancel in one field, it applies or cancels all active fields.

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

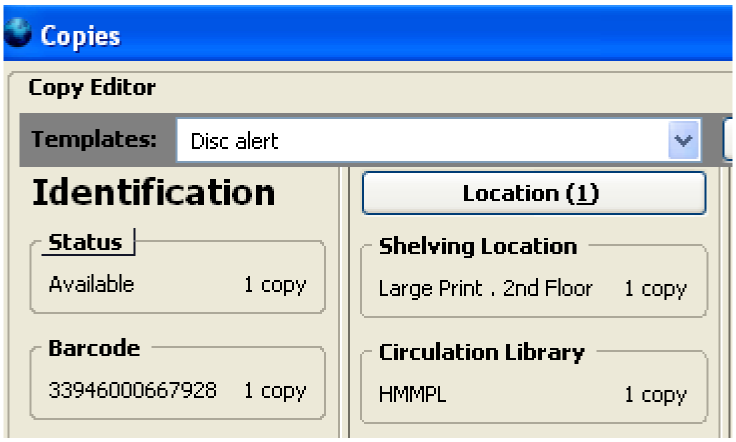
Price, Deposit Amount, and Alert Message all have text boxes. Only numbers can be entered into the Deposit Amount and Price fields. If you enter two digits, .00 will be added automatically. Any text that is desired can be entered into the Alert Message box. This will give an alert when the item is checked out or in.

When the desired value is displayed in a field, click **Apply (Alt + A).** The field will turn green, as seen in the Price field. If it does not turn green, your changes have not been applied.

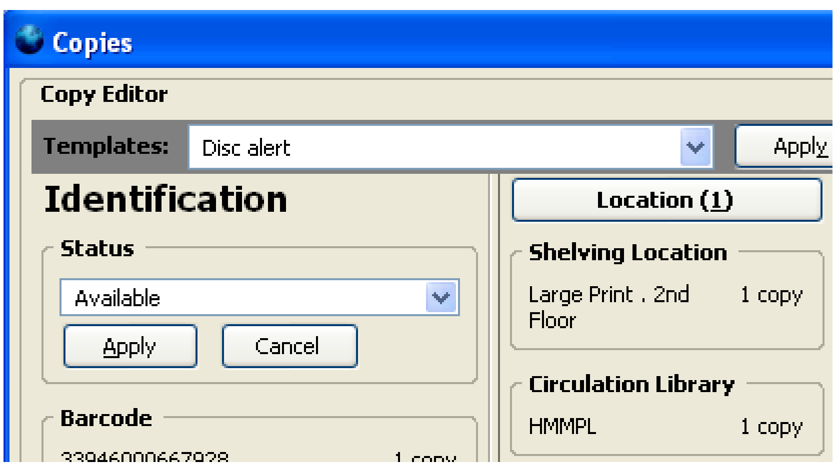
Another way to navigate between the various boxes in the Copy Editor is to press the **Tab** key to move from field to field. To jump from one column to another, press **Alt + 1, 2, 3, or 4.** You can also press **Tab + Shift** to move backward.

As you tab from field to field, the field name will be underlined as shown below. The fields which cannot be edited, all those in the Identification column other than Status, are automatically skipped over when using the Tab key to move between fields.

To activate a field when the name is underlined as shown, hit the **Enter** key.

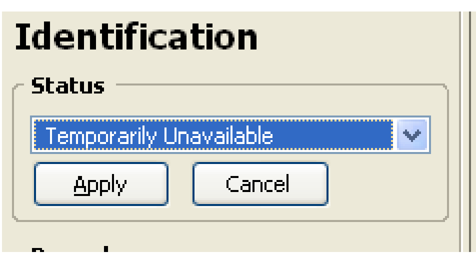


The field will become active, allowing you to edit it.

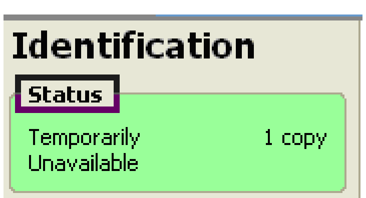


To edit a field with a drop down list, select the desired value from the list. Here we are editing the Status. This cannot be done when adding items, only using Edit Item Attributes. Note that some statuses are gray. These cannot be set by the cataloger.

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

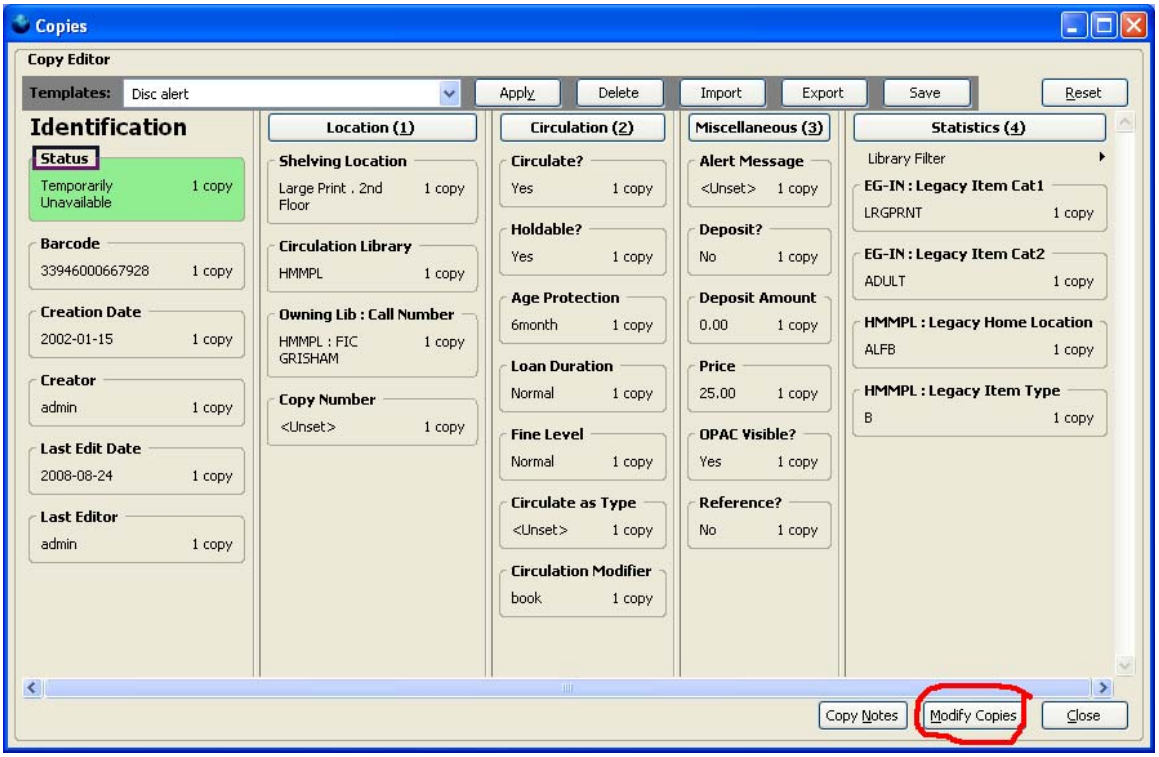


The field will turn green to indicate that the field has been edited.



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

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



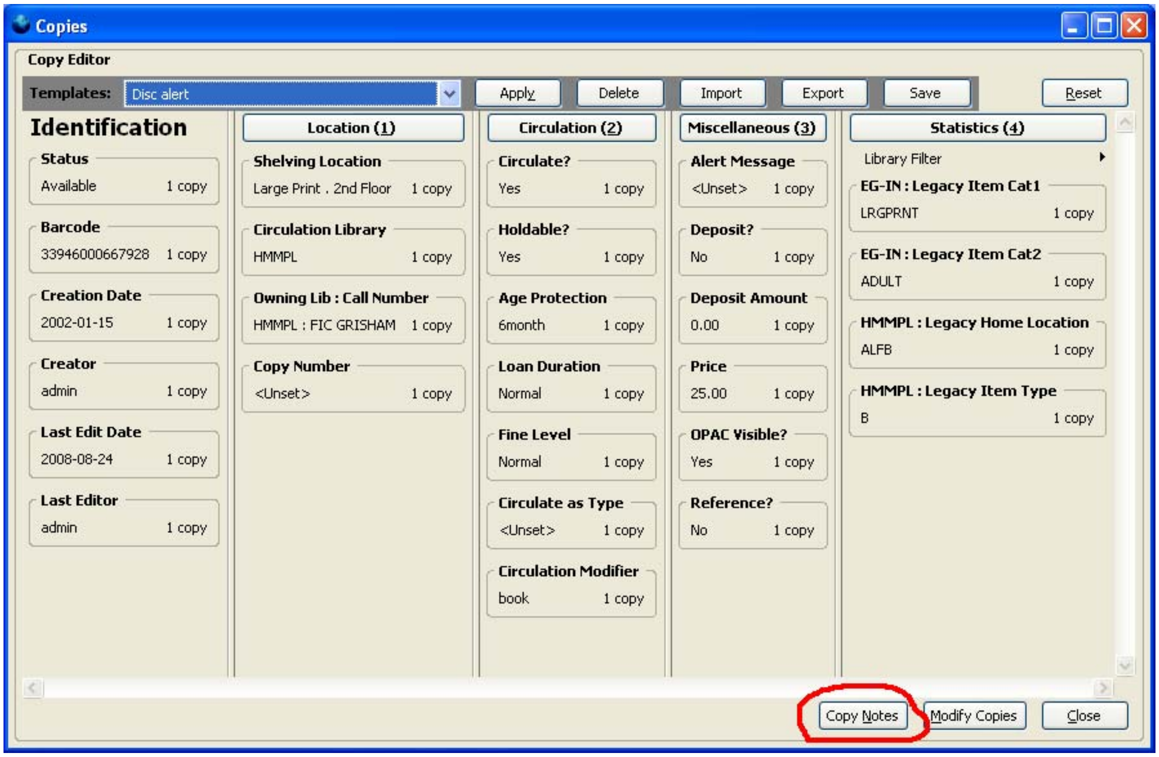
A message will appear that says **Items added/modified**.

Click on **OK** or press **Enter**.

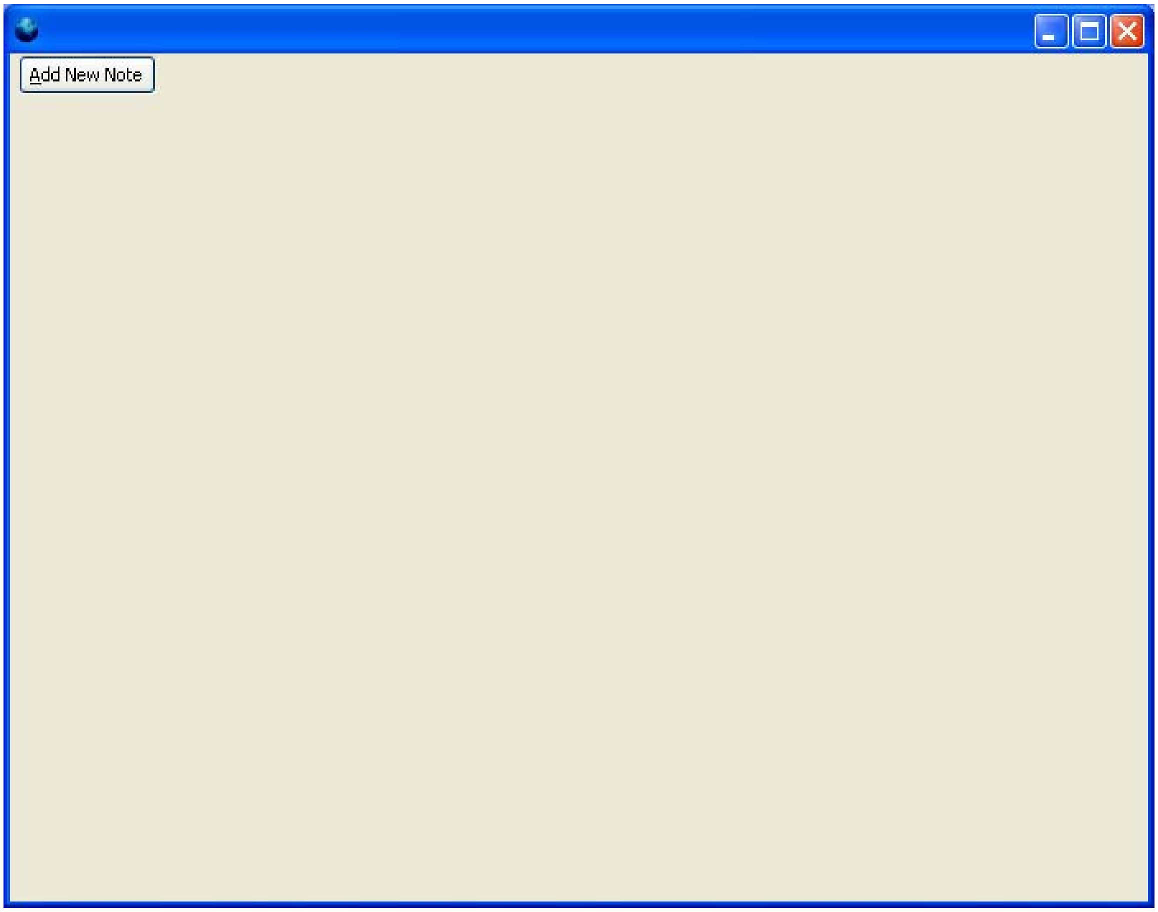
You will return to the holdings maintenance screen, and your changes will be applied.

Adding Copy Notes

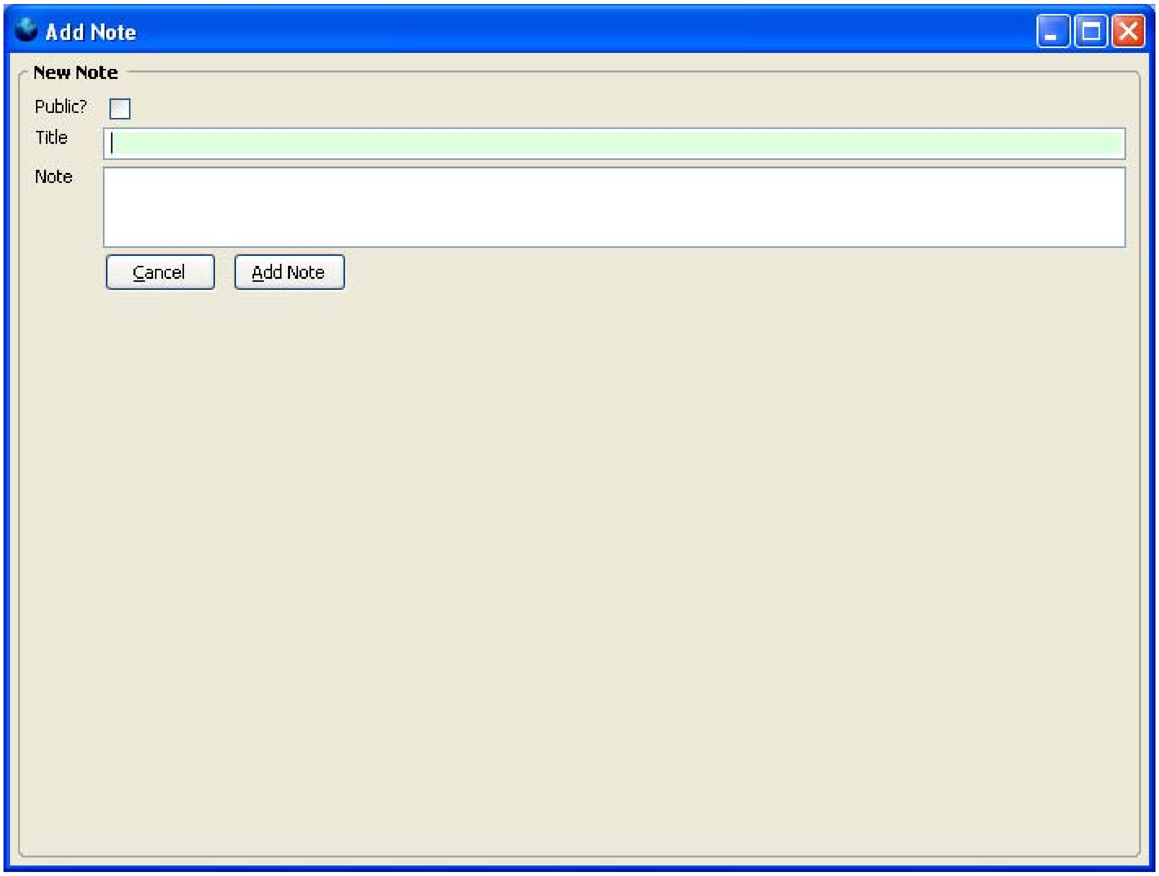
You can also add copy notes from the Copy Editor. This cannot be done when adding new copies. The Copy Notes button only appears in the Copy Editor when you Edit Item Attributes. Click on **Copy Notes (Alt + N)** button, circled below:



If you were working on an item that already had Copy Notes, your notes would display here. Since this is a new item with no notes, a box appears that allows you to add Copy Notes. Click on **Add New Note** or type **Alt + A.**



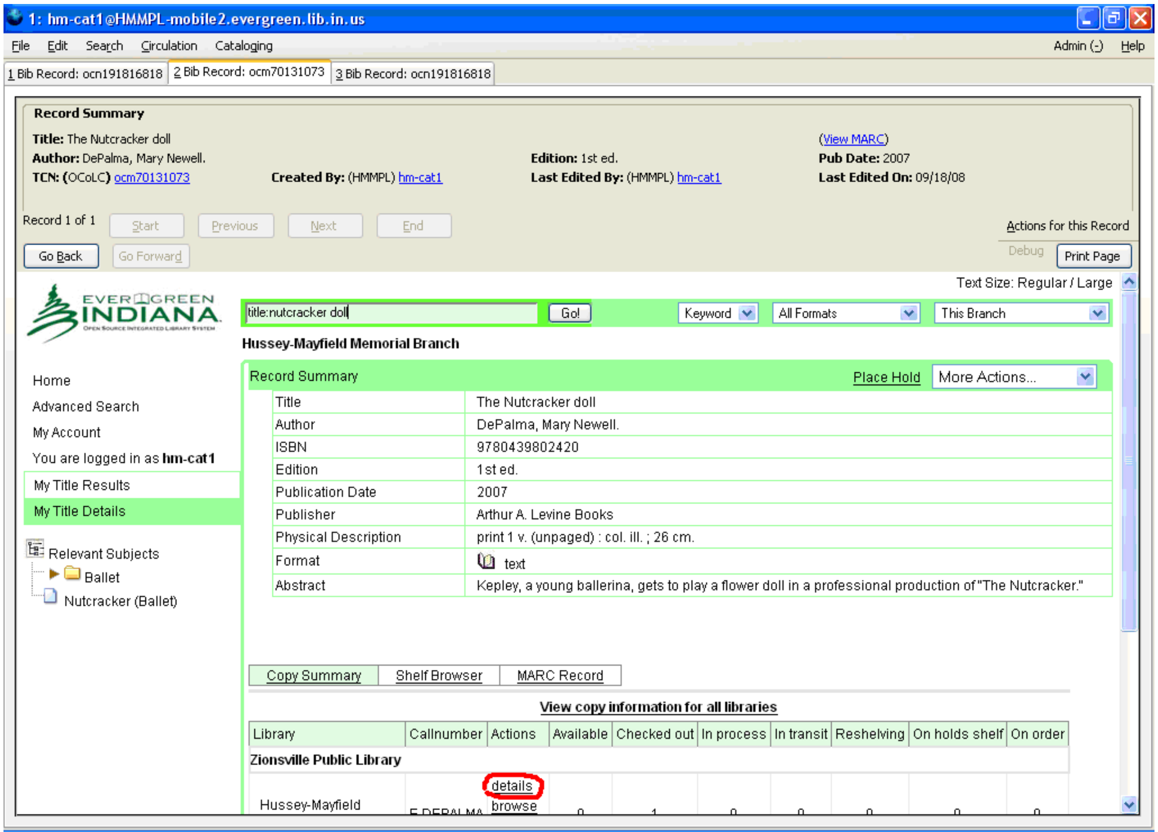
Click on **Add New Note** or type **Alt + A.** A new box will open where you can enter your copy note, such as "This item donated by the Merchant's Association, 2008." You can make the note public by putting a checkmark in the **Public?** box, to make it display in the OPAC. The default is for the note to be private, and it will display only in the staff client. You can also give the note a title, but it is not required.



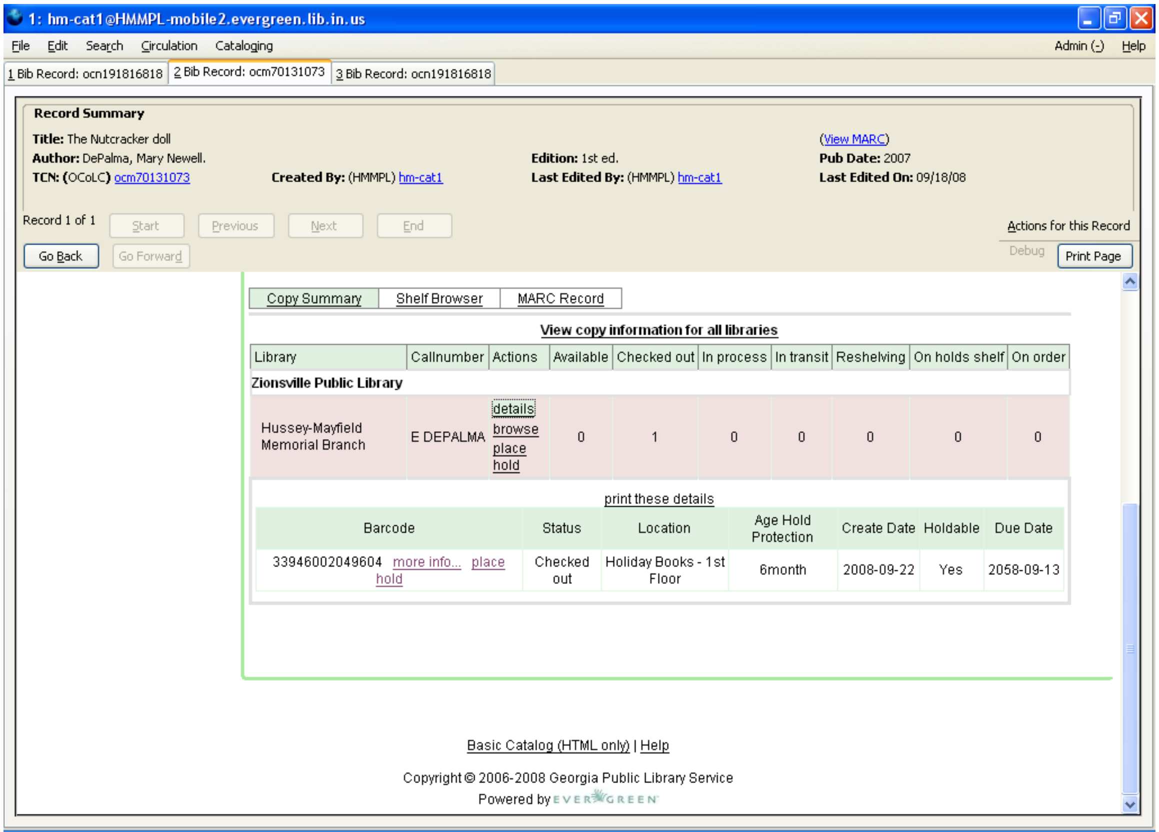
After you have entered your note, Click **Add Note**, or type **Alt + A.** These notes are not currently searchable. If you make the note public, it can be seen when that item is displayed in the OPAC.

Viewing Copy Notes in the OPAC

If you go to the record display in the OPAC, for example by searching by barcode, click on Details under the copy information.



The barcode information will appear:



Click on **more info** next to the barcode.

The copy note will display: