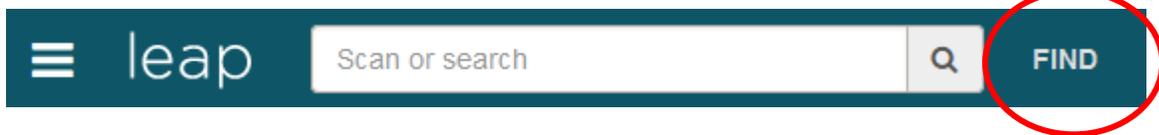


Bulk Changes

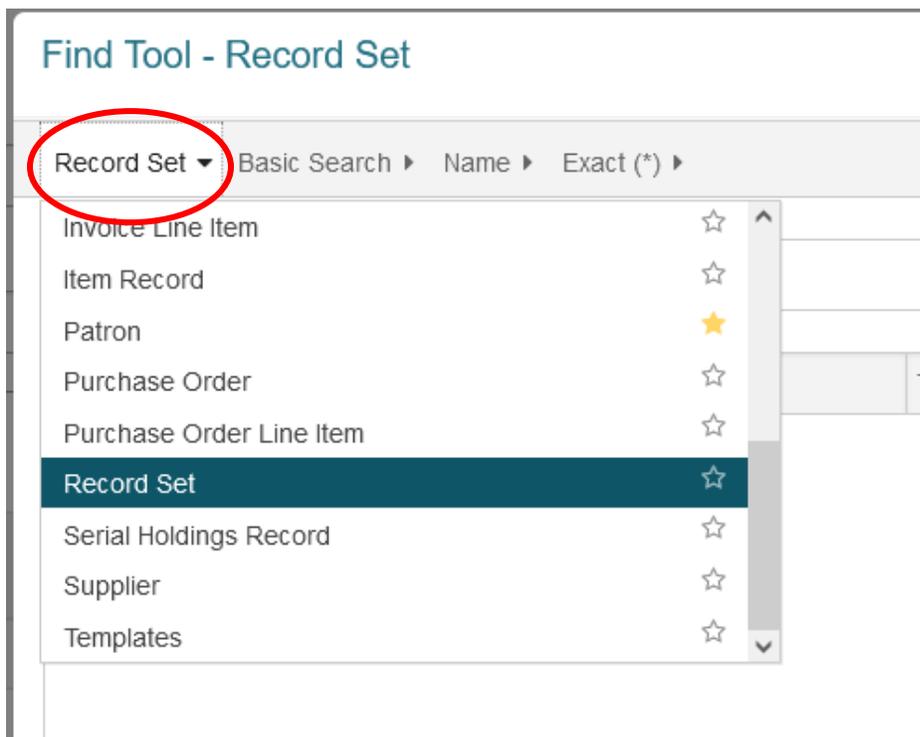
Bulk changes are used to bulk change every item record within a record set to the same status, information, or location depending on what gets selected for change. For example, during the weeding process, item records must have their circulation status changed to withdrawn. Changing the status within each individual item record is time consuming, and so a bulk change becomes incredibly useful in this case. An entire record set of weeded items can be bulk changed to Withdrawn in a few simple clicks, which will be demonstrated in the instructions below. Of note, specific permissions within Polaris are required to do this task. If you run into an issue with your permissions, submit a helpdesk ticket or contact your consultant to receive training and the required permissions. If you prefer that your consultant bulk changes your items, include the Record Set ID # and Name, asking your consultant to bulk change the items' status to withdrawn if the request is for weeded items.

How to Do a Bulk Change in LEAP

Click on the FIND button in the upper left corner of the browser.



In the Find Tool, select Record Set from the first list of search categories.



Type or paste in the name of the record set.

Find Tool - Record Set ×

Record Set ▶ Basic Search ▶ Name ▶ Exact (*) ▶

✕ ★ 🔍 ☰

Double click on the result to open the record set.

+	Name	Record Type	Owner	Total Records	Creation Date	Note
✓	Weeded Mags Feb 2023	Item Record	Irma Municipal ...	36	2023-03-03	

Within the record set, click Actions > Bulk Change.

ACTIONS ▼ **REFRESH**

- Bulk Change**
- Create Item Record Set
- Create Authority Record Set
- Export
- Delete
- Undelete
- Bulk Add to New PO
- Bulk Add to Existing PO

Within the Bulk Change screen, click on Circulation in lower half of the page.

Location **Circulation** Call Number Blocks and Notes Miscellaneous

Select Circulation Status > Withdrawn.

Circulation Status

(No change) ▾

- (No change)
- Bindery
- In
- Mending
- Missing
- Unavailable
- Withdrawn**

Once the changes have been made, Click Update Items on the upper right hand corner or the Bulk Change page.



Click Continue when the Summary of Changes window appears. A Report will download once the bulk change is completed, which will report on any errors, the number of items processed, and will give a summary of changes.

Summary of Changes

This bulk change process will attempt to change 36 item record(s).

Record set name:	Weeded Mags Feb 2023
Record set owner:	Irma Municipal Library
Bulk change report:	ItemBulkChangeReport_20230331141242.txt
Error record set name:	
Error record set owner:	

Circulation status: Withdrawn

Once made, these changes cannot automatically be undone.

CONTINUE CANCEL

Double check that all the items in your record set have changed to the status Withdrawn. Sometimes a few items are missed, and if that happens, then you simply double click on the item and change the circulation status to withdrawn within the item record. In the item record, click Details (this is the default view).

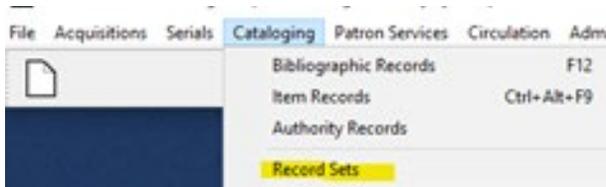


Then select Circulation Status > Withdrawn.

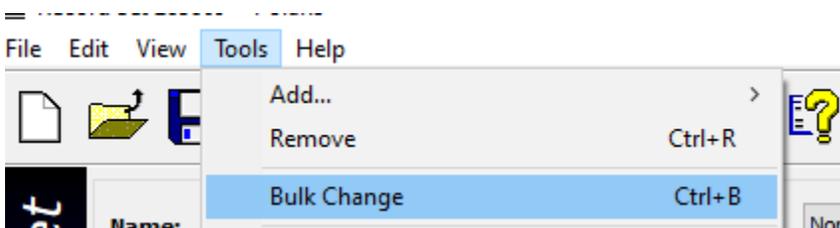
A screenshot of an item record form. The 'Circulation Status' dropdown menu is open, and 'Withdrawn' is selected, highlighted with a red circle. Other fields include Barcode (30800015021220), Owing Branch (Irma Municipal Library (br)), Bib Control Number (1485006), Collection (Periodical (PER)), Assigned Branch (Irma Municipal Library (AIRC)), Shelf Location (None), Price (\$5.00), and checkboxes for Non-circulating and Display in PAC.

How to Do a Bulk Change in Polaris

Click on cataloging and then select record set.



Type in the name of the record set you just created. Double click on the correct result. Then select tools and click on Bulk Change.



Make sure that circulation status is checked off and using the drop-down menu, select withdrawn. Click OK.

Item Record Bulk Change - Number of records: 2

Template: (None) Save Save As... Delete

Location Circulation Call Number Notes/Blocks Misc Report/Record Set

Circulation status: Withdrawn

Material type:

Loan period:

Fine code:

Statistical code:

Renewal limit:

Holdable:

Limit To

Pickup at:

Patrons from this library and branches:

Patrons from this branch only:

Preferred borrowers:

Non circulating: Do not float:

Loanable outside system:

OK Cancel Help

Double check that all the items in your record set have changed to the status Withdrawn. Sometimes a few items are missed, and if that happens, then you simply double click on the item and change the circulation status within the item record itself.

Save file.