

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:

The screenshot shows the 'Copies' window with the 'Copy Editor' tab active. The window title is 'Copies' and the tab title is 'Copy Editor'. The 'Templates' dropdown is set to 'Adult music CDs'. The interface is divided into several sections:

- Identification:** Status (In process, 1 copy), Barcode (33946002056237, 1 copy), Creation Date (2008-10-01, 1 copy), Creator (hm-cat1, 1 copy), Last Edit Date (2008-10-01, 1 copy), Last Editor (hm-cat1, 1 copy).
- Location (1):** Shelving Location (Music CDs . 2nd Floor, 1 copy), Circulation Library (HMMPL, 1 copy), Owning Lib : Call Number (HMMPL : MUSIC CD, POP/ROCK, CHAPIN, 1 copy), Copy Number (1, 1 copy).
- Circulation (2):** Circulate? (Yes, 1 copy), Holdable? (Yes, 1 copy), Age Protection (6month, 1 copy), Loan Duration (Normal, 1 copy), Fine Level (Normal, 1 copy), Circulate as Type (<Unset>, 1 copy), Circulation Modifier (cd-music, 1 copy).
- Miscellaneous (3):** Alert Message (<Unset>, 1 copy), Deposit? (No, 1 copy), Deposit Amount (0.00, 1 copy), Price (15.00, 1 copy), OPAC Visible? (Yes, 1 copy), Reference? (No, 1 copy).
- Statistics (4):** Library Filter (EG-IN : Legacy Home Locati, <Unset>, 1 copy), EG-IN : Legacy Item Cat1 (<Unset>, 1 copy), EG-IN : Legacy Item Cat2 (<Unset>, 1 copy), EG-IN : Legacy Item Type (<Unset>, 1 copy).

Buttons at the top include Apply, Delete, Import, Export, and Save. Buttons at the bottom include Copy Notes, Modify Copies, and a search icon.

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

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

Identification		Location (1)	
Status	Available 1 copy	Shelving Location	Large Print , 2nd Floor 1 copy
Barcode	33946000667928 1 copy	Circulation Library	HMMPL 1 copy
Creation Date	2002-01-15 1 copy	Owing Lib : Call Number	HMMPL : FIC GRISHAM 1 copy

Note that the Owing 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.

Miscellaneous (3)	
Alert Message	Check for disc in back of book. Apply Cancel
Deposit?	Yes [v] Apply Cancel
Deposit Amount	[] Apply Cancel
Price	20.00 1 copy

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.

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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 screenshot shows the 'Copies' window with the 'Copy Editor' tab. The 'Templates' dropdown is set to 'Disc alert'. The 'Identification' column is active, with the 'Status' field underlined. The 'Status' field contains 'Available' and '1 copy'. The 'Barcode' field contains '33946000667928' and '1 copy'. The 'Shelving Location' field contains 'Large Print . 2nd Floor' and '1 copy'. The 'Circulation Library' field contains 'HM MPL' and '1 copy'. The 'Location (1)' button is visible at the top of the right column.

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

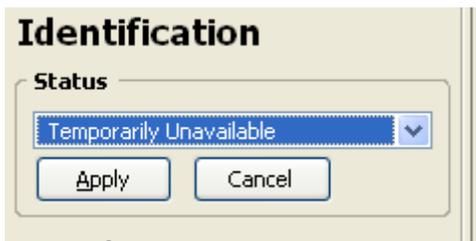
The screenshot shows the 'Copies' window with the 'Copy Editor' tab. The 'Templates' dropdown is set to 'Disc alert' and an 'Apply' button is visible. The 'Identification' column is active, with the 'Status' field underlined. The 'Status' field contains 'Available' and '1 copy'. A dialog box with 'Apply' and 'Cancel' buttons is open over the 'Status' field. The 'Barcode' field contains '33946000667928' and '1 copy'. The 'Shelving Location' field contains 'Large Print . 2nd Floor' and '1 copy'. The 'Circulation Library' field contains 'HM MPL' and '1 copy'. The 'Location (1)' button is visible at the top of the right column.

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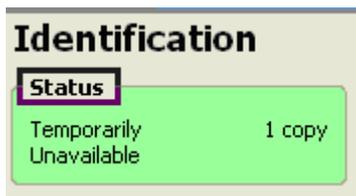
To edit a field with a drop down list, select the desired value from the list. Here we are editing the Status. This cannot be done when adding items, only using Edit Item Attributes. Note that some statuses are gray. These cannot be set by the cataloger.



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.

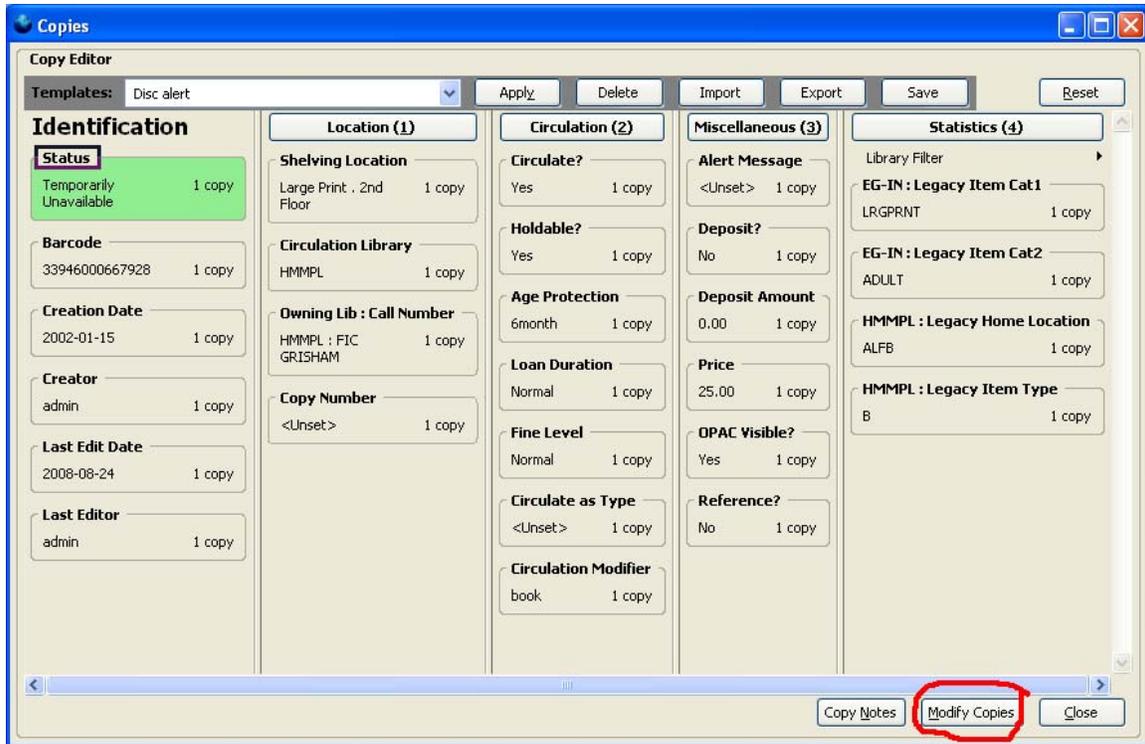


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You can also apply and create templates from the Copy Editor. For further information, see **Chapter 6 – Templates**.

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



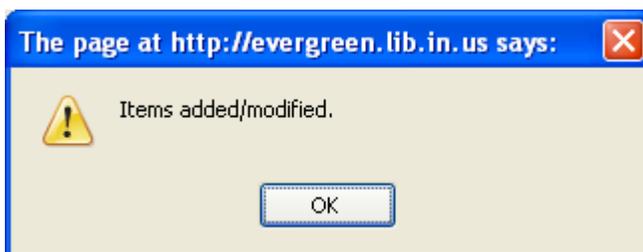
The screenshot shows the 'Copies' window with the 'Copy Editor' tab active. The window is divided into several sections:

- Templates:** A dropdown menu set to 'Disc alert' and buttons for 'Apply', 'Delete', 'Import', 'Export', 'Save', and 'Reset'.
- Identification:** Fields for Status (Temporarily Unavailable), Barcode (33946000667928), Creation Date (2002-01-15), Creator (admin), Last Edit Date (2008-08-24), and Last Editor (admin).
- Location (1):** Shelving Location (Large Print . 2nd Floor), Circulation Library (HMPL), and Owning Lib : Call Number (HMPL : FIC GRISHAM).
- Circulation (2):** Circulate? (Yes), Holdable? (Yes), Age Protection (6month), Loan Duration (Normal), Fine Level (Normal), Circulate as Type (<Unset>), and Circulation Modifier (book).
- Miscellaneous (3):** Alert Message (<Unset>), Deposit? (No), Deposit Amount (0.00), Price (25.00), OPAC Visible? (Yes), and Reference? (No).
- Statistics (4):** Library Filter (EG-IN : Legacy Item Cat1), EG-IN : Legacy Item Cat2 (ADULT), HMPL : Legacy Home Location (ALFB), and HMPL : Legacy Item Type (B).

At the bottom right, there are three buttons: 'Copy Notes', 'Modify Copies' (highlighted with a red circle), and 'Close'.

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:

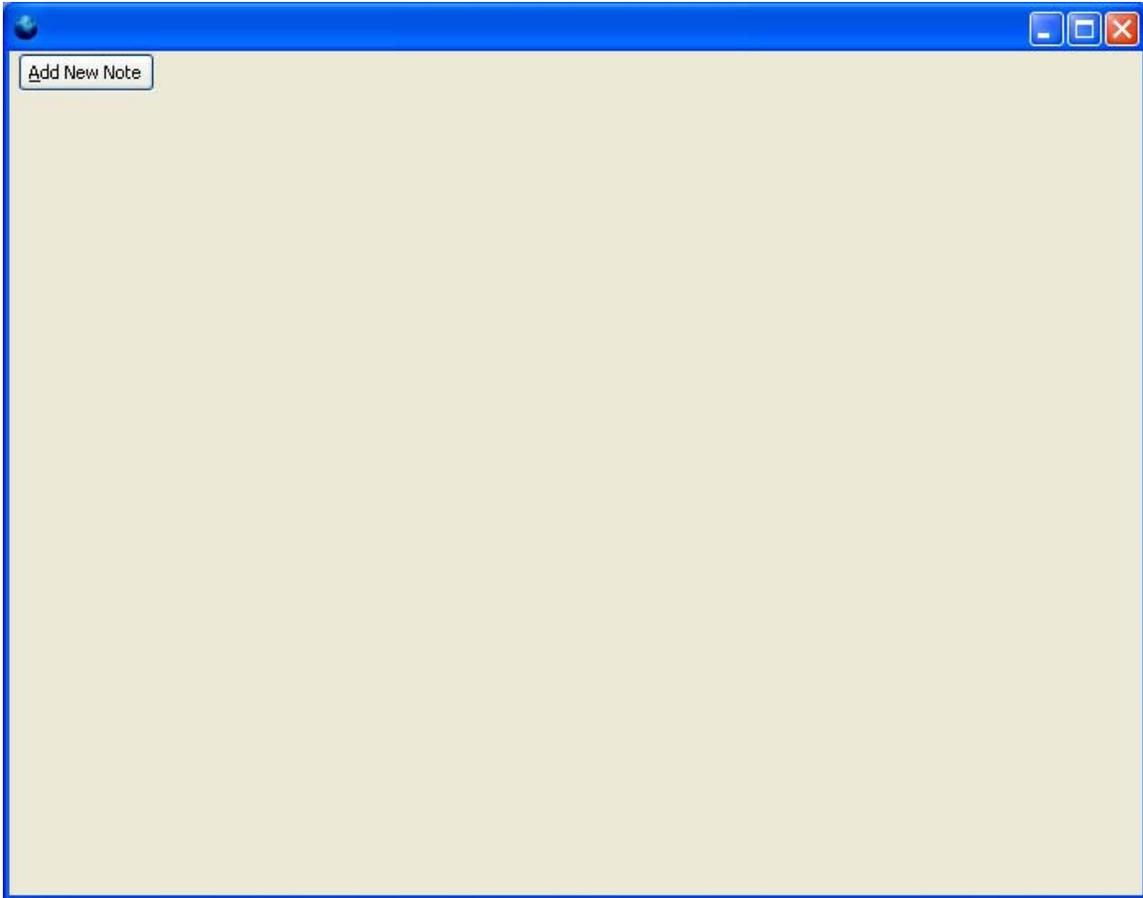
The screenshot shows the 'Copies' window with the 'Copy Editor' tab active. The interface is divided into several sections:

- Templates:** Disc alert (dropdown), Apply, Delete, Import, Export, Save, Reset (buttons)
- Identification:** Status (Available, 1 copy), Barcode (33946000667928, 1 copy), Creation Date (2002-01-15, 1 copy), Creator (admin, 1 copy), Last Edit Date (2008-08-24, 1 copy), Last Editor (admin, 1 copy)
- Location (1):** Shelving Location (Large Print . 2nd Floor, 1 copy), Circulation Library (HMMPL, 1 copy), Owning Lib : Call Number (HMMPL : FIC GRISHAM, 1 copy), Copy Number (<Unset>, 1 copy)
- Circulation (2):** Circulate? (Yes, 1 copy), Holdable? (Yes, 1 copy), Age Protection (6month, 1 copy), Loan Duration (Normal, 1 copy), Fine Level (Normal, 1 copy), Circulate as Type (<Unset>, 1 copy), Circulation Modifier (book, 1 copy)
- Miscellaneous (3):** Alert Message (<Unset>, 1 copy), Deposit? (No, 1 copy), Deposit Amount (0.00, 1 copy), Price (25.00, 1 copy), OPAC Visible? (Yes, 1 copy), Reference? (No, 1 copy)
- Statistics (4):** Library Filter (EG-IN : Legacy Item Cat1, LRGPRNT, 1 copy; EG-IN : Legacy Item Cat2, ADULT, 1 copy; HMMPL : Legacy Home Location, ALFB, 1 copy; HMMPL : Legacy Item Type, B, 1 copy)

At the bottom right, there are three buttons: 'Copy Notes' (circled in red), 'Modify Copies', and 'Close'.

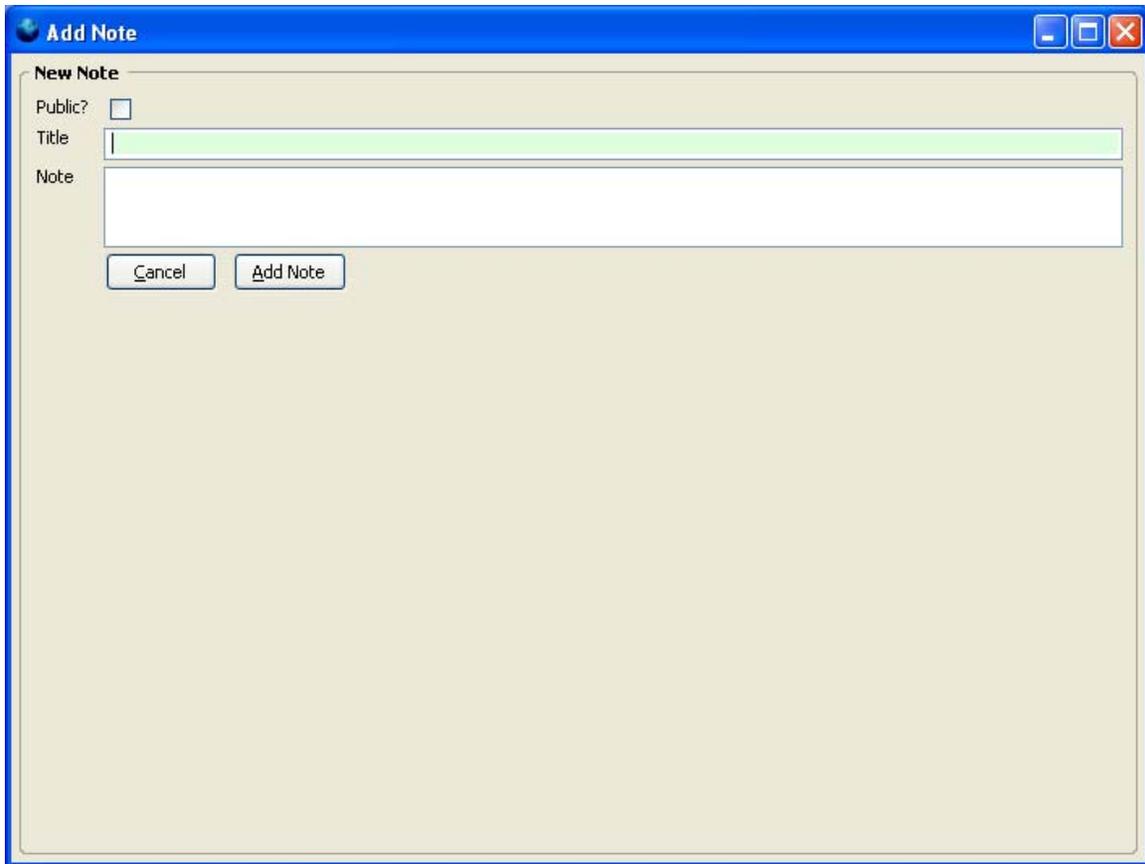
If you were working on an item that already had Copy Notes, your notes would display here. Since this is a new item with no notes, a box appears that allows you to add Copy Notes. Click on **Add New Note** or type **Alt + A**.

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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.

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The image shows a software dialog box titled "Add Note". The dialog has a blue title bar with the text "Add Note" and standard window controls (minimize, maximize, close). The main area is titled "New Note" and contains a "Public?" checkbox (unchecked), a "Title" text field (highlighted in light green), and a larger "Note" text area. At the bottom are "Cancel" and "Add Note" buttons.

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.

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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 screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The page title is "Record Summary" for the record "The Nutcracker doll" by DePalma, Mary Newell. The record is identified by OCoLC number ocn70131073. The user is logged in as hm-cat1. The record is the first of one.

The record summary includes the following details:

- Title: The Nutcracker doll
- Author: DePalma, Mary Newell.
- TCN: (OCoLC) ocn70131073
- Created By: (HMMPL) hm-cat1
- Edition: 1st ed.
- Last Edited By: (HMMPL) hm-cat1
- Pub Date: 2007
- Last Edited On: 09/18/08

The record is displayed for the Hussey-Mayfield Memorial Branch. The record summary table is as follows:

Field	Value
Title	The Nutcracker doll
Author	DePalma, Mary Newell.
ISBN	9780439802420
Edition	1st ed.
Publication Date	2007
Publisher	Arthur A. Levine Books
Physical Description	print 1 v. (unpaged) : col. ill. ; 26 cm.
Format	text
Abstract	Kepley, a young ballerina, gets to play a flower doll in a professional production of "The Nutcracker."

Below the record summary, there are tabs for "Copy Summary", "Shelf Browser", and "MARC Record". The "View copy information for all libraries" table is shown below:

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
Zionsville Public Library									
Hussey-Mayfield	DEPALMA	details browse	0	1	0	0	0	0	0

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The barcode information will appear:

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The page title is "1 Bib Record: ocn191816818 | 2 Bib Record: ocm70131073 | 3 Bib Record: ocn191816818". The main content area is titled "Record Summary" and contains the following information:

- Title:** The Nutcracker doll
- Author:** DePalma, Mary Newell.
- TCN:** (OCoLC) [ocm70131073](#)
- Created By:** (HMMPL) [hm-cat1](#)
- Edition:** 1st ed.
- Last Edited By:** (HMMPL) [hm-cat1](#)
- Pub Date:** 2007
- Last Edited On:** 09/18/08

Navigation buttons include "Record 1 of 1", "Start", "Previous", "Next", "End", "Go Back", and "Go Forward". There are also "Debug" and "Print Page" buttons.

Below the summary, there are tabs for "Copy Summary", "Shelf Browser", and "MARC Record". The "Copy Summary" tab is active, showing "View copy information for all libraries".

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
Zionsville Public Library									
Hussey-Mayfield Memorial Branch	E DEPALMA	details browse place hold	0	1	0	0	0	0	0

Below this table is a link "print these details".

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date	
33946002049604	more info... hold	Checked out	Holiday Books - 1st Floor	6month	2008-09-22	Yes	2058-09-13

At the bottom of the page, it says "Basic Catalog (HTML only) | Help" and "Copyright © 2006-2008 Georgia Public Library Service. Powered by EVERGREEN".

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

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The copy note will display:

The screenshot shows a web browser window with the URL `1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us`. The page title is "1: hm-cat1@HMMPL-mobile2.evergreen.lib.in.us". The browser menu includes "File", "Edit", "Search", "Circulation", "Cataloging", "Admin", and "Help".

Record Summary

Title: The Nutcracker doll [\(View MARC\)](#)
Author: DePalma, Mary Newell. **Pub Date:** 2007
TCN: (OCoLC) [ocm70131073](#) **Created By:** (HMMPL) [hm-cat1](#) **Last Edited By:** (HMMPL) [hm-cat1](#) **Last Edited On:** 09/18/08

Record 1 of 1

View copy information for all libraries

Library	Callnumber	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order
Zionsville Public Library									
Hussey-Mayfield Memorial Branch	E DEPALMA	details browse place hold	0	1	0	0	0	0	0

[print these details](#)

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date
33946002049604 less info place hold	Checked out	Holiday Books - 1st Floor	6month	2008-09-22	Yes	2058-09-13

Copy Note : Honoree Note : In honor Carson Sampson, a top reader in the Summer Reading Program, 2008.

Basic Catalog (HTML only) | [Help](#)
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