



Record Sets

Record sets are a great way to view and group a number of records.

To add a few items to a record set.

1. Perform a search using the find tool. This can be for item records, bibliographic records, or patron records. Check the box beside the search results and click the **add to record set** button.

The screenshot shows the 'Find Tool - Item Record' interface. At the top, there are navigation tabs: 'Item Record', 'Basic Search', 'Circulation status', and 'Exact'. Below the tabs is a search bar containing the text 'Unavailable'. To the right of the search bar are icons for navigation, a star, a funnel, a magnifying glass, and a menu. Below the search bar is a table with the following columns: Title, Assig..., Colle..., Mater..., Shelf ..., Call ..., V..., Status, Barcode, Last Activit..., R..., and Con... The table contains two rows of data, both with checked checkboxes in the first column. The first row is 'The Oxford picture d...' and the second row is 'Taking care of mom,...'. Below the table, there is a status bar that says 'Ready' and 'Filtered to 2 of 1,063 result(s)'. At the bottom of the interface, there is a 'Count Only' checkbox and three buttons: 'ADD TO RECORD SET', 'OPEN', and 'CANCEL'. The 'ADD TO RECORD SET' button is highlighted with a green box, and a dropdown menu is open below it, showing 'New' and 'Existing' options, also highlighted with a green box.

<input type="checkbox"/>	Title	Assig...	Colle...	Mater...	Shelf ...	Call ...	V...	Status	Barcode	Last Activit...	R...	Con...
<input checked="" type="checkbox"/>	The Oxford picture d...	Allianc...	Adult ...	Book		423.1 ...		Unavail...	31000037107458	3/16/2010	Fi...	304...
<input checked="" type="checkbox"/>	Taking care of mom,...	Allianc...	Adult ...	Book		306.8...		Unavail...	31000015898896	1/24/2007	Fi...	209...




2. Select **new record set** or **existing record set**.
 - a. **New** – you will be taken to a new record set workform. Your record set name should include your library code [ALAP-record set].

NOTE: ensure you change the record owner from your login to your library, that way the record set can be edited by any of your library's logins.

- b. **Existing**- you will be prompted to search for a record set by name. You can search with a * to view all record sets.

To add all results to record set.

1. Perform a search using the find tool. This can be for item records, bibliographic records, or patron records.

2. Select the bag icon  to open **Record Set Option**. Check the box to **send results to a new record set**. Your record set name should include your library code and the owner should be your library.
3. Click **Apply**
4. Once the send results option is set the bag icon will be green .
5. Then click the search button again .
6. You will receive a pop-up notice informing you the record set has been
7. created. Click **Yes**.

Record set test_20190423112836 has been created (224 records).
Do you wish to open it now?

YES

NO

Record Set Options

Send Results to a New Record Set

Name

Owner

hamendt ▼

Warning Size Threshold

2500

APPLY
CANCEL

New record set

Another way to create a record set and add items to it:

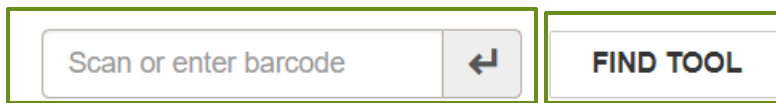
1. Click **Record Set** in the **New** drop-down menu. Then select the type of record set you are making: Authority, Bibliographic, Item, or Patron.
2. Name the record set using your library code, change the owner to your library rather than individual login.

New
▼

Patron Record

Record Set

3. You can then scan your items into the appropriate field or use the Find tool to perform a search for items.



View record sets

1. Perform a **record set search in the find tool** and click the result to open and view a record set. You can only open and edit record sets created by your library.

Find Tool - Record Set ×

