



# Library System Guide – Manage Collections

## Manage Collections

The screenshot shows the LRMS (Build 3.8.17) interface for managing collections. The window title is "LRMS(Build 3.8.17) : DEMO (User: lrms) (Server: local) - [Manage Collections]". The interface includes a menu bar with "File", "Action", "Previous Menu", and "Main Menu". The "Action" menu is open, showing "Add Collection" (Ctrl+Ins) and "Remove Collection" (Ctrl+D). The "Main Menu" is also visible, listing various collection types: MAIN COLLECTION, ALL, MOBILE DEVICES, E-BOOKS, LANGUAGE BOOKS, PROFESSIONAL COLLECTION, TEXTBOOKS, and VIDEO MEDIA. A central "Transfer" panel is highlighted, containing a "Transfer" button, a "TAGGED Only" option, and a "Set Selected Collection Options" section with checkboxes for "Show In OPAC", "Flag as Textbook / Equipment", and "Enforce Reading Level". A "Drop Down Menu" is also visible, listing the same collection types as the Main Menu. The interface is annotated with yellow arrows pointing to the "Add Collection" and "Remove Collection" options, the "Transfer" button, and the "Set Selected Collection Options" section.

**Action Tab:**

**Add Collection:**  
Select add a Collection and the program will open an Add Collection dialog add the collection name and click OK.

**Remove Collection:**  
See page 2 & 3

**Drop Down Menu:**  
This option provides for five primary functions.  
1. **Add or Remove a Collection**  
Add a new collection or Remove a collection

**Center Section:**

- "Transfer or Transfer only"  
Provides the ability to Transfer All collection items between collections, or Only Tagged Records.
- "Show in OPAC"  
Creates the ability to assign a collection or collections to appear within the Library Catalog (OPAC).
- "Flag as Textbook / Equipment":  
The ability to flag any collection as a Textbook or Equipment collection to avoid appearing in Open Circulation until requested.
- "Enforce Reading Levels"  
If the Library desires to use Reading Levels that are included within the MARC record and wants to enforce the use of Reading Levels during Circulation

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Add as many collections as needed, highlight each collection to assign any applicable restrictions and to designate collections you want displayed in the Online Catalog (OPAC).



## Manage Collections

### I want to rename a Collection:

How to Change a Collection Name, for integrity reasons collection names cannot be altered once it has been created. To Change a collection a new collection will be required; choose the “Action” tab to add the new collection and its new name.

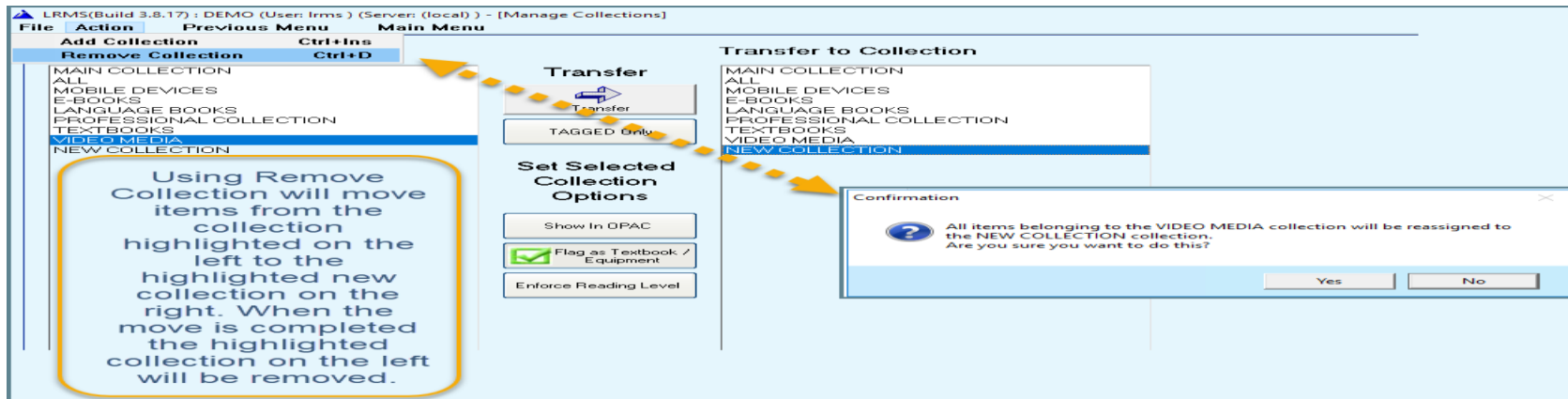
The screenshot displays the LRMS (Build 3.8.17) interface for managing collections. The main window has a menu bar with 'File', 'Action', 'Previous Menu', and 'Main Menu'. The 'Action' menu is open, showing 'Add Collection' (Ctrl+Ins) and 'Remove Collection' (Ctrl+D). The 'Add Collection' option is highlighted with a yellow arrow. The main area is divided into two panes. The left pane lists collections: MAIN COLLECTION, ALL, MOBILE DEVICES, E-BOOKS, LANGUAGE BOOKS, PROFESSIONAL COLLECTION, TEXTBOOKS, and VIDEO MEDIA. The right pane is titled 'Transfer to Collection' and contains a 'Transfer' button with a right-pointing arrow, a 'TAGGED Only' button, and a 'Set Selected Collection Options' section with three checkboxes: 'Show In OPAC' (checked), 'Flag as Textbook / Equipment', and 'Enforce Reading Level'. A yellow dashed arrow points from the 'Transfer' button to the 'Add Collection' dialog box. The dialog box is titled 'Add Collection' and has a close button (X). It contains a text input field labeled 'New collection name:' with the text 'NEW COLLECTION' entered. There are 'OK' and 'Cancel' buttons at the bottom right of the dialog.



## Transferring Collection Records or Changing collections names:

Once the new collection has been added, the NEW COLLECTION will appear in the Selected Collection and the Transfer to Collection columns.

- Highlight the collection within the Selected Collection (see example Video Media which its contents will be moved to the New Collection)
- Then highlight the New Collection within the Transfer to Collection column. (This is where the Video Media example will be moved to).
- Next choose the “Action” Tab and select “Remove Collection” this action will do two things; it will transfer the records of the Highlighted Selected Collection and will (move) reassign All Items in this collection to the highlighted New Collection in the Transfer to Collection column. The program will then provide a confirmation dialog box explaining this and is asking “Yes” to proceed or choosing “No” to cancel.
- Choosing “Yes” will move all record items to the New Collection and when finished with the moving of Data will Remove (delete) the collection that was highlighted in the Selected Collection column.



How to Remove an empty collection:

- Select the Collection to be removed from within the “Selected Collection” Column.
  - G4 does not assess whether the collection contains records or is void of Records, as a precaution the program requires the selecting of a collection within the “Transfer to Collection” column to allow a removal. Knowing this collection is empty (by previously looking into the collection) of records you can select any collection in the “Transfer to Collection”
  - Next choose the “Action” Tab and select “Remove Collection” a confirmation dialog box will appear having a statement of reassigning records; because the Selected Collection is empty simply ignore the statement and choose “Yes” to proceed. G4 will Remove (delete) the collection that was highlighted in the Selected Collection column.