M3 Group Editor

UNDERSTANDING THE GROUP# AND ITS USE IN CATALOGING:

Mandarin Software: Automatically assigns each group created in GROUP EDITOR a Group # (Internal Serial Number). You use this number to pull up the group in CATALOGING to work on the HOLDING RECORDS it contains.

Create a New Group

- 1. Open M3 GROUP EDITOR
- 2. Click the **NEW BUTTON** and select the type of group you want: Patron, Item (book/equip) or Special Reserve **OR**
- Highlight an existing group (ex. General Collection) and click DUPLICATE BUTTON (this does save some setup time)

 Duplicate will literally copy all settings EXCEPT the actual records that were in the original group
- 4. Double click on the group ICON to open it
- 5. Name the new group: ex. FMMR Staging (You type this in the box next to "Name")
- 6. Right click several times in the lower left corner (*see picture below*) to get the group # assigned to it: 0000000010
 a. If you DUPLICATE a Group, you *must find and type in* the New Group# for it you can't "reuse"
- 7. Type that number in the box next to "Description"
- 8. Click "Apply"
- 9. Complete any other settings for this group, click "OK" when finished
- The name is stored in the 991#a field in each Holding or Patron record in the group
- Mandarin now equates the following: Group# 000000010 = FMMR Staging and vice versa
- Use the **GROUP NUMBER** to pull up records in **CATALOGING**
- Use the **GROUP NAME** when running reports in **REPORT TOOL**

Bibliographic Records are NOT stored in Groups and have no 991#a field with Group Information

Finding the number for your group:

- 1. Open M3 GROUP EDITOR and get the ISN number (Group #) of the Group you want to pull up in Cataloging.
- 2. If it's not listed, do the following:
 - a. Double Click on the Group ICON (Patron or Item) that's next to the name of your group.
 - b. In the lower left hand corner area, right click your mouse several times and the ISN number will come up.
 - *Note:* The ISN (Group #) may be listed to the right of your group name already as a 1 or 2 digit number. You will preface it with zeroes to make it a 10digit number when searching **OR** use an * to fill in for the zeros

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ISN: 0000000010				
		Example.		
	OK Cancel Apply			
	Contraction Spppy			

Bringing Up the Group in Cataloging:

A.Searching by Group ISN#

Uses: Pull up records that are in a specific group in M3 Group Editor - Holding or Patron Records

We typed in the Field #subfield (991#a) that holds the Group Info.	earch
_	0000000010 Image: Comparison of the Group# will always be a TOTAL of 10 characters.
Here we are saying: 0000000010 = FMMR Staging	
OR type *10 = FMMR Staging	OR Number local call
Either will work	
	AND Anywhere
	Search Clear
<u>Түре тне</u>	E GROUP NUMBER EITHER WAY
5	earch
	Search For: Holdings
	991#a
	*10
	OR Number local call
	AND Anywhere
	Search Clear

EDITING ITEM GROUP CIRCULATION PARAMETERS:

As a general rule, Item Groups are setup with their Circulation Parameters geared towards the largest body of patrons (students). When special parameters for a particular set of patrons are needed you would go into that patron group and do an *Item Group Override* so that the new parameters affect only that group of patrons (teachers).

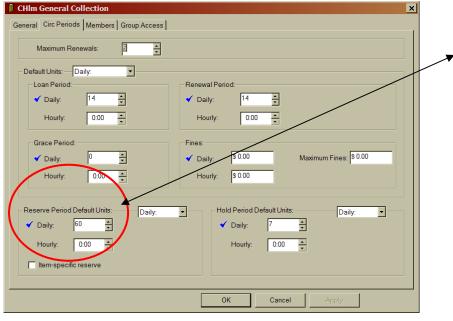
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	9 9 9 9 9 9	Inventory FOUND Inventory MISSING Periodicals Professional Collection Reference Collection Video Collection	(Group# 15) (Group# 14) (Group# 10) (Group# 8) (Group# 6) (Group# 7)		3. Click on CIRC PERIODS tab

To edit the following you must be logged on to the computer as m3admin

4. Change the number in the **RESERVE** PERIOD DEFAULT UNITS box. You can use **LOAN PERIOD** as a guideline for setting the Reserve Period.

For example: The Loan Period is 21 days. You could do 42 days so if the person who currently has the item out hasn't returned it or there is someone else ahead who has this reserved there are an extra 21 days.

- 5. Once you've entered in the number click **OK** button.
- 6. Double Click on the next group to edit or close out of M3 GROUP EDITOR



ITEM GROUP CIRCULATION PARAMETERS:

Item-specific reserve

Circulation now supports the **copy-specific** reserve. This is *enabled by a new* **GROUP EDITOR** *option* that sets the type of reserve that is <u>used for all items in that group</u>.

To access this feature so you can turn it on or off:

- 1. Open M3 GROUP EDITOR
- 2. Double Click on **GENERAL COLLECTION** group

Note: You have to edit each group/collection one at a time.

- 3. Click on **CIRC PERIODS** tab
- Look to the lower left corner of the window at the box next to "Itemspecific reserve"
 - a. **I**tem-specific reserve = turned **ON**
 - b. Item-specific reserve = turned **OFF**

Maximum Renewals:	3
Default Units: Daily:	-
Loan Period:	Renewal Period:
✓ Daily: 14	✓ Daily: 14 🐥
Hourly: 0:00	Hourly: 0:00
Grace Period:	- Fines:
✓ Daily: 0 ÷	✓ Daily: \$0.00 Maximum Fines: \$0.00
Hourly: 0:00	Hourly: \$ 0.00
Reserve Period Default Units: Daily:	Hold Period Default Units: Daily:
✓ Daily: 60	✓ Daily: 7
Hourly: 0:00	Hourly: 0:00
Item-specific reserve	

EDITING CIRCULATION PARAMETERS FOR PATRON GROUPS:

M3 Group Editor	
Display: All Groups Database Set: FMhs Catalog ? Name Description Administrators 3 Faculty/Staft 11 ILL 12 Librarians 4 Library Assistants 5 Students 2	 For Teachers: 1. Open Group Editor 2. Double Clicked on FACULTY/STAFF group
Faculty/Staff General Circ Blocks Circ Limits Circ Access OPAC Access Cataloging Access Utilities Members Item Group Overrides Group Access Overrides Co General Collection Professional Collection Reference Collection Reference Collection Edit Override OK Cancel Apply	 Clicked on ITEM GROUP OVERRIDES tab Click on item group (ex. General Collection) in the OVERRIDES window that needs to be edited Click EDIT OVERRIDE button Note: You have to edit each group/collection one at a time.
Circ Periods X Maximum Renewals: Image: Circ Period Default Units: Daily: Y Daily: 120 Hourly: 0:00 Frees: Y Daily: Y Daily: 0:00 Frees: Y Daily: Y Daily: 0:00 Hourly: 0:00 Daily: 7 Hourly: 0:00 U Daily: T Hourly: Daily: 7 Hourly: 0:00 Daily: 7 Hourly: 0:00 DK Cancel	 6. Change the number in the RESERVE PERIOD DEFAULT UNITS box. You can use LOAN PERIOD as a guideline for setting the Reserve Period. For example: The Loan Period is 120 days. You could do 150 days so if the person who currently has the item out hasn't returned it there is are an extra 30 days. 7. Once you've entered in the number click OK button.
Faculty/Staff Circ Blocks Circ Limits Circ Access OPAC Access Cataloging Access Utilities Members Item Group Dverrides Group Access Item Group S DeLETES Inventory FUUND Inventory FUUND Inventory MISSING Predection Reference Collection Edit Override OK Cancel Apply	 8. Click the APPLY button. 9. Select the next group/collection to edit in the OVERRIDES window. OR 10. If done click OK button.

PUTTING ITEM RECORDS INTO GROUPS

A. Adding holding items to a Group using the SEARCH BOX

- 1. Open the **M3 GROUP EDITOR**
- 2. Double Click on the Group you want to add things to (ex. Deletes)

M3 G	roup Editor		_ 🗆 🗙		1	CHIm DELE	TES
Display:	All Groups	Database Set: *Chittenango Middle 6-8 💌	?		0	General Circ Per	iods Members Group Access
	Name	Description					
0	Administrators	(Group 3)					
0	CHIm Faculty	(Group 8)				Name:	CHIm DELETES
0	CHIm ILL	(Group 9)					
0	CHIm Students	(Group 2)	Edit	│		Description:	(Group 13)
0	Librarians	(Group 4)					
0	Library Assistants	(Group 5)	New				
1	CHIm CDROM	(Group 17)					
0	CHIm DELETES	(Group 13)	Delete				
1	CHIm DVD	(Group 16)	Duplicate				
1	CHIm Gen Coll 2004-2005	(Group 10)	Duplicate				
1	CHIm General Collection	(Group 1)					

3. Click on the Members tab, if a window pops up saying "No records found" just click the OK button.

Search

d

Search For: Holdings

Record Status

OR 💌 Number local call

AND Anywhere

Search

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ieneral Circ Display:	Periods Members Group Access	· •	1	
	All Items Items in Current Group Only Search Scan Items into Current Group	le	Group	Location

- 4. From the **Items in Current Group** drop down menu select **Search**.
- 5. Search for whatever type of records you are looking for (here our criteria was record status of **d**)

	Call #	Barcode	Group	Location	٦
7	794.8 Der	BEE0700006	Bee General Collectio		Ballet :
2	FIC Han	120132	Bee General Collectio		Where's Wa
2	793.7 Han	120133	Bee General Collectio		Where's Wa
	MAG	28016	Bee Magazines	Bee	AMERICAN
	MAG	60310	Bee Magazines	Bee	BMX PLUS :
	MAG.	61270	Bee Magazines	Bee	DISNEY AD
	MAG	60377	Bee Magazines	Bee	BMX PLUS :
2	MAG	60316	Bee Magazines	Bee	MOTOCROS
7	MAG	60400	Bee General Collectio	Bee	MOTOCROS
	MAG.	61369	Bee Magazines	Bee	DISNEY ADV
2	TEMP Timely Topic	62823	Bee General Collectio		Getting to So
7	MAG	61131	Bee Magazines	Bee	BMX PLUS :
	MAG.	61431	Bee Magazines	Bee	SPORTS ILL
7	MAG.	61645	Bee Magazines	Bee	SPORTS ILL
7	E Par		Bee General Collectio		Junie B., first
•					Þ
	Move	Number of hold		Select All	Enselect A

- 6. Results of search come up:
 - a. click on Select All button OR

Clear

- b. checkmark the items you want
- 7. After items are checked select the **Move** button. (*you can uncheck anything you* <u>*don't*</u> *want*)
- 8. Then select the group you want (here it's **Deletes**)
- 9. All selected Items will move into the **Deletes** Group.

Bee BOCES Video Collection		ОК
Bee CDROM Collection		
Bee Deletes		Cancel
Bee DVD Collection		Cancer
Bee General Collection		
Bee General Collection 04-05		
Bee ILL Temp Adds		
Bee Inv Missing		
Bee Inventory Found		
Bee Magazines	-	

B. Adding holding items directly to a Group BY SCANNING (from a Weeding Cart etc.)

- 1. Open M3 GROUP EDITOR
- 2. Select and Open your group (here it's **Deletes**)
- 3. Click the **Members** tab.
- 4. From the Items in Current Group drop down menu select Scan Items into Current Group.

Bee Deletes							
neral	Circ Periods Members	Group Access					
Displ	av: — Items in Cum	ent Group Only	-				
All Items Items in Current Group Only Je Group Location							
	794.8 Search		Bee Deletes		Ballet :		
	FIC F Scan Items into (Current Group	Bee Deletes		Where's Wal		
	793.7 man	120133	Bee Deletes		Where's Wal		
	MAG	28016	Bee Deletes	Bee	AMERICAN (
	MAG	60310	Bee Deletes	Bee	BMX PLUS :		
	MAG.	61270	Bee Deletes	Bee	DISNEY AD\		
	MAG	60377	Bee Deletes	Bee	BMX PLUS :		
	MAG	60316	Bee Deletes	Bee	MOTOCROS		
	MAG	60400	Bee Deletes	Bee	MOTOCROS		
	MAG.	61369	Bee Deletes	Bee	DISNEY AD\		
	TEMP Timely Topic	62823	Bee Deletes		Getting to Sc		
	MAG	61131	Bee Deletes	Bee	BMX PLUS :		
	MAG.	61431	Bee Deletes	Bee	SPORTS ILL		
	MAG.	61645	Bee Deletes	Bee	SPORTS ILL		
	E Par		Bee Deletes		Junie B., first 🖕		
Number of holding records: 52 Move							
			OK Ca	ncel App	ly .		

- 5. At **Barcode** window **scan** or **type** in barcode number of all items you want to put into this Group.
- 6. When done click **OK** button

Bee Deletes General Circ Periods Members Gr	oup Access			X
Display: — Scan Items into C	urrent Group 🛛 🔻	Barcoo	le:61651	
Call #	Barcode 60151	Group Bee Deletes	Location Bee	Titl GUINESS WOR
				Þ
	Number of holding	g records: 1		
Move			Select All	Deselect All
		OK Can	cel Apply	1