


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

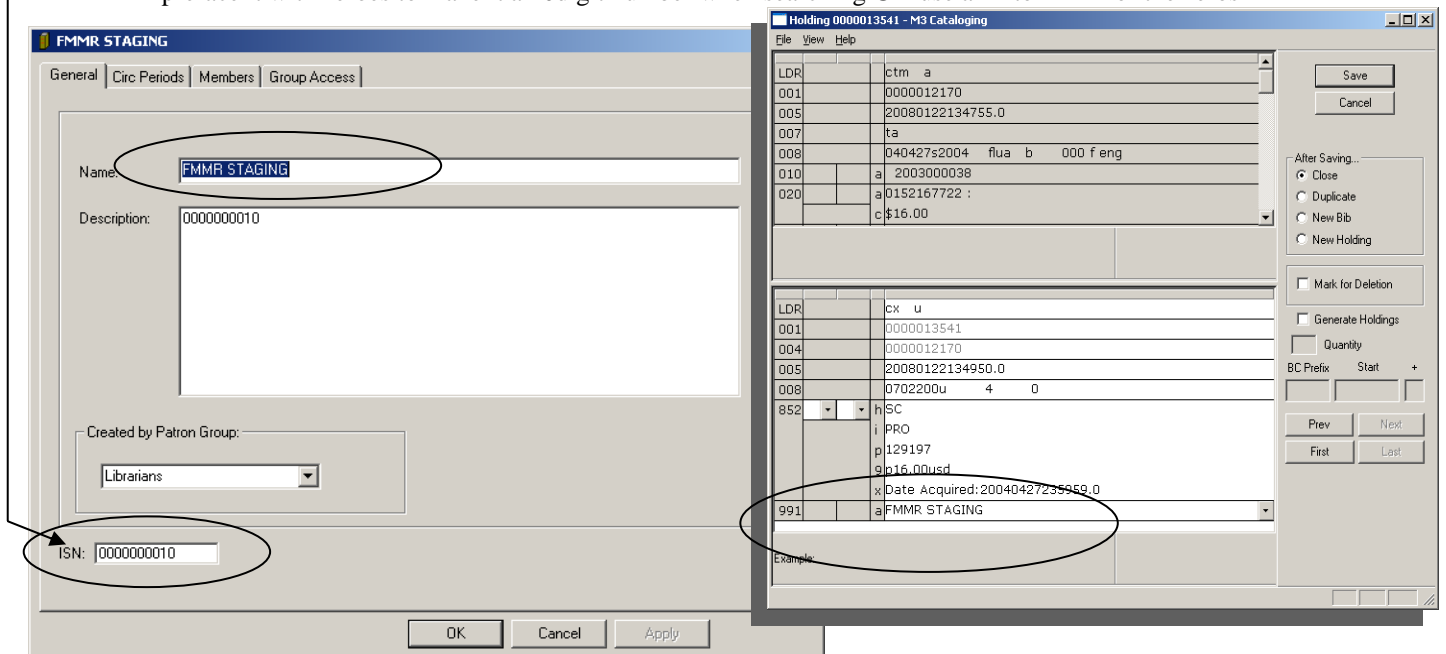
1. Open **M3 GROUP EDITOR** 
 2. Click the **NEW BUTTON** and select the type of group you want: Patron, Item (book/equip) or Special Reserve
OR
 3. **Highlight an existing group (ex. General Collection)** and click **DUPLICATE BUTTON** (this does save some setup time)
 - a. Duplicate will literally 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: **000000010**
 - 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



The screenshot shows two windows. The left window is titled "FMMR STAGING" and has tabs for "General", "Circ Periods", "Members", and "Group Access". The "Name" field contains "FMMR STAGING" and the "Description" field contains "000000010". The "Created by Patron Group:" dropdown is set to "Librarians". The "ISN:" field at the bottom left contains "000000010". The right window is titled "Holding 0000013541 - M3 Cataloging" and shows a list of holding records. The record for "991 a FMMR STAGING" is circled in red. The "Date Acquired" field is "20040427235959.0".

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.

Here we are saying:
0000000010 = FMMR Staging
OR type
*10 = FMMR Staging
Either will work

The Group# will always be a TOTAL of 10 characters.

Search For: Holdings

991#a

0000000010

OR Number local call

AND Anywhere

Search Clear

TYPE THE GROUP NUMBER EITHER WAY

IT WORKS

Search For: Holdings

991#a

*10

OR Number local call

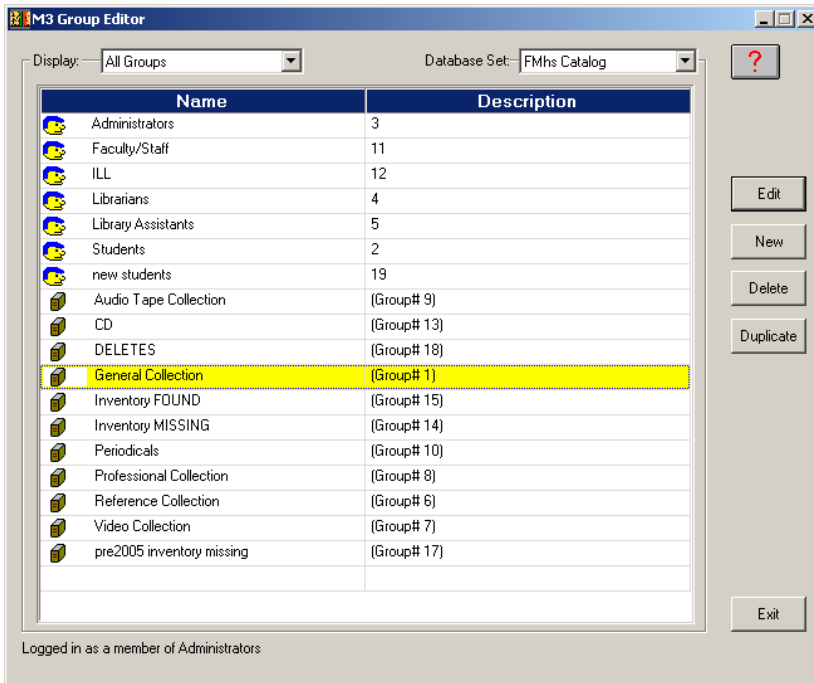
AND Anywhere

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).

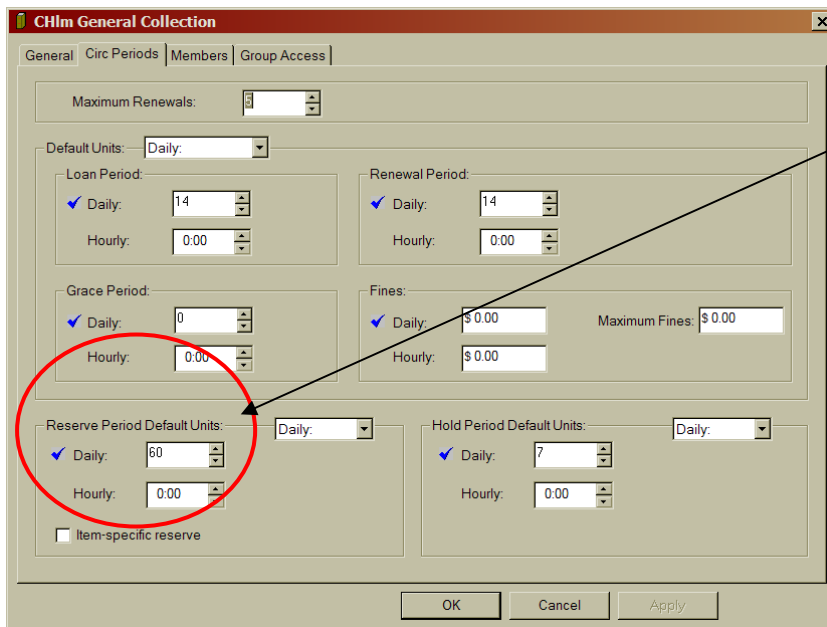
To edit the following you must be logged on to the computer as m3admin



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



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 used for all items in that group.

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

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

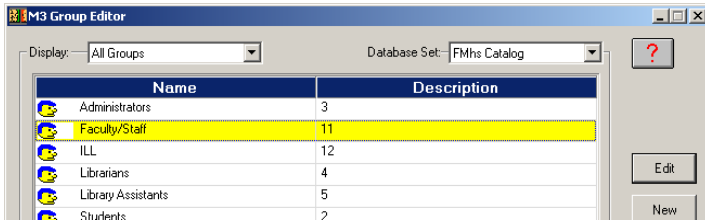
Note: You have to edit each group/collection one at a time.

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

The screenshot shows the 'CHIm General Collection' dialog box with the 'Circ Periods' tab selected. The 'Item-specific reserve' checkbox is checked and highlighted with a dashed circle and an arrow. The dialog box contains various settings for circulation parameters, including Maximum Renewals, Default Units, Loan Period, Renewal Period, Grace Period, Fines, Reserve Period Default Units, and Hold Period Default Units.

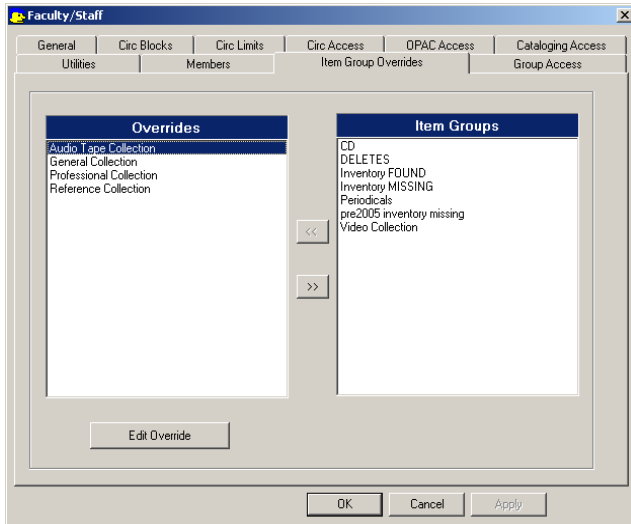
Parameter	Value
Maximum Renewals	3
Default Units	Daily
Loan Period (Daily)	14
Loan Period (Hourly)	0:00
Renewal Period (Daily)	14
Renewal Period (Hourly)	0:00
Grace Period (Daily)	0
Grace Period (Hourly)	0:00
Fines (Daily)	\$ 0.00
Fines (Hourly)	\$ 0.00
Maximum Fines	\$ 0.00
Reserve Period Default Units	Daily
Reserve Period (Daily)	60
Reserve Period (Hourly)	0:00
Hold Period Default Units	Daily
Hold Period (Daily)	7
Hold Period (Hourly)	0:00

EDITING CIRCULATION PARAMETERS FOR PATRON GROUPS:



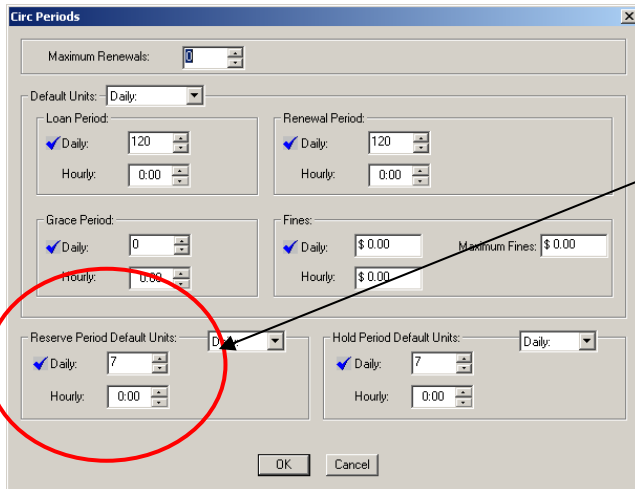
For **Teachers:**

1. Open Group Editor
2. Double Clicked on **FACULTY/STAFF** group



3. Clicked on **ITEM GROUP OVERRIDES** tab
4. Click on item group (ex. General Collection) in the **OVERRIDES** window that needs to be edited
5. Click **EDIT OVERRIDE** button

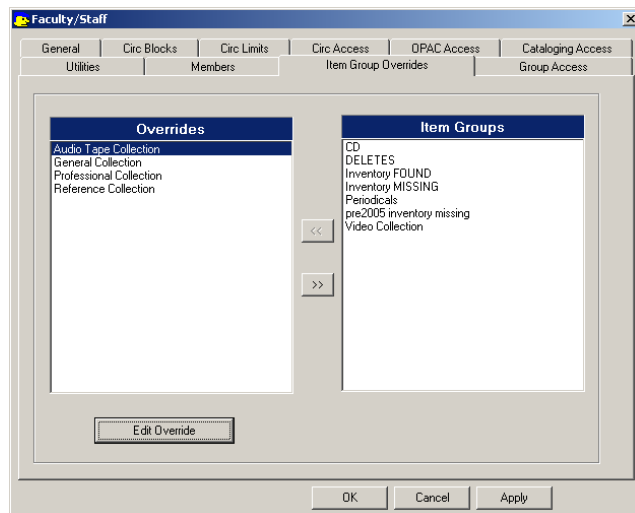
Note: You have to edit each group/collection one at a time.



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 an extra 30 days.

7. Once you've entered in the number click **OK** button.



8. Click the **APPLY** button.
9. Select the next group/collection to edit in the **OVERRIDES** window.

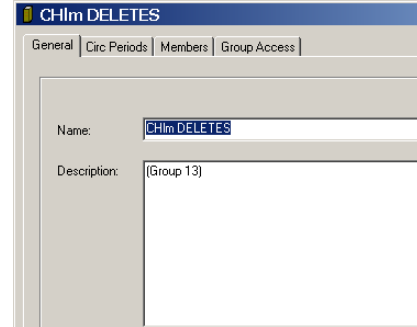
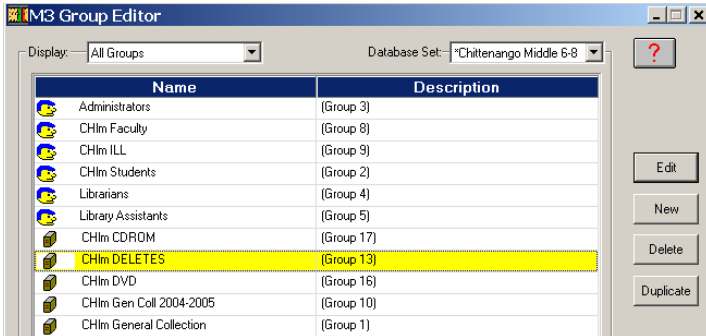
OR

10. If done click **OK** button.

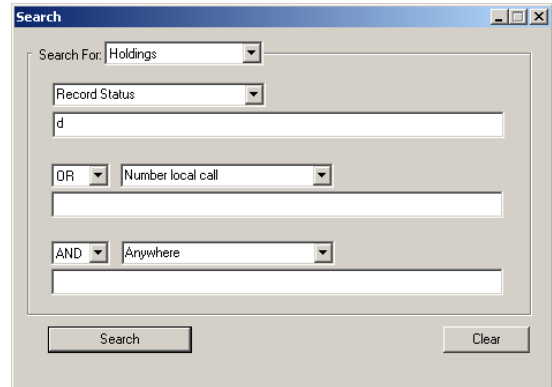
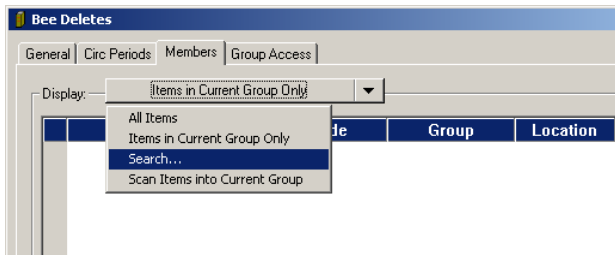
PUTTING ITEM RECORDS INTO GROUPS

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**)

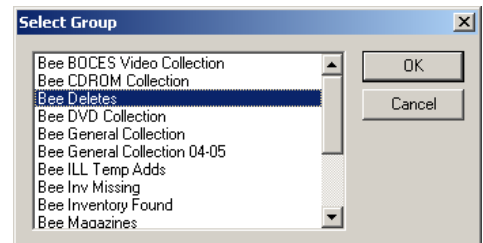
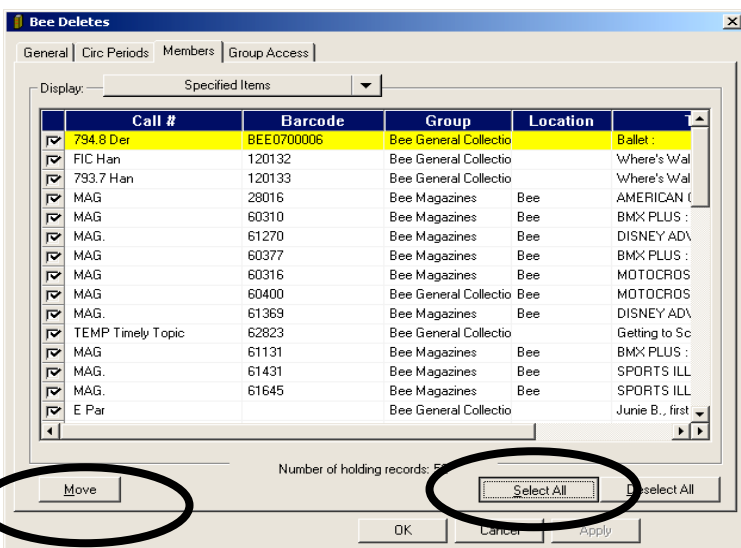


3. Click on the **Members** tab, if a window pops up saying **“No records found”** just click the **OK** button.



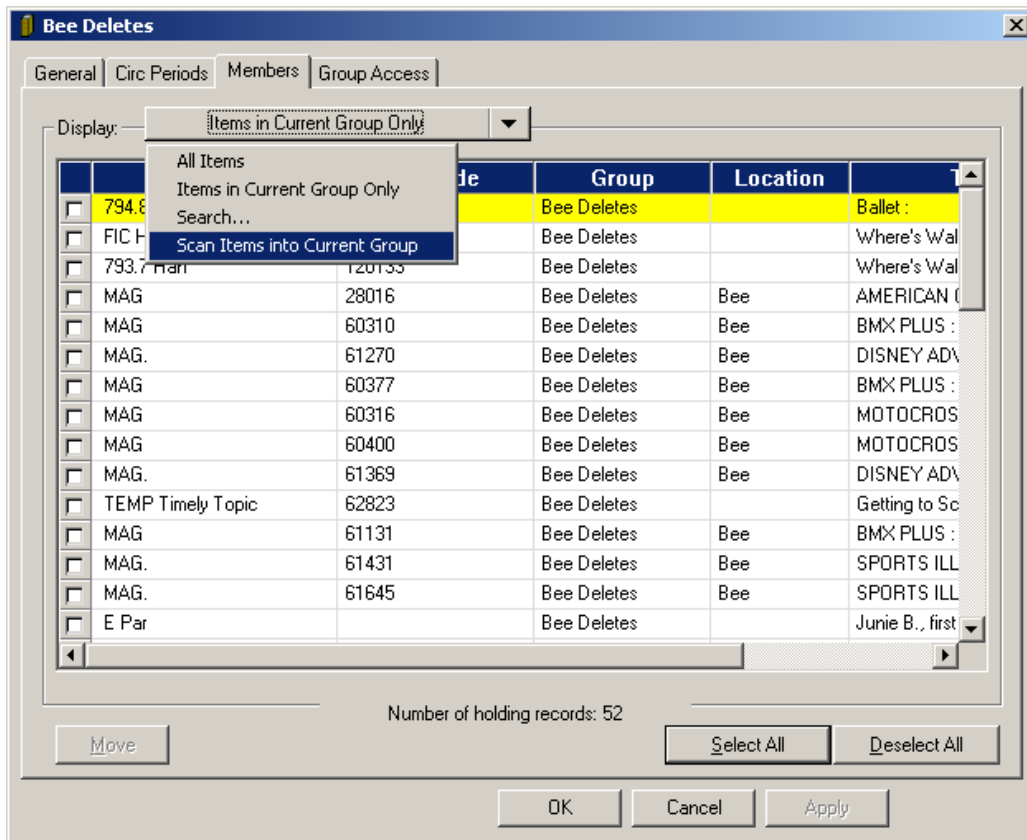
4. From the **Items in Current Group** drop down menu select **Search**.
5. Search for whatever type of records you are looking for (here our criteria was record status of **d**)

6. Results of search come up:
 - a. click on **Select All** button **OR**
 - b. checkmark the items you want
7. After items are checked select the **Move** button. (*you can uncheck anything you don't want*)
8. Then select the group you want (here it's **Deletes**)
9. All selected Items will move into the **Deletes** Group.



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**.



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

