Item Bulk Changes in Leap

Staff who are part of the Public Services Item Editing permission group or the Cataloging 1 permission group are able to perform item bulk changes in Leap using Record Sets. Staff are able to bulk change all records in the set at once, or pick-and-choose select records to perform an ad-hoc bulk change.

BULK CHANGE THE ENTIRE RECORD SET

1. Open the desired record set.

2. Use the top Actions drop-down menu and select Bulk Change. The bulk change workform will appear.

3. A bulk change report will automatically be generated and downloaded after the items are updated. This report will tell you if any items were not able to be changed and why. The report name will default to “ItemBulkChangeReport” and the date/time stamp. Rename the report if desired.

4. If using a Template, select the desired template.

5. There is also the option to copy items that were not able to be changed to an Error Record Set. This is optional, but may be helpful for staff who would like to track or manually change items that had errors.

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6. If you are not using a bulk change template, use the data category tabs to select which fields to change and choose the updated values.

   a. **Notes about hold settings:** The hold options in the Leap bulk change workform are expressed using “checked” for a positive value and “unchecked” for a negative value.

   b. **EXAMPLE 1:** To make items holdable by all patrons, select CHECKED for Holdable and UNCHECKED for the subcategories.
c. **EXAMPLE 2:** To make items holdable only by local patrons, select CHECKED for Holdable and CHECKED for patrons from this library and branches.

![Example 2 Image]

d. **EXAMPLE 3:** To make items non-holdable, select UNCHECKED for Holdable.

![Example 3 Image]

7. When ready, select Update Items. A pop-up detailing the summary of changes will appear. Review the fields and values that will be changed. Once a bulk change is complete, the change cannot be undone!

![Summary of Changes Image]

8. Click Continue to launch the bulk change.
9. Staff will see a pop-up confirming the bulk change was successful or if there were any reported errors.

10. The bulk change report will automatically download. Click to open and review changes and/or see details about errors.

AD HOC BULK CHANGE

Ad Hoc bulk change allows staff to make changes to a select number of items rather than the entire record set.

1. Open the desired record set.

2. Select the individual items to bulk change.
3. Use the Actions drop-down menu at the top of the table and select Ad Hoc Bulk Change.

4. The bulk change workform will appear with the same options as the full bulk change. Make adjustments to the bulk change report and error record set if necessary, select the fields to change and input desired values.

5. Select Update Items when ready.

6. A pop-up detailing the summary of changes will appear. Review the fields and values that will be changed. Once a bulk change is complete, the changes cannot be undone!

7. Click Continue to launch the bulk change.
8. Staff will see a pop-up confirming the bulk change was successful or if there were any reported errors.

9. The bulk change report will automatically download. Click to open and review changes and/or see details about errors.