Adding and maintaining Item Notes

Since information of a local nature cannot be added to a bibliographic record in the PINES database (see Copy Cataloging Procedures), item notes are attached to item records to provide local information. Item notes are governed by local policy and procedures and their use is optional for libraries. While there is no PINES policy that governs their use, best practice is to use defined titles for the notes and similar language for notes using the same title.

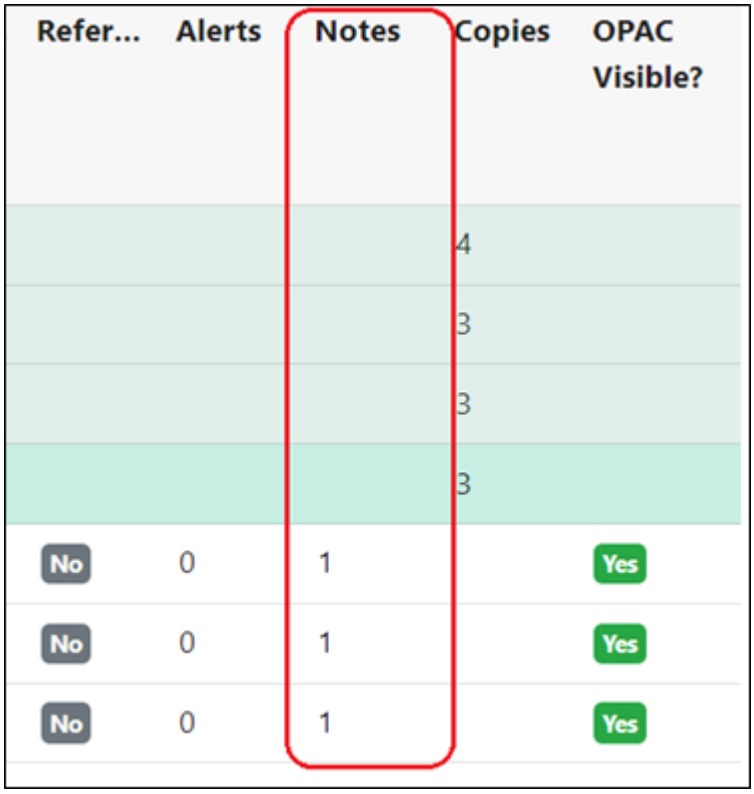
- Unlike item alerts, item notes do not affect the circulation process.
- Item notes are not searchable within the database but are reportable.

As of March, 2023, notes are not editable. Review notes before you proceed with saving them

As of March, 2023, item notes cannot be applied from Holdings Templates. They can be in the template but will not apply when the template is.

Notes can be public and thus visible in the OPAC or just visible in the item editor. Typical public notes might identify a donor, or that an item is missing accompanying material. Private notes might indicate which staff member has an Office copy. Multiple notes can be added to a single item but must be added one at a time. Identical item notes can be added to several items simultaneously in the item editor.

Item notes can only be seen in the OPAC if public and item attributes if not. In holdings view, you can see the count of notes on an item if you chose notes column for display.



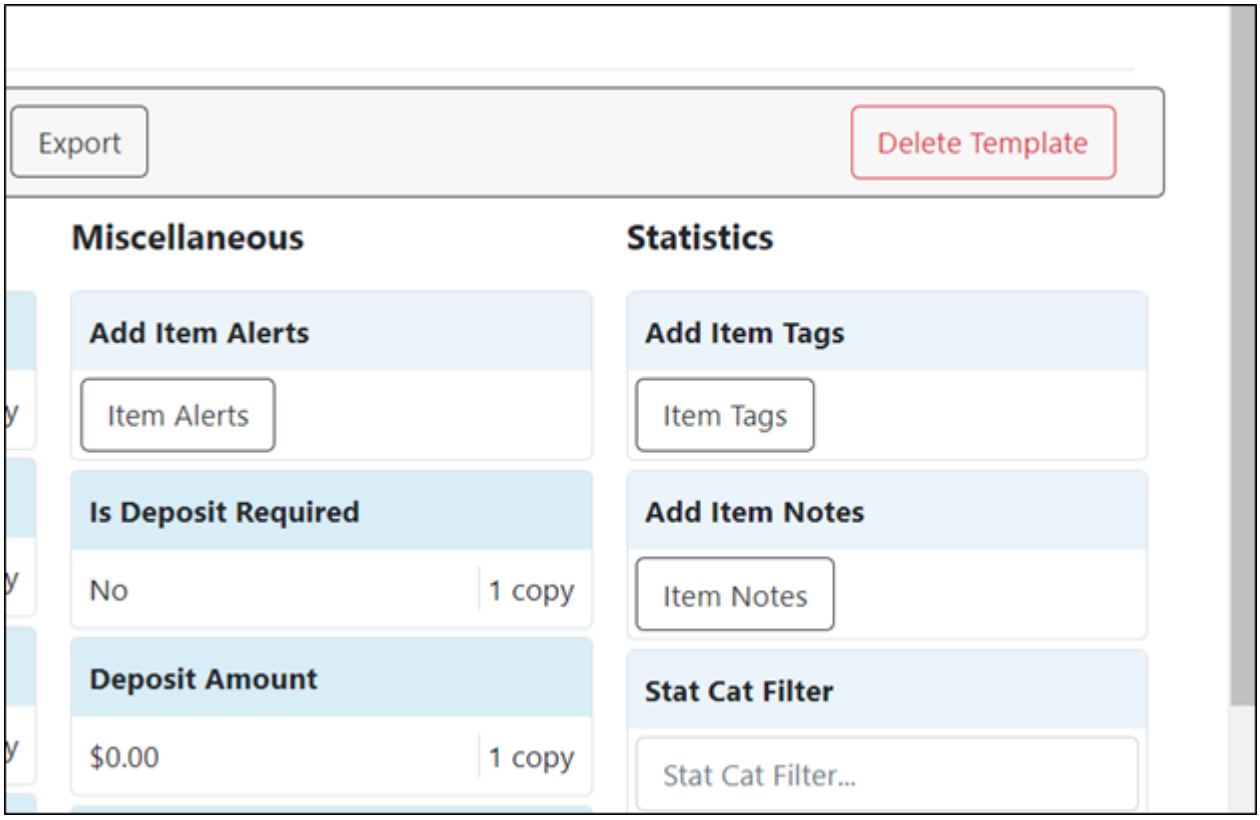
Refer...	Alerts	Notes	Copies	OPAC Visible?
			4	
			3	
			3	
			3	
No	0	1		Yes
No	0	1		Yes
No	0	1		Yes

Add, edit, or remove item notes in existing copies

Using the Holdings Editor via Holdings view, item status, or item buckets

From **Holdings View**, **Item Status**, or an **Item Bucket**, access the **Holdings Editor** from the **Actions** menu – **Edit Items** or **Edit Selected Items.**

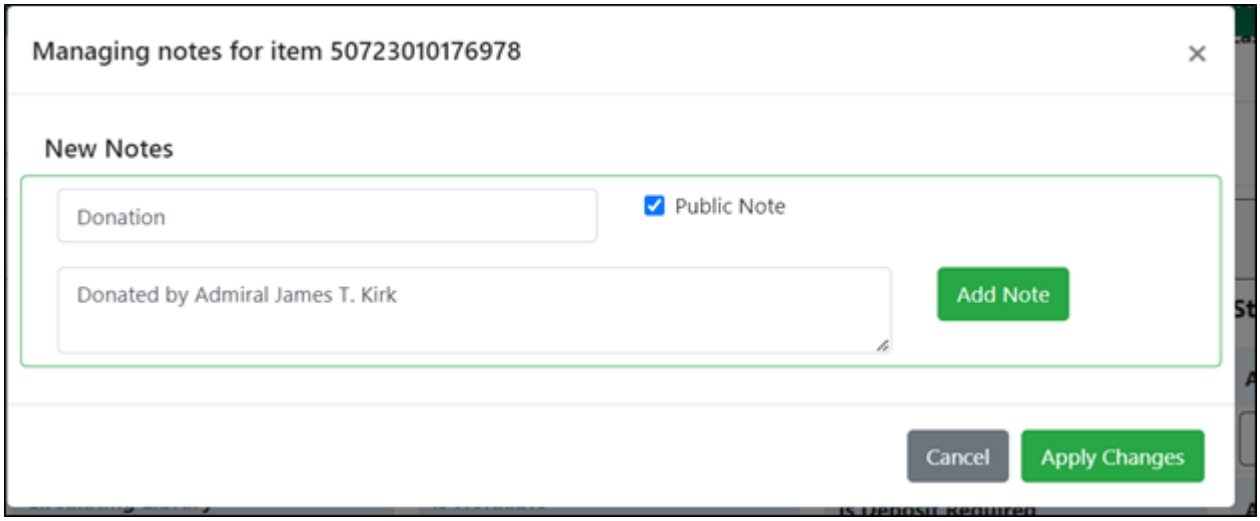
Click on the **Items Note**s button on the right-hand side of the screen.



Enter a title for the note type you are entering. ***Titles are required for notes***. Best practice is to use the same title for a note type such as Gift, Donation, Funds, Office copy, Condition alert, etc.

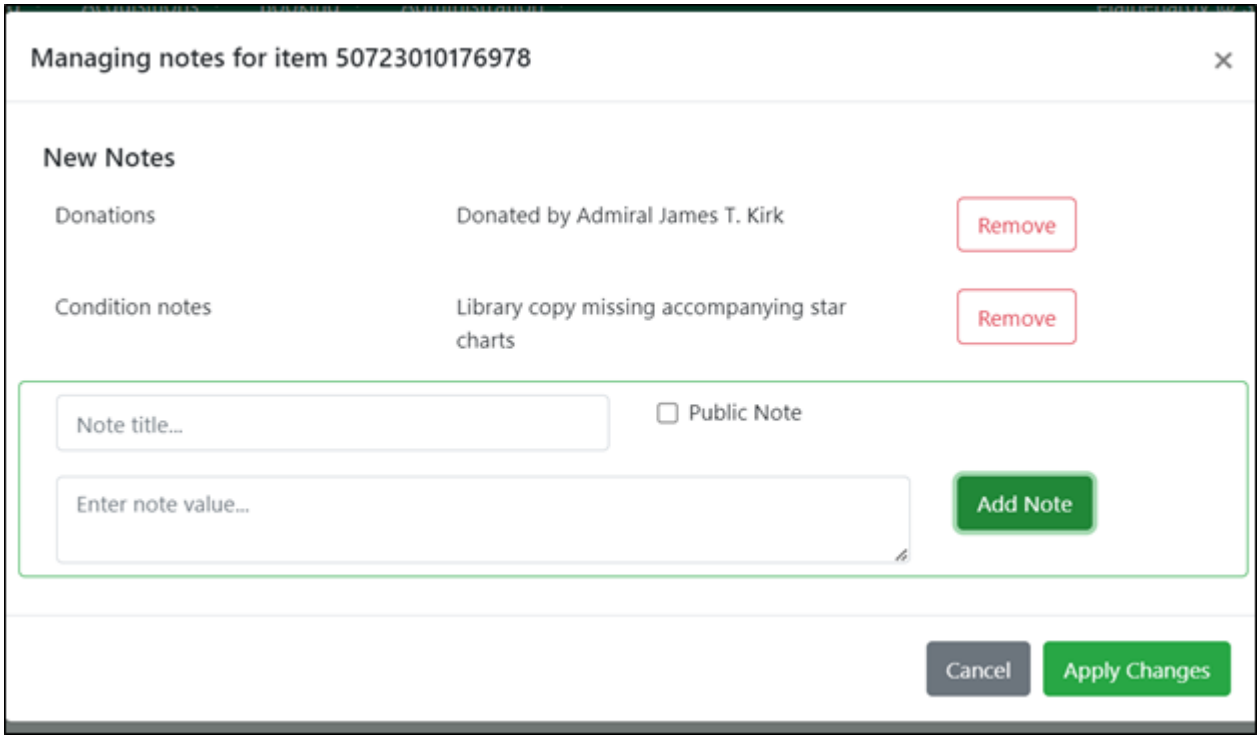
Check **Public Note** if you want the note to be visible in the OPAC.

Enter the text of the note.



Begin the process to save the note by clicking on **Add Note**. You will be able to view the note before you finish the save process. Remove it and start over if there are any errors.

You can continue to add additional notes, if needed. Click on **Add Note** after each entry.



Once you are satisfied with the note(s), click on **Apply Changes**. The dialog box will close, and you will be returned to the **Holdings Editor**.

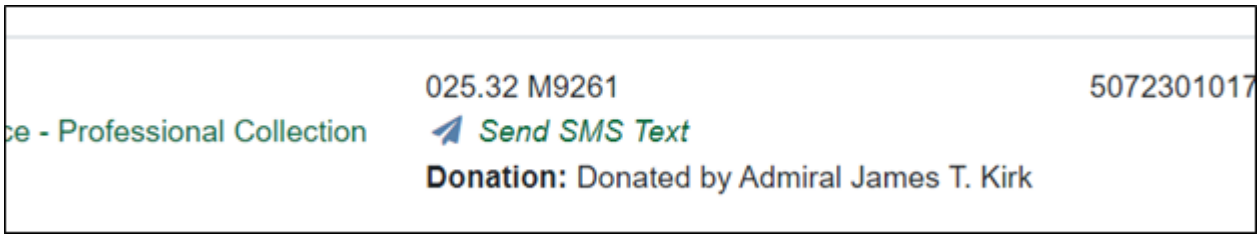
Complete any other edits to the item needed and then click on **Appy All, Save & Exit** or **Apply All and Save**. If you do not take this last step, the note will not save.

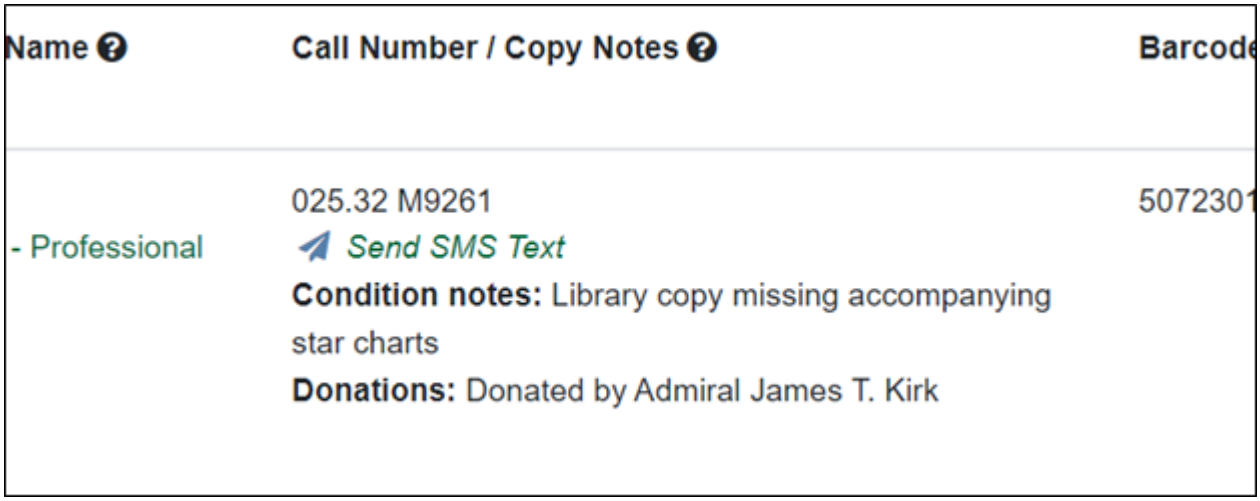
If you are in **Holdings View**, the note counter does not automatically update. You will need to refresh the page to see the count.

If your note is public, you can verify it by clicking on the **Patron OPAC View** button under the record

summary.

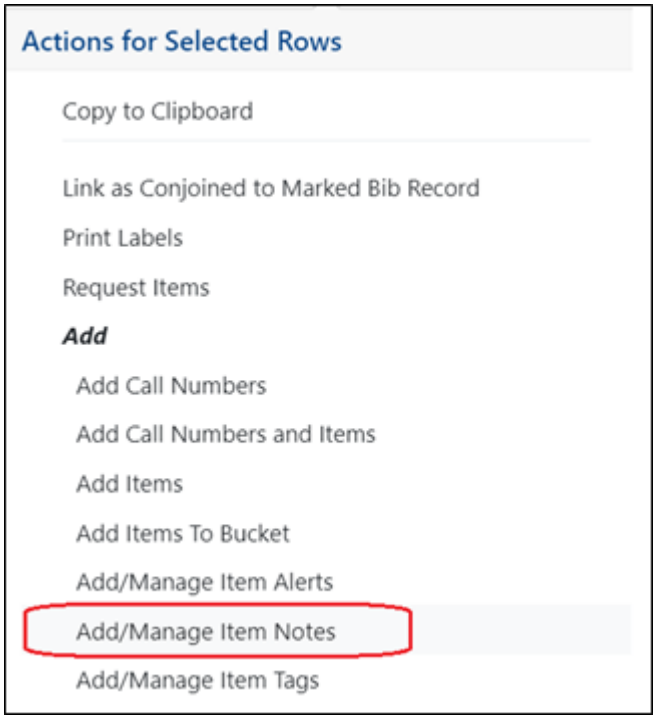
A new tab will open with the OPAC view. Navigate to your holding to see the note.





Using Add/manage Item notes

In Holdings View, you can access the item note manager from the **Actions** menu – **Add/manage Item Notes**

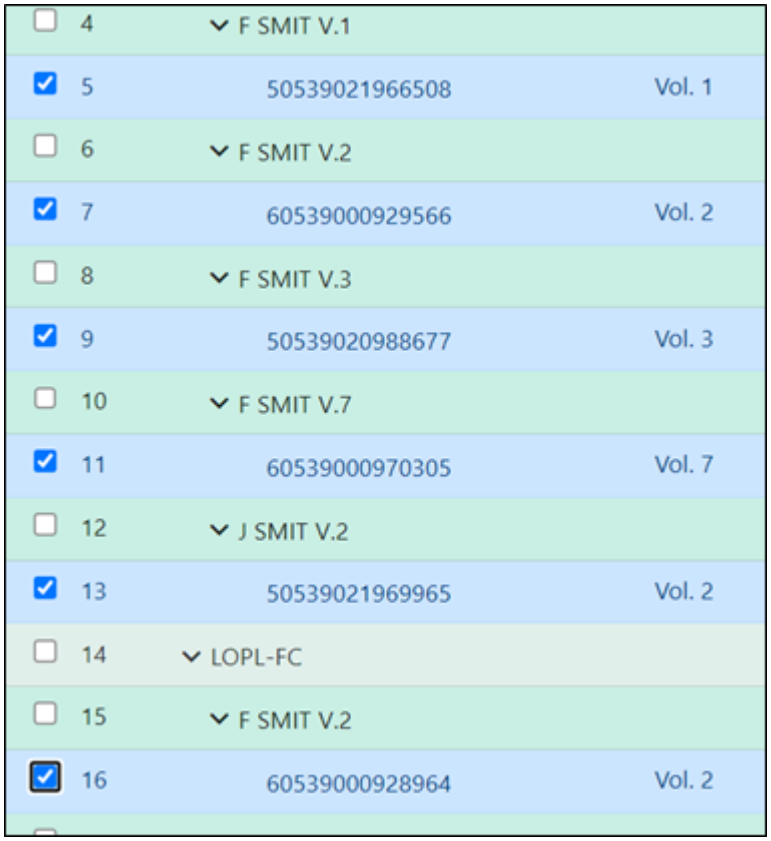


The management dialog box will open. Follow the directions above for adding and deleting notes.

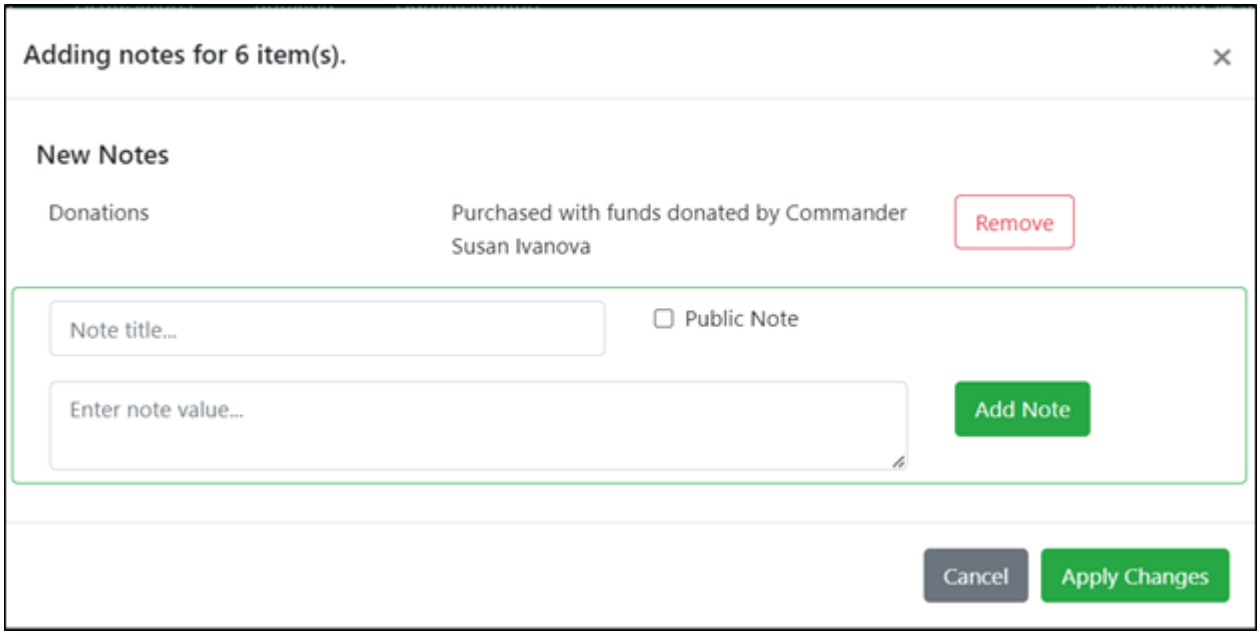
Once done, click on **Apply Changes**. The dialog box will close, and the note counter will automatically update.

Adding identical notes to multiple existing copies

From **Holdings View**, **Item status**, or **Item Buckets**, select the items needing notes.



Access the notes manager either through the **Holdings Editor** or **Add/Manage Item Notes**. The dialog box will have a heading for the number of items getting the notes. Follow the directions above and add a title, check the Public Note box (if the note is to be public), add the note text, and then click on **Add Note**.



Once you are satisfied with the note, click on **Apply Changes**, and, if in the **Holdings Editor**, **Apply all and Save** or **Apply All, Save, and Exit**.

Public notes will appear on each item in the OPAC.

F SMIT V.1 Send SMS Text **Donations:** Purchased with funds donated by Commander Susan Ivanova	Vol. 1	505390219
F SMIT V.2 Send SMS Text **Donations:** Purchased with funds donated by Commander Susan Ivanova	Vol. 2	605390009
F SMIT V.3 Send SMS Text **Donations:** Purchased with funds donated by Commander Susan Ivanova	Vol. 3	505390209
F SMIT V.7 Send SMS Text **Donations:** Purchased with funds donated by Commander Susan Ivanova	Vol. 7	605390009

Adding notes at cataloging, single or multiple items

As you are adding items in the **Holdings Editor**, click on the **Item Notes** button.

Add your note as above. This will add the identical note to all copies you are creating. If the note is for just one of the copies, add it after you have created all the copies.

Live Oak Public Libraries: Bull St. Library	Test *Send SMS Text* **Funding organizations:** The Earth Alliance and Minbari Federation	Test031701	N
Live Oak Public Libraries: Bull St. Library	Test *Send SMS Text* **Funding organizations:** The Earth Alliance and Minbari Federation	Test031702	N
Live Oak Public Libraries: Carnegie Library	Test *Send SMS Text* **Funding organizations:** The Earth Alliance and Minbari Federation	Test031703	N
Live Oak Public Libraries: Carnegie Library	Test *Send SMS Text* **Funding organizations:** The Earth Alliance and Minbari Federation	Test031704	N

Editing notes

As of March 17, 2023, notes are not editable.

Deleting notes

After accessing the note through the **Holdings Editor** or **Add/Manage Item Notes**, click on the **Remove** button by the note you wish to remove.

Then click Apply changes, and if in the **Holdings Editor**, **Apply all and Save** or **Apply All, Save, and Exit**.

You can only delete notes from one item at a time.

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https://pines.georgialibraries.org/dokuwiki/ - **PINES Documentation**

Permanent link:
https://pines.georgialibraries.org/dokuwiki/doku.php?id=cat:item_notes

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