Adding & Editing Items

This section explains how to add and edit items. This is useful for adding donated items and magazines to the collection, and for editing the records of items to show that they have been discarded or have a new location or barcode.

🖨 Printable Quick Guide: Adding an Item

Adding an Item

Donations and Locally Purchased Items

Items such as donated or locally purchased books and dvds can be added to Horizon directly at sites. The way to do it is:

1. **search for the title in Horizon:**
   - identify the correct version
   - check that there isn't already a local copy recorded
2. **tell Horizon to create an entry for the local copy:**
   - add a barcode and scan it in
   - save the entry
3. **prepare the item for circulation:**
   - add a spine label and due date label
   - mark the item as belonging to our organization and to your location

Before You Begin

Read the Guide!

> It's important that we accurately record new copies of titles, such as identifying the particular format or edition.

For this reason a definitive guide to [Adding Items to the Catalogue](#) can be found in the Staff Portal and should be read before adding any items to the system.

What if I Can't Find a Record for this Title, or for this Particular Version?

> If a title isn't recorded in the system then a copy cannot be added at a site.

You will need to contact Technical Services and provide them with details about the title so that they can add it to the collection.

> The [Cataloguing by Mail](#) guidelines can be found in the Staff Portal.

Example: adding a copy of a locally purchased book to the collection

Suppose the book Shattered Mirror by Iris Johansen has been purchased locally. To add it to the system, first search for it. The results look like this:

Title/Pub date	Format	Author
Shattered mirror. c2001.		Atwater-Rhodes, Amelia.
Shattered mirror -- c2009.		Atwater-Rhodes, Amelia.
Shattered mirror. 2018.	[online electronic book]	Johansen, Iris.
➡ Shattered mirror. c2018.		Johansen, Iris.
Shattered mirror p2018.	[sound recording (CD)] /	Johansen, Iris.

The arrow appears to be pointing to the correct entry: the title and author match, and it's a book. The publication date matches the details inside the book too.

If you click on **Show Details** you'll see more information about this entry which can help you to decide if your item is a match:

Author	Johansen, Iris.
Title	Shattered mirror.
Publ. Info	c2018.
Series	Johansen, Iris. Eve Duncan forensics thriller ; bk. 23.
Summary	From the number one New York Times best selling author comes a new explosive thriller featuring forensic sculptor Eve Duncan. Iris Johansen returns with a thrilling novel of action and danger where fan favorite Eve Duncan is thrown once more into a deadly game of intrigue.
Subjects	Mystery fiction. Suspense fiction.
ISBN	9781250075864

In this example the ISBN matches the physical item, so it's safe to add a local copy to this record.

> If you are unsure if an item matched the record then you would stop here and re-consult the guidance in the Staff Portal or contact technical services for more advice.

Click on **Show Copies** to bring up the list of copies already in the system:

	Loc/Call No.	Due Date/Coll	Status	Barcode/Copy
Author Johansen, Iris.		Title 1 of 1		
Title Shattered mirror.		Requests 1		
➡	1. Mount Pearl (AMP) R. King FIC JOH	Adult Fic	Checked In	33296030988633 bk. 23
	2. Mount Pearl (AMP) R. King FIC JOH	Adult Fic	Checked In	33296030988351 bk. 23
	3. Conception Bay South (ACS) FIC JOH	Adult Fic	Checked In	33296030988641 bk. 23
	4. Bell Island (ABI) FIC JOH	Adult Fic	Checked In	33296030988674 bk. 23
	5. Bay Roberts (ABR) FIC JOH	Adult Fic	Checked In	33296030988468 bk. 23
	6. Bay Roberts (ABR) FIC JOH	Adult Fic 02/26/19	Checked out	33296030988500 bk. 23

Here you can check if a copy is already recorded for your location. If there is then it will appear at the top of the list.

If there is already a copy showing at your location then consider if you need to add a second. If the copy that's showing is missing then consider using the new item as a replacement and simply record the new barcode. See the section *Replacing a Barcode* for more details.

In this case there isn't a copy showing for this location so you can go ahead and add a copy to the record. Click on the **Send To** button   in the toolbar. A pop-up box appears:
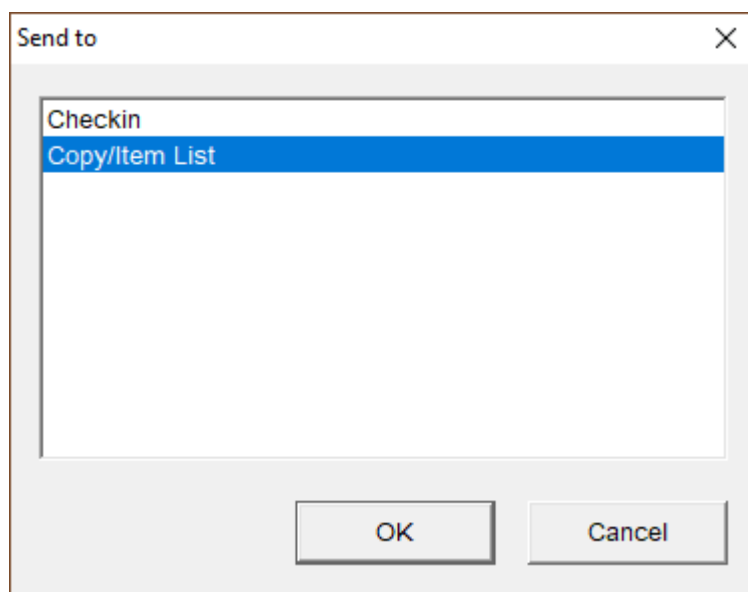
Select **Copy/Item List** and click on **OK**. The List Items window will open:

	Barcode	Coll	Call No.	Copy	IType	Status	Loc
1.	33296030988674	af	FIC JOH	bk. 23	b	i	abi
2.	33296030988468	af	FIC JOH	bk. 23	b	i	abr
3.	33296030988500	af	FIC JOH	bk. 23	b	o	abr
4.	33296030988682	af	FIC JOH	bk. 23	b	i	abs
5.	33296030988575	af	FIC JOH	bk. 23	b	i	acr
6.	33296030988641	af	FIC JOH	bk. 23	b	i	acs
7.	33296030988583	af	FIC JOH	bk. 23	b	pr	afh
8.	33296030988591	af	FIC JOH	bk. 23	b	i	ahd
9.	33296030988609	af	FIC JOH	bk. 23	b	o	ahg
10.	33296030988633	af	FIC JOH	bk. 23	b	i	amp
11.	33296030988351	af	FIC JOH	bk. 23	b	i	amp

Selection 10   Total: 88

Edit   New   Sort...   Display...   Detail Status   Batch Create

It is tempting to click on the New button to add a new entry. **Don't!**

Why? The New button will open the correct window to add a new item. However most of the details will be left blank, such as which collection the item belongs to and the Call Number. If you make a mistake or leave out any details then your entry won't be catalogued correctly.

To add a new entry for your copy, select from top menu **File > Copy Record**. The Item Edit window will open:

Attach a barcode to the item and scan it in.

> Don't alter any other details in the record!

The location field is automatically set to your location and you can see that details are automatically completed for collection, call number, item type and price.

Click on **Save**. The item is now added to the system.

> Notice that the item's status is recorded as *Available Soon*. This is to allow you time to add a spine label, dust jacket and due date label to the item, and to mark it as belonging to our library system and your location.

When the item is ready to circulate, check it in.

Magazines and Periodicals

Magazines and periodicals are added in the same way that books and dvds are added, with an extra step that you will need to record the date for the magazine in its entry:

The format for the date needs to be precise:

type	date format	example
weekly	3-letter month, space, **DD/YY**	**Feb 28/19**
monthly	3-letter month	**Jun 19**
quarterly or irregular	as it appears on the item	**Spring/Summer 03**

For full guidance on how to add a magazine please refer to [Adding Items to the Catalogue](#) in the Staff Portal.

Editing an Item

 ### Printable Quick Guide: Editing an Item

Sometimes information about an item needs to be changed. Such as when it's being reallocated to a new site, when it's being discarded or when it needs a new barcode.

Items can be edited one-at-a-time or in groups. This section explains how to edit items one-at-a-time.

> To see how to edit several items at-a-time refer to the section *Item Group Editor*.

Finding the Entry for the Item

To edit an item we first need to find it in the system.

When the Item is Present and has a Barcode

If an item is present and has a barcode then the quickest way to edit it is to:

- scan the item into the checkin
- click on **Edit Item**

When the Item is Not Present or Does Not Have a Barcode

If an item is not present or does not have a barcode then you will need to search for it and select it in the Copies window.

See the section *Searching for an Item by Title* for how to do that.

With the correct copy of the item selected:

- click on the **Send To** button
  - the Send To pop-up box will open
- select **Copy/Item List**
- click on **OK**
  - the List Items window will open:

	Barcode/Fast-Add?	Coll	Call No.	Copy	IType	Status	Loc
1.	33296026205778	yfpb	FIC SAI	bk. 4	b	i	apc
2.	33296019631691	yfsc	FIC SAI	bk. 4	b	i	sjc
3.	33296019589345	yfsc	FIC SAI	bk. 4	b	i	wcb

The correct copy should be highlighted, but double-check.

> It is very easy to accidentally edit an item that belongs to another location, and Horizon will not warn you.

Click on the **Edit** button at the bottom of the window to open the Item Edit window.

From the Item Edit window you can change several details about an item.

Changing the Status

The status of an item can be changed, such as to show that it's being discarded, needs to be traced, or is being moved from the non-fiction to reference collection.

To change the status, delete the current status and type in the code for the new status.

Example: showing that an item has been discarded

Click on **Codes** see all possible codes. The list is comprehensive and some status codes are not used.

> Some status codes cannot be changed or used in the edit window, such as 'checked in', 'checked out' or 'lost'. To check a book in or out you will need to use regular circulation procedures, such as checking the item in or out.

> If you have an item that requires a status change that cannot be done using the edit

Here are some commonly used status codes. Codes shown in yellow are automatically assigned by the system, the others can be assigned by staff:

status	description	status	description
as	available soon	me	mending
bm	back room	lo	librarian's office
c	claimed returned	mi	missing inventory
d	discarded	nc	non-circulating
dis	on display	o	checked out
e	item hold expired	pr	please request (ask if available)
h	item being held	s	shelving cart
i	checked in	tr	in transit
l	lost	trace	trace
m	item missing	yad	YA display

Changing the Location

The location that an item belongs to can be changed in the edit window.

Just replace the 3-letter location code with the new one, then click on **Save**. Use the **Codes** button if you don't know the code:

| * Location | sjh | St. John's - A.C. Hunter (SJH) | Codes |

Replacing a Barcode

A worn or missing barcode can be replaced. Bring up the item's edit window, then:

- ○ delete the old barcode
- ○ scan in the new barcode
- ○ click on **Save**

> This also applies if a borrower loses an item and replaces it. Add a new barcode to the replacement item and then edit the item's record as shown above. Then check the item in.

Adding a Checkin Note

If an item has light damage but is otherwise good to circulate then you can add a checkin note to the item's record. This will let staff and borrowers know that we are already aware of the damage.

You can reach the item's Edit Window by checking in the item or by searching for it, as explained above in Finding the Entry for the Item.

If the item is already checked out then you can also edit it from the borrower's checkout window:

- ○ click on **All Items Out**
- ○ select the item
- ○ click on **Edit Item**

When you add the checkin note describe the existing damage clearly and succinctly:

Checkin Note	Pre-existing damage. Front cover torn in top right corner

Tracing Items

Recording that an Item Needs to be Traced

Suppose that an item shows as checked in, but you can't find it on the shelves. That might happen when you run the daily *Pull List*, or when a borrower asks for the item.

If the item can't be found after a quick check then you will need to record that it needs to be traced.

Search for the item in Horizon, go into its record and *change its status* to 'trace':

* Status	trace	*Trace*

This will let staff and borrowers know that the item is not available for loan.

> **Do not use the statuses of 'item missing' or 'missing inventory'.** These statuses are assigned by the system, for example when a borrower pays for a lost item.

The Trace Items Report

At regular intervals reports are generated which list all the items needing to be traced at each location.

When you receive the report for your site, check the shelves and other likely hiding places for the missing items.

If an Item is Found

If you find an item that was set-to-trace, just check it in and re-shelve.

Item Group Editor

🖨 Printable Quick Guide: Item Group Editor

The Item Group Editor lets you change several items' records at the same time.

This is particularly useful if you have weeded many items and need to show that they are discarded, or if your division uses a book exchange and you need to update the location for a set of books.

You can edit several items using the group editor in one of two ways:

- by scanning each item into a list and then telling Horizon to change the same information for every item
  - this is the easiest way to discard a set of books, or change their location
- by saving a *Group* of items that can be retrieved and worked with later

We'll look at both.

Using the Group Editor without Creating a Group

If you have a physical pile of items that you want to discard, or change the location of, the quickest way to do it is:

- open the group editor
- scan in the items
- select them all
- edit them all as a batch

So, click on the **Item Group Editor** button in the taskbar.

The Group Editor window will open and the Compound Search pop-up will appear:

Then:

- select Append List - or only the first item will scan.
- click in the 'Search for' field to focus it ready for scanning.
- scan the pile of items
  - they will form a list in the group editor window
- click on the X in the top-right corner of the pop-up when done
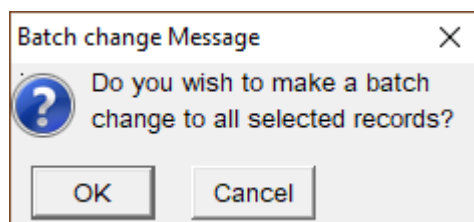
The list will look like this:

	Collection	Call No.	Author	Title
1.	yfsc	FIC SAI	St. Crow, Lili.	Defiance.
2.	afsc	FIC STE		Steampunk.
3.	yf	FIC PIK	Pike, Christopher,	Thirst. No. 1.
4.	yfsc	FIC SAI	St. Crow, Lili.	Strange angels.
5.	yf	FIC MAB	Maberry, Jonathan.	Fire & ash.
6.	af	FIC GAB	Gabaldon, Diana.	An echo in the bone.
7.	yf	FIC NIX	Nix, Garth. 1963-	The Abhorsen trilogy.
8.	yf	FIC PIK	Pike, Christopher,	The secret of Ka.
9.	yfpb	FIC OPP	Oppel, Kenneth.	The live-forever machine.

Selection [   ]   Total: 9

[Edit]   [New]   [Sort...]   [Display...]

To edit all the items in the list:

- select them all:
    - press **[Ctrl] + [A]** or select from top menu **Edit > Select All**
- click on **Edit**
    - the batch change warning message appears:

Batch change Message   ✕

? Do you wish to make a batch change to all selected records?

[OK]   [Cancel]

- click on **OK**
    - the batch change window will open:

The batch change window lets you change one or more of these things for all the selected items:

- Collection
- Item Type (Itype)
- Item Status
- Location
- Checkin Note

Don't change or add anything more than you need to.

For example, if you are wanting to discard this pile of items then *only* change the item status to 'd' for *discarded*.

Click on **Save** and **Close**. The batch change will be applied to all the items.

Press **[Esc]** to close the group editor window.

Working with Saved Groups

Items can be saved into a group which can be retrieved and used later.

This can be useful if you have used the Item Report feature to find a list of items and need to edit some or all of them.

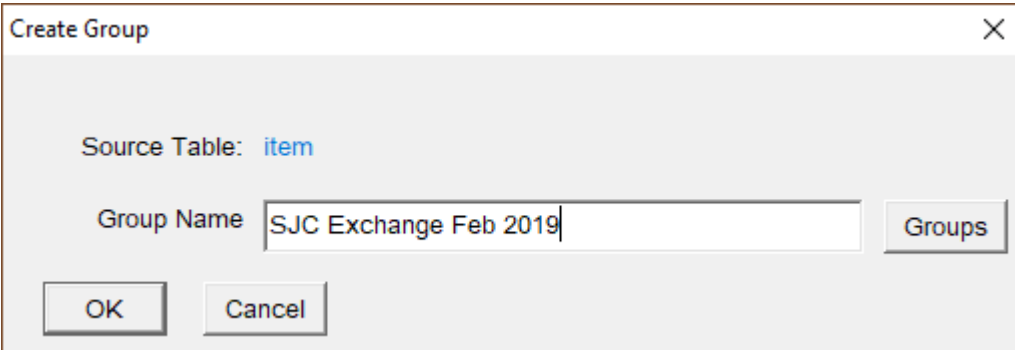See the case study *Using Groups when Weeding* as an example.

Creating a Group

To create a group first make a list of items. This can be done either by scanning them in using the method shown in *Using the Group Editor without Creating a Group*, or by searching for them using *Item Report*.

Next, to save the list of items as a group:

- ○ select the items you want to put in the group
    - ○ to select all items press **[Ctrl] + [A]**
- ○ select from top menu **Group > Save Group**
    - ○ the Create Group pop-up appears:

> Give the group a meaningful name. *Always* begin the name with the 3 letter code for your location or department.

If you have created a group because you want to make a temporary change to the items then include the change in the group name. For example:

<p style="text-align:center">'SJC – Audio Exchange June 2019 (Loc: SJA to SJC)'</p>

Click on **OK** to save the group.

Retrieving a Group

To retrieve a group so that you can work with it, open the Group Editor:

- ○ click on the **Group Editor** button to open it
    - ○

the compound search window will pop-up
- ○ click on **Cancel** to dismiss it
○ the 'Load ALL rows' message will pop up
- ○ click on **Cancel** to dismiss it
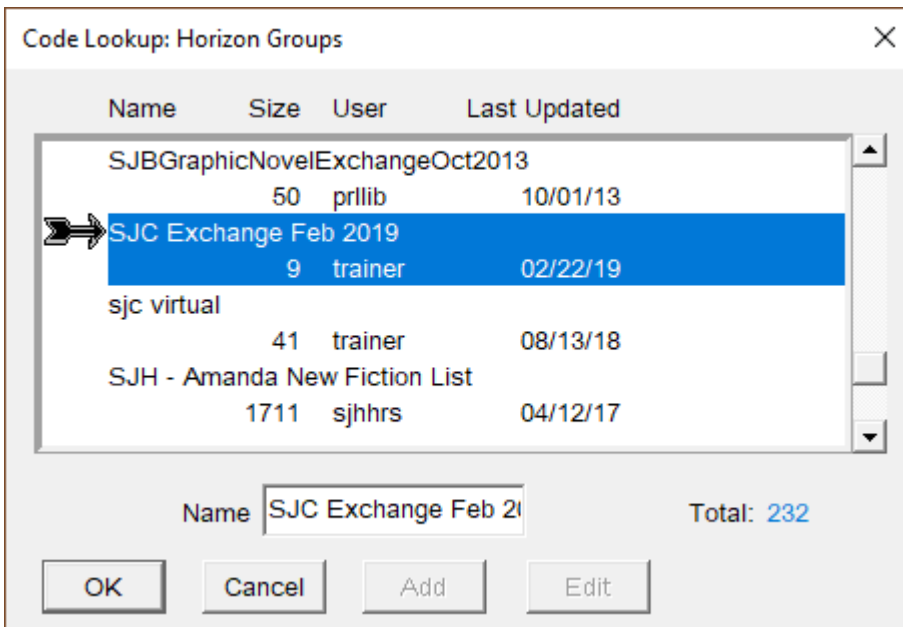○ from top menu select **Group > Retrieve Group**:

Click on **Groups** to bring up the list of all saved groups and find your group:

Click on **OK** to select, then click on **OK** again to retrieve the group.

The list of items will appear in the group editor window.

Editing Items in a Group

With a group opened you can edit any or all of the items:

- select the items to edit:

	Collection	Call No.	Author	Title
1. yfsc		FIC SAI	St. Crow, Lili.	Defiance.
2. afsc		FIC STE		Steampunk.
3. yf		FIC PIK	Pike, Christopher,	Thirst. No. 1.
4. yfsc		FIC SAI	St. Crow, Lili.	Strange angels.
5. yf		FIC MAB	Maberry, Jonathan.	Fire & ash.
6. af		FIC GAB	Gabaldon, Diana.	An echo in the bone.
7. yf		FIC NIX	Nix, Garth. 1963-	The Abhorsen trilogy.
8. yf		FIC PIK	Pike, Christopher,	The secret of Ka.
9. yfpb		FIC OPP	Oppel, Kenneth.	The live-forever machine.

Selection 2-3,6-8   Total: 9

Edit   New   Sort...   Display...

- click on **Edit**
  - the batch change warning will appear
  - the batch change window will open:

* Collection		
* Itype	b	Book (Adult & YA)
* Item Status	i	Checked In
Location	sjc	Testonia Public Library
CKI note		

When you have finished editing:

- click on **Save**
- click **on Close**

Deleting Items from a Group

> There is no direct way to delete items from a group, so we use a simple trick:

- open the group
- select only the items that we want to keep
- overwrite the group
    - by creating a group for the selected items using the same name

Here's how:

- *retrieve the group*
- select all items in the group
- *now deselect* the items you don't want to keep
- select from top menu **Group > Create Group**
    - the name of the group you are working on will appear in the pop-up
- click on **OK** to save
    - confirm that an existing group will be replaced:
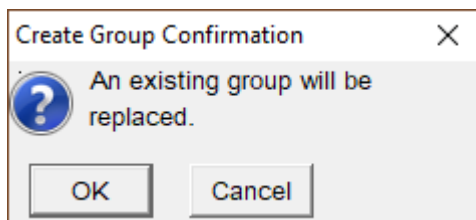
Adding Items to a Group

To add items to an existing group we need to:

- open the group
- scan in the items to be added
- overwrite the group
    - by creating a group for the selected items using the same name
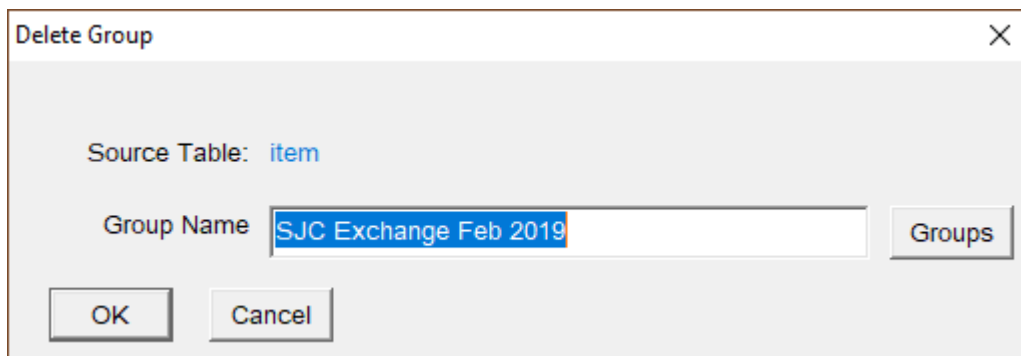
Here's how:

- *retrieve the group*
- open the Compound Search box:
    - press **[Alt] + [F2]** or select from top menu **File > Compound Search**
- select Append List

- scan the items to be added
- close the search box
- select all items in the group
- select from top menu **Group > Create Group**
  - the name of the group you are working on will appear in the pop-up
- click on **OK** to save
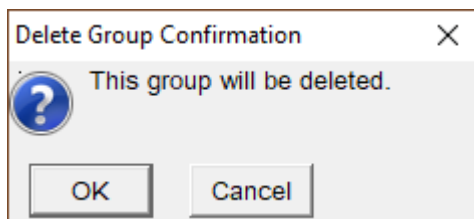 - confirm that an existing group will be replaced

Deleting a Group

To delete a group:

- click on the **Group Editor** button
  - dismiss the compound search box and the 'load all rows' pop-ups
- select from top menu **Group > Delete Group**
  - the pop-up appears:

Choose the correct group. Use the **Groups** button to find it.

Click on **OK**. A confirmation message will appear:

Click on **OK** and it's done.

Case Study: Using Groups When

Weeding

> This longer example explores how the group editor can help when performing a large weeding task. It's been included in the guidance because it brings together tasks from several areas of Horizon: how to search for individual items, how to edit them, how to perform complex searches for many items, how to edit many items and how to use groups.

> This example is only an illustration. It is not intended to show how weeding should be done, and divisions and sites may have their own policies. Speak with your supervisor before weeding large amounts of items.

Although it's ideal to weed the collections day-by-day, sometimes a collection needs reviewing and thinning to remove a large number of items at one time. We can use the group editor to help with this.

Suppose we need to weed the juvenile non-fiction section, and suppose this section is large. We can use Horizon to help us identify all the items that haven't been checked out during the last 5 years.

We can print that list, pull those items from the shelves and decide whether or not to weed them. In this case study, to keep things simple, we'll decide that all the items are going to be weeded.

Whilst shelf-pulling that we might notice that some items are not present and need to be set to trace. Rather than slowly changing each item's status one-at-a-time we can use the group functions to edit them as a batch.

So let's work through it.

Printing the List of Items to Weed

Use *Item Report* to get a list of all juvenile non-fiction not checked out during the last 5 years.

Suppose you are at Mount Pearl (AMP). Open Item Report and search for:

<table>
<tr><td></td><td align="right">Coll is 'jnf'</td></tr>
<tr><td></td><td align="right">AND</td></tr>
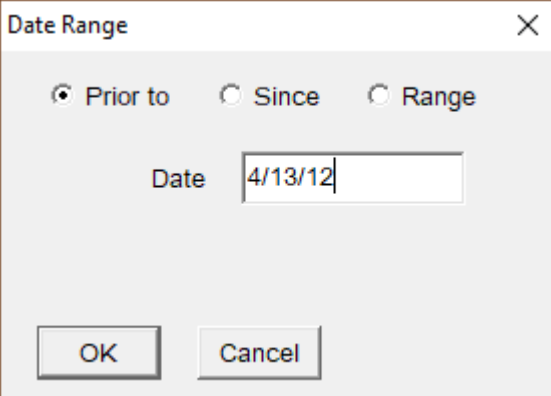<tr><td></td><td align="right">Location is 'amp'</td></tr>
<tr><td></td><td align="right">AND</td></tr>
<tr><td></td><td align="right">Last CKO Date is prior to '4/13/12'</td></tr>
</table>

The third part of the search – *Last CKO Date* – uses a date range. To enter that, Click on the **Date Range** button and a pop-up appears:

In this case we want items that haven't been checked out during the past 5 years, so select **Prior to** and enter a date.

Click on **OK** to submit the date range and the final search will look like this:

Click on **Search** to get the list of results.

The results will look something like this:

Coll/Status	Call No.	Loc	Author	Title
1. jnf i	821 LEA	amp	Lear, Edward,	A book of nonsense /
2. jnf l	591.5 AMO	amp	Amos, William	Life in ponds and streams /
3. jnf l	598.4 ISE	amp	Isenbart, Hans-	A duckling is born /
4. jnf i	821 LAW	amp	Lawrence, D. H.	Birds beasts, and the third thing : poems /
5. jnf i	821.08 KUS	amp	Kuskin, Karla.	Any me I want to be; poems. -
6. jnf i	822.3 MUL	amp	Mulherin,	Romeo and Juliet /
7. jnf i	745.54 JAN	amp	Janitch, Valerie.	All made from paper /

To make the list printable you need to deselect some columns from displaying.

Click on **Display** and leave just the first 4 columns highlighted:

Display Options

Choose columns to display

- Coll
- Call No.
- Author
- Title
- Copy
- Barcode
- Itype
- Status
- Loc

Display properties

Coll

Position 1

Width 8   characters

Label Coll

☐ Right justify

Code ⊙ code   ○ description

Value ○ short   ○ long

OK   Cancel

Click on **OK** to close the pop-up.

Then click on **Sort** and highlight all the columns to arrange the list. This will make shelf reading a lot easier!

Choose Sort Columns ✕

Choose up to 15 columns

```
Coll
Call No.
Author
Title
```

☐ Descending sort

OK   Cancel

Click on **OK** to close the pop-up.

The results are now sorted:

	Coll	Call No.	Author	Title
1.	jnf	001.9 SAN	San Souci,	The Loch Ness monster : opposing viewpoints /
2.	jnf	004.67 JAK	Jakubiak, David	A smart kid's guide to avoiding online predators
3.	jnf	027 SAW	Sawa, Maureen.	The library book : the story of libraires from
4.	jnf	031.02 MAS	Masoff, Joy,	Oh, yuck! : the encyclopedia of everything
5.	jnf	133.1 HAN	Hancock, Pat.	Haunted Canada 2 : true tales of terror /
6.	jnf	220 GOS		Gospel stories : for pleasure reading /
7.	jnf	232.9 PAT	Paterson,	The light of the world : the life of Jesus for
8.	jnf	263 HEI	Heiligman,	Celebrate Easter /
9.	jnf	292 SNE	Snelling, John,	Greek myths and legends /
10.	jnf	293 FIS	Fisher, Leonard	Gods and goddesses of the ancient Norse /
11.	jnf	294.6 BAR	Barrow, Joy,	Sikhism /
12.	jnf	296.4 GOL	Goldin, Barbara	The Passover journey : a Seder companion /
13.	jnf	296.4 KUS	Kuskin, Karla.	A great miracle happened there : a Chanukah
14.	jnf	297 ALH	Al Hoad, Abdul	Islam /
15.	jnf	297 PET	Petrini,	What makes me a Muslim? /
16.	jnf	297 VIC	Vickers,	The Baha'i faith /
17.	jnf	305.23 BER	Berry, Joy Wilt.	Let's talk about throwing tantrums /

Click on the **Print** button 🖨 to print the list.

> You're now ready to pull the items from the shelves for weeding.

Discarding the Weeded Items

> The quickest way to discard the weeded items is to scan them all in to the group editor and edit them as a batch.

The section *Using the Group Editor without Creating a Group* shows how to do that.

Setting Items not found to Trace

Any items that you don't find when weeding need to be set to a status of 'trace'.

Because the items aren't present this can't be done by scanning them in. You could search for each item one-by-one and change its status, but if there are a lot items that need to be changed then it's far quicker to do a search and then edit them as a group.

To edit the items as a group:

1. search for the list of items
2. save the list to a group
3. retrieve the group
4. change the status of the items to trace
5. delete the group

Let's go through each step in detail.

1. Search for the List of Items

First use Item Report to get the list of all juvenile non-fiction items not checked out during the last 5 years, *that also have a status of checked in*.

> This is almost identical to the *search that you did at the start*, but won't include the newly discarded items and won't include any non-circulating reference items.

Open Item Report and search for:

<div style="text-align:center">

Coll is *'jnf'*

AND

Location is *'amp'*

AND

Last CKO Date is prior to *'4/13/12'*
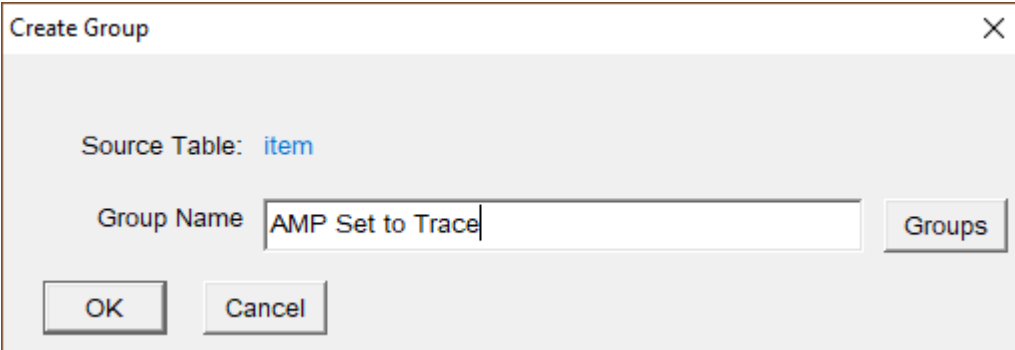
AND

Status is *'i'*

</div>

The results will look like this:

	Coll/Status	Call No.	Loc	Author	Title
⟹	1. jnf I	793.73 MAR	amp	Marzollo, Jean.	I spy fantasy : a book of picture riddles /
	2. jnf i	027 HIL	amp	Hill, Lee	Libraries take us far /
	3. jnf i	819.1 LES	amp	Lesynski, Loris.	Cabbagehead /
	4. jnf i	363.2 YOU	amp	Young, Beryl,	Charlie : a home child's life in Canada /
	5. jnf I	599 BUR	amp	Burnie, David.	Mammals /
	6. jnf I	581 BUR	amp	Burnie, David.	Plant /
	7. jnf I	220.9 HEY	amp	Heyer, Carol,	The Easter story /
	8. jnf i	821 POE	amp		Poems for the very young /
	9. jnf i	523.7 ASI	amp	Asimov, Isaac,	The sun and its secrets /

2. Save the List to a Group

All the items in the list need to be set to trace. But you cannot edit items from the Item Report window.

So, you need to save the list as a group and then retrieve it using the Group Editor:

- select all the items in the group
    - press **[Ctrl] + [A]** or select from top menu **Edit > Select All**
- select from top menu **Group > Save Group**
    - the **Create Group** pop-up appears:

> Give the group a meaningful name that begins with the name with the 3 letter code for your location.

Click on **OK** to save.

With the group saved you can now close the Item Report window.

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3. Retrieve the Group

> To be able to edit a group you need to be in the Group Editor:

- click on the **Group Editor** button to open it
    - dismiss the compound search box and 'load all rows' pop-ups
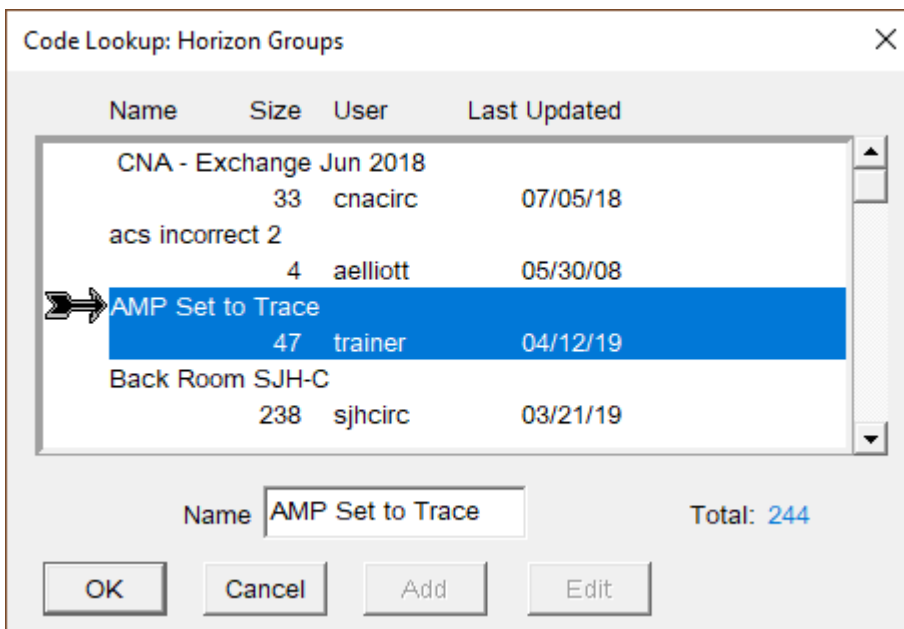- from top menu select **Group > Retrieve Group**:

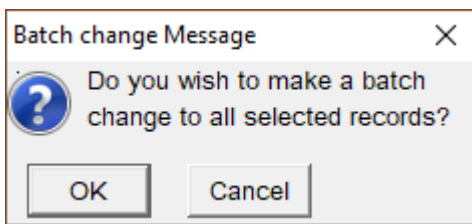Click on **Groups** to bring up the list of all saved groups and find your group:

Click on **OK** to select, then click on **OK** again to retrieve the group.

4. Change the Status of the Items to Trace

With the group retrieved:

- select all items in it
- click on **Edit**
  - the batch change warning message appears:

- click on **OK**
  - the batch change window will open

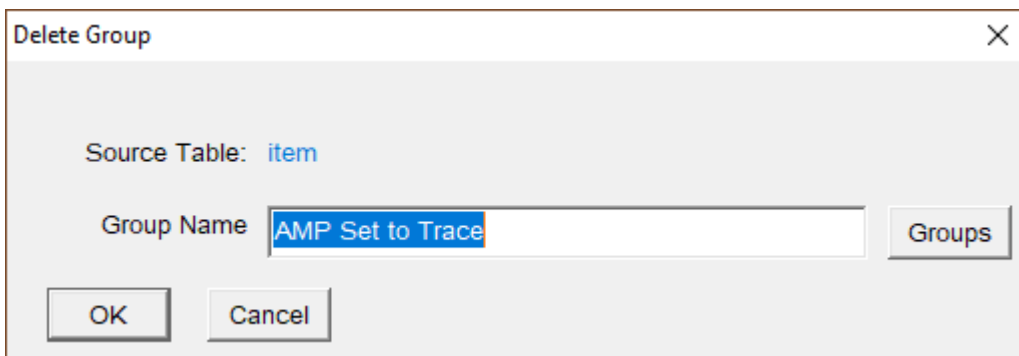Change the status to *trace*. This will apply to all the items:

Click on **Save** and it's done.

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5. Delete the Group

Finally, you need to delete the group you just made because it's no longer needed.

From top menu select **Group > Delete Group**. The pop-up appears:

Choose the correct group, using the **Groups** button to find it if necessary.

Click on **OK** and confirm the deletion.

> And that's it! The weeding is complete and the missing items have been set to trace.

If the missing items turn up in future then you can choose whether or not to discard them.

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