How do I move more than 9,000 LHRs to another branch or shelving location using a Record Work List?

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Applies to
WorldShare Record Manager

Answer
If you have a large number (for example. 25,000+) of LHRs you wish to change the shelving location or branch of, you can still use the Record Work Lists in Record Manager

The following process allows you to change 9,000 items at a time, updating their permanent shelving location (852 $c) and/or branch (852 $b) in the LHRs. You would just need to run the process several times to capture and change all your LHRs.

When you save items to a Record Work List you can only save 9,000 at a time, so these are the steps on how you would work & move more than 9,000 items, using this process.

Steps:
1. Conduct your search in Record Manager. Using the following:
   - Data type: Local Holding Records
   - Scope: My LHRs
   - Index: Branch/shelving Location
   - Branch: xxxx [select required]
   - Shelving: xxxx [select required]

2. Select Send to Record Work List > Select All Records. The first 9,000 of these will be sent to a Record Work List, you will need to select an existing Record Work List OR > Create the Work List and select Create and Send to List

3. Open Record Work Lists in Record Manager > LHR tab

4. Under Script Information, Select Edit Action > Select Base Script from the drop-down list

5. Under Script Name, Select Update Permanent Shelf Loc > Select Correct Branch name > Select the required New Permanent Shelving Location from the drop-down list
6. At the top of the screen, Select Actions > Edit > All Target records.

7. All these items in your Record Work List will now have been changed to the new shelving location.

8. Select all the Target Records in the Record Work List > by selecting the Top-box to select all targeted records.

9. Selected Action button above > Remove from Record Work List > Selected Target Records.

10. This removes all the records you have just changed from the Record Work List, ready for you to add a new set of items (up to 9,000) to this Work List.

11. Go back and re-run your search in Record Manager > to locate the next 9,000 items to change, repeating steps to add records to the Record Work List > running the Base Script to change their Shelving Location on each set of items.

12. Keep repeating the process until all of your records have been moved. For example, if you have 27,000 items, repeat the process 3 times to change all your items to the new shelving location.

Note: The script with 9,000 items takes about 1-5 minutes to run. We would recommend doing this change out of hours to reduce the impact on users.

When you have completed this shelving location, you can then move on to smaller shelving locations if needed.

Additional information

Bulk actions for local holdings records

Add LHRs to a work list

About LHR bulk actions