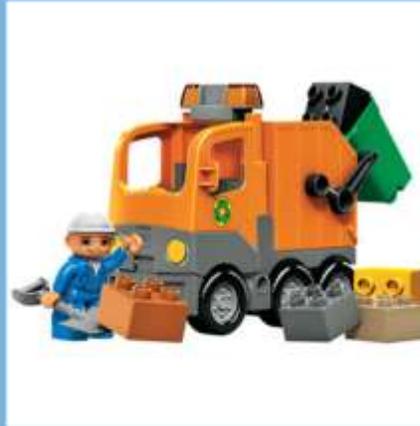


Database Tips & Tricks

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Why Someone Needs to Clean Up the Garbage

- Old codes
- Incorrect headings
- Typos
- Miscoded records
- Incorrect loan rules
- Lost notices



Ways to Find and Correct Errors

- Statistics
- Create Lists
- Bounced email messages
- Brute force



Cataloging



Shortcut Keys

- Create lists / Browse records
 - Next record - <ctrl>]
 - Previous record - <ctrl> [
- Summary of attached records
 - Next record - <ctrl> >
 - Previous record - <ctrl> <

Sierra Web Help
Search for: **Using Shortcut Keys**

Macros

- Program function keys
- Admin > Settings > Macros
- Use for repetitive tasks

Function Key	Macro Definition
F1	
F2	%ALT+g%d%h
F3	
F4	
F5	
F6	h[electronic resource]
F7	
F8	RE SERVED
F9	
F10	RE SERVED
F11	%ALT+u%%ALT+f%a
F12	%CTRL+SHIFT+e%%ALT+f%dy%ALT+q%%TAB%

Sierra Web Help
Search for: **Macros**

Global Update Macros

- Save complex change commands for future use
- File > Save/Load Local/Server

Sierra Web Help
Search for: **Saving Change
Commands in Global Update**



Save on your own PC for personal use or on the server for access by many users

Global Update Macros

The screenshot shows the Sierra software interface. The main window is titled 'Review Files' and contains a table with the following columns: ID, Name, Current Records, Max Records, Type, Status, Logic, and Created (datetime). The table lists various records, including LPL journals, LPL school collections, LPL All books, and several 'Load' records for specific book IDs. The 'Status' column shows 'empty' or 'complete', and the 'Created' column shows dates and times.

ID	Name	Current Records	Max Records	Type	Status	Logic	Created (datetime)
61		0	1000		empty		
62		0	100000		empty		
64	LPL journals with output book	388	10000	2	complete	ylsout_	09-12-2010 09:46AM
65	LPL school collection (overseas)	123	10000	1	complete	ylsout_	05-21-2010 11:21AM
66		0	10000		empty		
67		0	10000		empty		
68		0	10000		empty		
69		0	10000		empty		
70		0	10000		empty		
71	LPL All books	5270	10000	1	complete	ylsout_	08-13-2010 01:21PM
72		0	10000		empty		
73	Load: inserted records for Aug_A004_A0_289	10000	10000	0	complete	Aprtime	09-05-2010 03:53PM
74	Load: inserted records for Aug_ebooks.m_349	10000	10000	0	complete	Aprtime	09-05-2010 03:54PM
75	Load: inserted records for Aug_ebooks.m_350	10000	10000	0	complete	Aprtime	09-05-2010 03:54PM
76	Load: inserted records for Aug_A005_M6_122	10000	10000	0	complete	Aprtime	09-05-2010 03:54PM
77		0	10000		empty		
78		0	10000		empty		
79		0	10000		empty		
80	NO List: BOWEN, DAVID X03-10-09 to S_15	5000	5000	1	complete	overack	09-04-2010 12:31PM
81		0	5000		empty		
82		0	5000		empty		
83		0	5000		empty		
84		0	5000		empty		
85		0	5000		empty		
86		0	5000		empty		
87	Load: Overlaid records for LE-09-05-03.m_3	5000	5000	0	complete	asky	09-05-2010 11:36AM
87	Load: inserted records for LE-08-05-03.m_13	5000	5000	0	complete	asky	09-05-2010 11:36AM
88		0	5000		empty		

View movie to see how this is set up

Statistics Field Report

- Run field stats report
- Find blank/bad values

Select Report: Rodman Public Library
Report for the Unassigned
Range - 61000000-1788366
459965 records were processed, 331681 records had been

Code	Missing	Record Co.	COPIES
11	Bad Code	31	4
1	LAST COPY W/D	214344	328412
8	SUPPRESS IMG	8	8
2	SOX SUPPRESS	243822	4218
Totals:		459965	331681

Select Report: Rodman Public Library
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Totals:		459965	331681

Statistics function helpful for finding the health of your database

Finding “Bad” Codes

- Create List
 - Field doesn't equal all valid values



To find the actual records, go to create lists

Search the field for values that aren't equal to all the valid codes. Use enhanced search to streamline the search. More on that later.

Statistics Cross-Tab Report

- Create List
- Run cross-tab report
- Find miscoded fixed fields
 - Regular books coded as paperbacks
 - Audio books coded as music CDs
 - DVDs coded as videocassettes
 - BIB vs. ITEM location codes

Powerful tool for finding hidden mistakes

Select Report:		Rodman Public Library			
IUSE3		Report for the Catd Items cross tab - Jan 2015			
LYRCIRC		Review File: Catd Items Jan 2015 (1456) (ITEM)			
# OVERDUES		1456 records were processed. (0 records had been deleted.)			
# RENEWALS					
PRICE					
Record Count					
TOT CHECKOUT					
TOT RENEW					
YTDCIRC					
Code	Meaning	0 Regular Book	2 Paperback Book	3 Reference Book	6 Toys
maq	Main Adult Oversize Q	12	0	0	0
maq	Main Adult Oversize Q Bio	1	0	0	0
mar	Main Adult Reference	1	0	6	0
marga	Main Adult Hist Genealogy	1	0	0	0
marof	Main Adult Ref Office	51	0	0	0
marr	Main Ad Ready Reference	0	0	4	0
masd	Main Adult Book on CD	0	0	0	0
masf	Main Adult Sci-Fi	1	0	0	0
masfd	Main Adult Sci-Fi DVD	0	0	0	0
mawes	Main Adult Western	3	0	0	0
mc	Main Child Fiction	9	0	0	0
mcdb	Main Child Board Books	1	0	0	0
mcbio	Main Child Biography	3	0	0	0
mccd	Main Child Compact Disc	0	0	0	0
mcchd	Main Children's DVD	0	0	0	0
mcez	Main Child Easy	11	0	0	0
mcgra	Main Child Graphic Novel	5	0	0	0
mchol	Main Child Holiday Books	5	0	0	0
mci	Main Child Fictoe 3-4	2	0	0	0
mcig	Main Child Fict 3-4 Over	1	0	0	0
mcnf	Main Children's	31	0	0	0
mool	Main Children's Office	3	0	0	0
mcpbk	Main Child Paperback	2	1	0	0
mcpcq	Main Child Pic book Oversize	11	0	0	0
mcpic	Main Child Picture Book	15	0	0	0

Record count report: locations on vertical and itypes on horizontal

Reference book coded as regular book

Paperbacks coded as regular books

Boolean Search

Review File Name: boo boos

Store Record Type: ITEM I

Review: Review file: Catd Items Jan 2015 (1456) (ITEM)

Term	Operator	Type	Field	Condition	Value A	Value B
1			ILOCATION	equal to	mar	
2	AND	ITEM	I TYPE	equal to	0	

ITEM ILOCATION equal to "mar " AND ITEM I TYPE equal to "0"

Group
Ungroup
Insert Line
Append Line
Delete
Clear All

Create list based on errors found in cross-tab report

Bib Record - #15653638

File Edit View Go Tools Window Help

Insert Save Save As View Edit Summary Export Print Close

b1411088x

AUTHOR Carangelo, Lori
 TITLE The adoption & donor conception factbook : the most comprehensive source of U.S. & global data on the invisible families of adoption, foster care, & donor conception / Lori Carangelo
 CALL # 382.8298 C261

Summary Record

Record #15653638

Item Level Holds 0

Bib Level Holds 0

Not checked out
 #15653638 Last Updated: 01-22-2015 Created: 01-15-2015 Revisions: 4

ICODE1		RVGA	--	LOCATION	mar Main Adult Reference
DISPLAY		IN LOC	0	LOANRULE	0
I TYPE	0 Regular Book	RENEWALS	0	STATUS	o AVAILAB
PRICE	\$26.99	# OVERDUE	0	INTL USE	0
OUT DATE	-- : --	DUPLICATE	--	COPY USE	0
OUT LOC	0	RUSE3	0	MESSAGE	NO MESSAGE
DOE	--	RECAL DATE	--	OPACMSG	n [NEW ITEM]
PATRON#	0	TOT CHECKOUT	0	YFDCIRC	0
LPATRON	0	TOT RENEW	0	LYWCIRC	0
LCHGN	-- : --	LOUTDATE	-- : --		

LABEL R

BARCODE 38212095940844

#15653638 Not checked out Edit Mode (RIS)

Cleanup based on ilocation often resulting from using the incorrect item template when creating item records.

Several other errors found when inspecting record
 Status should be "o"
 OPACMSG should be "--"

Browse Query

- Alternative to Create Lists for quick lookups
- Search for patrons by phone # or email
- Access through Tools > Browse Query
 - Circulation – Search/Holds
 - Cataloging

Sierra Web Help
Search for: **Retrieving Records with
Browse Query**

Use Browse Query when results don't need to be stored

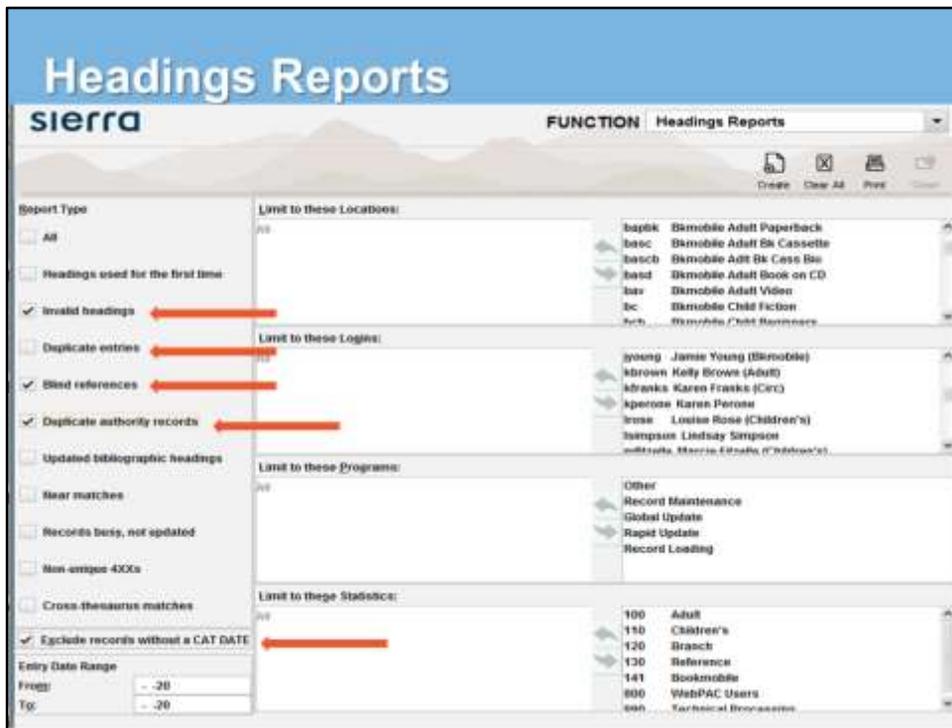
Import Errors

- Diacritics or copyright/publisher symbols
 - 264 4 |cA2013
 - Should display as ©2013
- Bad location codes
 - BLOCATION = zzzzz

These errors often occur when importing records through Z39.50
Caused when the other site uses a different encoding scheme
Bad locations occur when incoming code is missing from your site

Headings Reports

- Finding duplicate records
- Misspelled headings
- Names missing dates



If no other headings reports are run, select these:

- Invalid headings
- Blind references
- Duplicate authorities
- and probably Duplicate entries

Headings Reports

sierra FUNCTION Headings Reports

#	Type	Entry	Call Date	Function	Group	Login	Entry Date
8	Invalid headings	Field: a0001 \$f\$art, Alison Indexed as AUIBOR: Artt alison Correct Heading is: colly jr alison hart From: b16590663 Hart, Alison Murphy, Gold Rush Dog [electronic resource] / Alison Hart	Sep 8, 2016	marc2doc	800	midstat	Sep 8, 2016
9	Invalid headings	Field: a0001 \$afce, Vanilla Indexed as AUIBOR: ice vanilla Correct Heading is: vanilla ice ❌ From: b16802335 Ice, Vanilla I love the 90's presents: the last great decade of music [electronic resource] / Various Artists	Sep 14, 2016	marc2doc	800	apertum	Sep 14, 2016
10	Invalid headings	Field: b7001 \$kKrosoczka, Jarrett J., \$ilustrator Indexed as AUIBOR: krosoczka jarrett / Correct Heading is: krosoczka jarrett From: b16598018 Prei, Erica S. Totally Tardy Marty [electronic resource] / by Erica S. Prei, illustrated by Jarrett J. Krosoczka	Sep 8, 2016	marc2doc	800	midstat	Sep 8, 2016
11	Invalid headings	Field: b7001 \$gRay, Sugar Indexed as AUIBOR: ray sugar Correct Heading is: sugar ray From: b16802335 Ice, Vanilla I love the 90's presents: the last great decade of music [electronic resource] / Various Artists	Sep 14, 2016	marc2doc	800	apertum	Sep 14, 2016
12	Invalid headings	Field: b7001 \$f\$on Desai, Anne Sofie Indexed as AUIBOR: von otter anne sofie Correct Heading is: otter anne sofie von From: b16802540 Desplai, Alexander Firenze from jenkins (original motion picture soundtrack) [electronic resource] / Alexander Desplai	Sep 14, 2016	marc2doc	800	apertum	Sep 14, 2016
13	Invalid headings	Field: a0001 \$aZia, Fabiana Indexed as AUIBOR: zie fabiana Correct Heading is: zie f fabiana	Sep 8, 2016	marc2doc	800	midstat	Sep 8, 2016

Example of incorrect heading in bib record – Ice, Vanilla ... really??

Records That Have Lost Their Way

- Bib records without a title/245
- Bib records without a call number
- Patron records with no name
- Orphaned bib records
- Deserted records

Missing Fields



- Search for something that allows “not exist” as the condition, such as HOLD
- Don't run the search
- Change the field to barcode, or title, or call #
- Run the search

lib Record - 112992768 - b11608845

File Edit View Go Tools Window Help

Insert Save View Edit Summary Export Print Close

b11608845

AUTHOR: Gottman, John Mordechai

TITLE: The relationship cure : a five-step guide for building better connections with family, friends, and lovers / John M. Gottman and Joan DeClaire

CALL # 158.2 G686

Summary

Record

Record 112992768

Item-Level Holds 0

lib-Level Holds 0

Checked out on 04-18-2019 05:00PM to 20212061240388 due on 05-30-2019
2 renewals 4 overdues, last on 07-24-2019 08:13AM

112992768 Last Updated: 07-24-2019 Created: 06-05-2001 Revisions: 122

KCODE1	0	WVDA	08-07-2019	LOCATION	main Rodman Main Adult
DISPLAY		IN LOC	100	LOANRULE	1
ITYPE	0 Regular Book	# RENEWALS	2	STATUS	0 LONG OVERDUE
PRICE	\$24.00	# OVERDUE	4	WTL USE	0
OUT DATE	04-18-2019 05:00PM	DUPLICATE	07-24-2019	COPY USE	0
OUT LOC	100	USE3	0	MESSAGE	NO MESSAGE
DUE	05-30-2019	RECAL DATE		OPACMSG	
PATHON#	1071548	TOT CHKOUT	21	YTDCRC	1
LPATRON#	0	TOT RENEW	8	LYRCRC	0
LCHKW	18-02-2017 04:20PM	LOUTDATE	09-01-2017 08:49AM	Item Agency	1 Rodman

MESSAGE: Send to cataloging when returned. Barcode missing from item record 7.19.19 ksp

112992768 Checked out on 04-18-2019 05:00PM to 20212061240388 due on 05-30-2019

Edit Show (HS)

Here is a resulting “no barcode” record

Lost and Paid/Long Overdue

b10000355

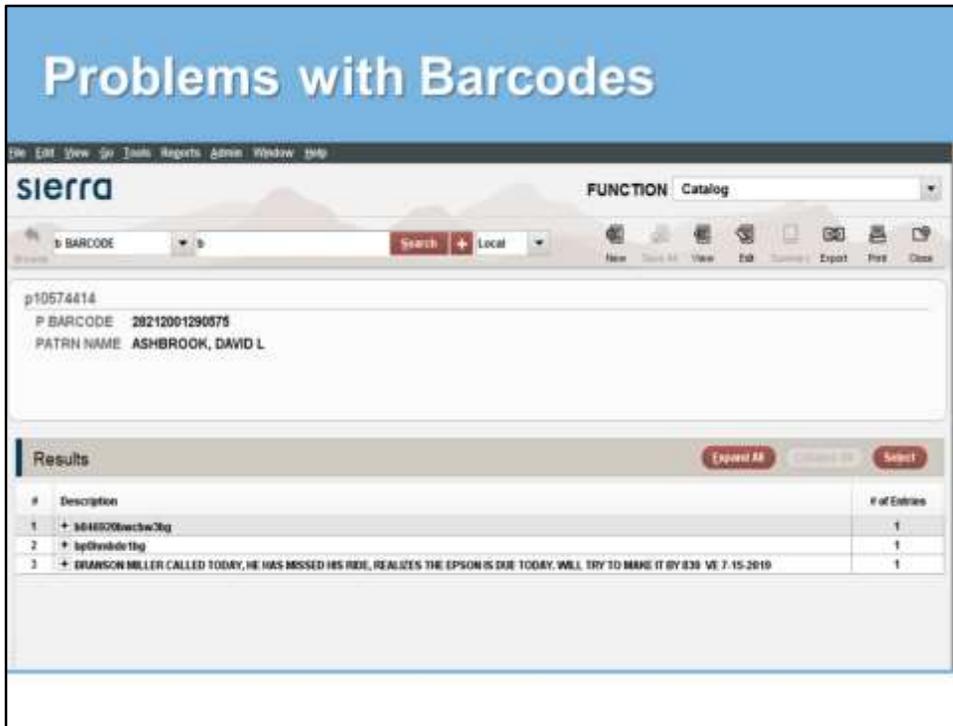
AUTHOR **Spencer, LaVyrle**
 TITLE **The endearment [sound recording] / LaVyrle Spencer**
 CALL # **\$**
 LOCATIONS **ladul**
 I IIR MAR **Abridead**

Create BIB list

- Item Status = \$
- AND Item Status != \$

Summary		Record	
Recent	(10000677)		
Item Level Holds	0		
BIB Level Holds	0		
<p><i>Not checked out and LOST AND PAID</i></p> <p>10000677 Last Updated: 01-02-2013 Created: 10-19-1994 Revisions: 181</p>			
DISPLAY	n	SUPPRESSION	W LOC 990
LOANRULE	0		
ITYPE	7 Sound Cassette	# RENEWALS	0
STATUS	\$ LOST AND PAID		
PRICE	\$15.95	# OVERDUE	0
INTL USE	0		
OUT DATE	--	DDUE DATE	--
COPY USE	0		
OUT LOC	120	#ISE3	0
MESSAGE	# ABC-GIVE TO JOANN		
DUE	--	RECAL DATE	--
DPACMSG			
PATRON#	0	TOT CHKOUT	45
YEDCIRC	0		
LPATRON	1045298	TOT RENEW	0
LYRCIRC	0		
LCHKIN	03-16-2004 02:14PM	LOUTDATE	08-15-2003 07:00PM
BARCODE	3821200000676		
MESSAGE	Check for 2 cassettes		
NOTE	Tue Mar 16 2004: \$23.25 paid by .p1045298		

Search strategy for bibs with only one item that is lost & paid with no other attachments



Search for barcodes that are out of range to find oddly coded fields
 Run regular search using letters of numbers out of your range

Orphaned Bib Records

Orphaned Bib Records

Store Record Type: BIBLIOGRAPHIC b

Range: Start: 2/1/2000 Stop: 2/1/2010

Classic

Term	Operator	Type	Field	Condition	Value A	Value B
1		BIBLIOGRAPHIC LINKED REC		not exist to	ORDER	
2	AND	BIBLIOGRAPHIC LINKED REC		not exist to	CHECKIN	
3	AND	BIBLIOGRAPHIC LINKED REC		not exist to	ITEM	
4	AND	BIBLIOGRAPHIC BLOCATION		not equal to	www	
5	AND	BIBLIOGRAPHIC MAT TYPE		not equal to	w	

BIBLIOGRAPHIC LINKED REC not exist to ORDER AND BIBLIOGRAPHIC LINKED REC not exist to CHECKIN AND BIBLIOGRAPHIC LINKED REC not exist to ITEM AND BIBLIOGRAPHIC BLOCATION not equal to "www" AND BIBLIOGRAPHIC MAT TYPE not equal to "w"

OK

Bib records with nothing attached to them. Use ^ for the linked record field

No Attached Records

Boolean Review File:bibs with nothing attached

ALL Edit Remove Restore Desktop Close

All	Record	Description
1	b13468600	Americas writers. Supplement 1 [ebook] ; Jay Paris, editor
2	b13468612	Americas writers. Supplement 2 [ebook] ; Jay Paris, editor
3	b13468640	Americas writers. Supplement 3 [ebook] ; Jay Paris, editor
4	b13006774	Moodlay [downloadable video]
5	b13007791	Small town munter songs [downloadable video]
6	b13008035	The retrievers [downloadable video]
7	b13016706	The kitchen [downloadable video]
8	b13077052	Secret pizza party [downloadable video]
9	b14035492	Haymarket Square Riot [ebook]
10	b14036629	Graveyard shift [downloadable video] ; Paramount Pictures presents a Larry Sugar production ; a Ralph S. Segleton film
11	b14100842	Man with the violin [downloadable video] ; author, Kathy Silson ; illustrator, Deana Petrick
12	b14121008	Rodney Yee's ultimate power yoga [downloadable video]
13	b14136818	Nothing [downloadable video]
14	b14187127	High school musical [downloadable video] : the concert
15	b14424617	Mo, Elote [downloadable video] ; EDT Entertainment presents in association with Handmade Films ; written by Ken Lipman
16	b15012309	The Louisville Herald [newspaper]
17	b16838691	Because you're mine [downloadable audiobook] ; Colleen Coble
18	b1683842x	Augustown : a novel / Kai Miller
19	b16892763	William McKinley Presidential Library & Museum pass
20	b17065591	Goodnight, Dandel Tiger / written by Angela C. Santomero ; poses and layouts by Geri Garwood
21	b17067364	Typhoon fury : a novel of the Oregon Men / Clive Cussler and Boyd Morrison
22	b17219541	Rainy Day Unicorn Fan : A Phoebe and Her Unicorn Puzzle Book
23	b17324585	Amelia Bedelia gets a break / by Herman Parish ; pictures by Lynne Avril
24	b17730569	Bleach. 7th Friend : story and art by Tite Kubo ; translation: Joe Yamazaki
25	b17838125	Stratton: finance [magazine]

Browse the list for errors.

Ebooks/Downloadable – miscoded locations and/or material type

Couple others here that are questionable

(Next slide has details)

No Attached Records – Not Cat'd

b1683642x Last Updated: 06-01-2017 Created: 03-23-2017 Revisions: 3

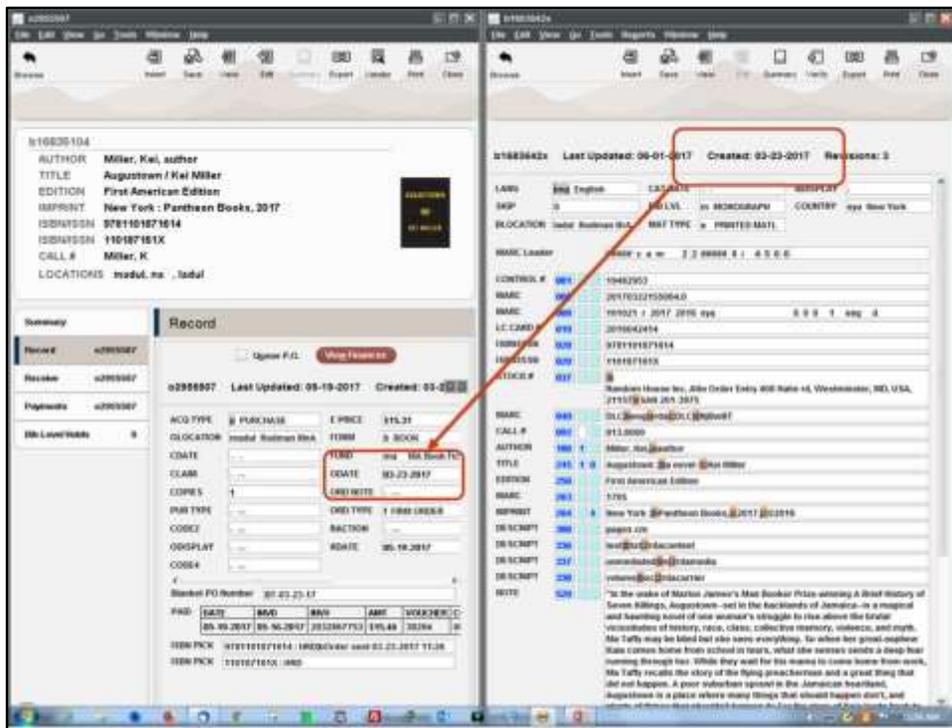
LANG	eng English	CAT DATE	..	BDSPLAY	
SKIP	0	DIR LVL	m BROWZGRAPH	COUNTRY	nyu New York
BLOCATION	ladsl Rodman BR	MAT TYPE	a PRINTED MATL		

MARC Leader 00000 c a m 2 2 0000 8 i 4 5 0 0

CONTROL #	001	19482953
MARC	005	20170322155004.0
MARC	008	161021 r 2017 2016 nyu 0 0 0 t eng d
LC CARD #	010	2016042414
ISBN/ISSN	020	9781101871614
ISBN/ISSN	020	110187161X
STOCK #	037	Random House Inc, Attn Order Entry 400 Hahn rd, Westminster, MD, USA, 21157 SAN 201-3975
MARC	040	OLC eng anta DLC j BwBT
CALL #	092	813.6090
AUTHOR	100 1	Miller, Kei author
TITLE	245 1 0	Augustown :a novel /Kei Miller
EDITION	250	First American Edition
MARC	263	1705
IMPRINT	264 1	New York :Pantheon Books, c2017, c2016
DESCRIPT	300	pages cm
DESCRIPT	336	text rt tdacontent
DESCRIPT	337	unmediated n tdamedia
DESCRIPT	338	volume nc tdacarrrier
NOTE	520	"In the wake of Marlon James's Man Booker Prize-winning A Brief History of Seven Killings, Augustown—set in the backlands of Jamaica—tells a magical and haunting novel of one woman's struggle to rise above the brutal vicissitudes of history, race, class, collective memory, violence, and myth. Ma Taffy may be blind but she sees everything. So when her great nephew Kale comes home from school in tears, she senses sends a deep fear running through her. While they wait for his mama to come home from work, Ma Taffy recalls the story o

b1683642x Edit Mode (OVR)

First thing we see is no cat date. Next we do a title search...



Compare the created date of the bib with no cat date to the order date in the record that has a cat date

We surmise that the record wasn't correctly overlaid or deleted when transferring the order record to the cataloged record

No Attached Records – Hold Remaining

The screenshot shows a library catalog record for the title 'Goodnight, Daniel Tiger'. The record includes the following details:

- CALL #: b17066591
- CALL #: Santomero, A
- AUTHOR: Santomero, Angela C
- TITLE: Goodnight, Daniel Tiger / written by Angela C. Santomero ; poses and layouts by Gord Garwood

The record is displayed in a 'Summary' view. A red box highlights the 'Bib Level Hold' field, which shows a value of '1'. Below the summary, the text 'NO RECORDS OF THIS TYPE' is visible.

In this case, the bib record couldn't be deleted during a batch withdrawal because there is still a hold on the title

Miscoded Electronic Records

Boolean Review File:bibs with nothing attached



	Record#	Description
1	b10446690	The rise and fall of the Confederate government / by Jefferson Davis ; foreword by Bob L. Wiley
2	b11184425	The spell / Bill Moyers
3	b12296899	I want a dog [videorecording] : a production of the National Film Board of Canada ; Marcy Page, producer ; directed ...
4	b12789524	The Gale encyclopedia of America [electronic resource] / Jacqueline L. Longo, project editor
5	b13146894	Chrysanthemum [avid videorecording] : and more Kevin Henkes stories / (produced by Weston Woods)
6	b13434731	Lake Tahoe [electronic resource] : Cinemastera presenta ; dirigido por Fernando Eimbcke ; producida por Christian...
7	b13434743	Squeeze play [electronic resource] / Jane Laavy ; Anna Fields
8	b13434755	Beyond the outposts [electronic resource] / Max Brand
9	b13434767	The captured [electronic resource] : a true story of abduction by Indians on the Texas frontier / Scott Zesch
10	b13434779	Treasure Island [electronic resource] / Robert Louis Stevenson, Frederick Davidson
11	b13434780	Elsie Dismore [electronic resource] / Martha Foley
12	b13434792	The patchwork girl of Oz [electronic resource] / L. Frank Baum
13	b13434809	Simple steps [electronic resource] : [10 weeks to getting control of your life] / Lisa Lelas, Linda McClintock, and B...
14	b13434810	Anne of Avonlea [electronic resource] / L.M. Montgomery
15	b13439546	The borrowers aloft : with the street tale, Poor Stainless / Mary Norton ; illustrated by Beth and Joe Krush
16	b13549492	Alice in Wonderland [videorecording] / Walt Disney Pictures presents : a Roth Films production, a Team Todd prod...
17	b1358490x	Foul play [electronic resource] / Janet Evanovich
18	b13584911	Circle of friends [electronic resource] / Maeve Binchy
19	b13584923	First grave on the right [electronic resource] / Darynda Jones
20	b13584935	What it was [electronic resource] / George Pelecanos
21	b13584947	Second grave on the left [electronic resource] / Darynda Jones
22	b13584958	An Amish orphan [electronic resource] : the in Lancaster County / Beth Wiseman, Kathleen Collins & Barbara Ca...

Depending on how coded, create list of mat type for downloadables or location for web resources

Browse list for errors and fix them

Order Records



Orders That Never Arrive

- Run list on order status = 1 (on hold)
- Happen if no fund or location code are in the imported order
- Order status 1 records cannot be queued for a po

Update order status to "o" to queue po

Archiving/Deleting Old Orders

- Create List
 - ORDER RDATE between Date1 and Date2
 - ORDER STATUS equal to "a"
 - BIB CAT DATE not equal to " - - "
- Data Exchange > Process Purged RECORDS
 - Create file
 - Put the file to PC to save (optional)
 - Execute the file
 - DELETE records

Sierra Web Help
Search for: **Archiving Purged Order
Records**

bib records that need to be withdrawn may have order records attached to them
Create an order list from the bib list and purge/delete the orders to delete the bibs

Item Records



Long Overdue Items

- Create list of long overdue items
item status = n AND due date WITHIN
01/01/1999 and 12/31/2005
- Export data if full details will be needed
- Run batch checkin
- Rapid update to suppress records
- Delete records from catalog

Never going to see these items again

Do not use due date < - this will include all available items because their due date is blank

Notes on Batch Check-in

- Available in Admin Corner or text-based
- Will not transfer overdue fines
- Will not remove or reduce bills
- It will add charges to patron's record
- Will not activate holds
- Will not prompt to put item in transit
- Items will display "Available" after batch check-in

Sierra Web Help
Search for: **Batch Check-In**

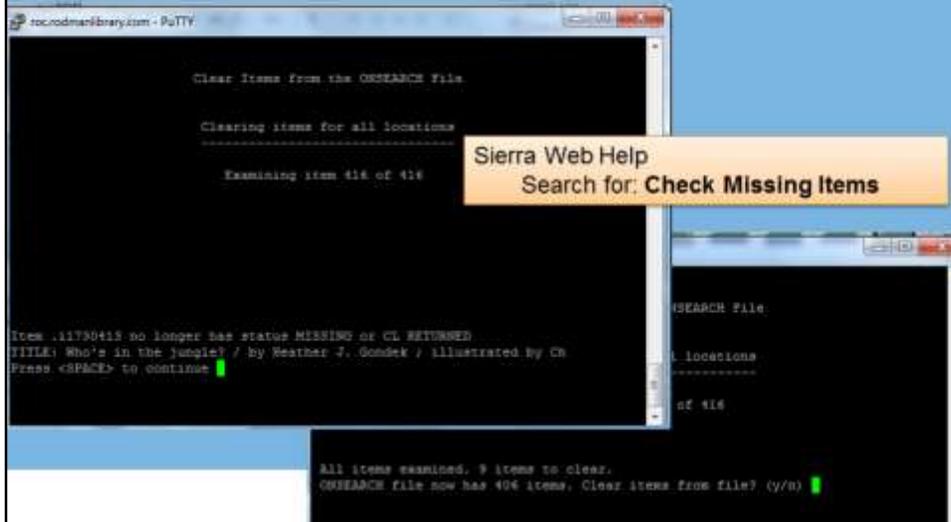
Since the items will display "available" you will need to suppress or delete them ASAP

Missing Items

- Run missing items check
- Complete inventory
- Search for long "In Transit" status

Missing Items Check

- Admin Corner
- C - CIRCULATION > M - Check MISSING items



After clearing using this function, go to create lists and copy the “missing” file from hidden files to active so you can list them and check shelves

Inventory Cleanup

RPL missing maa in inventory 2019

Store Record Type:

Range: Stop:

Classic

Enhanced

JSON

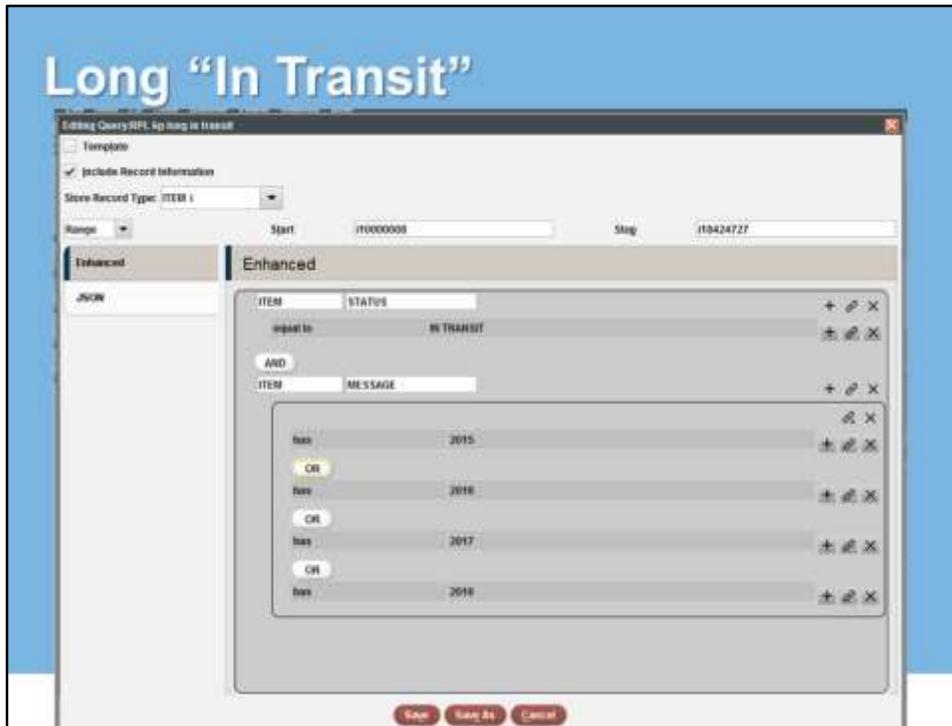
Term	Operator	Type	Field	Condition	Value A	Value B
1	(ITEM	LOCATION	equal to	maa	
2	OR	ITEM	LOCATION	equal to	masd)
3	AND	ITEM	INVA	less than	05-01-2019	- -
4	AND	ITEM	CREATED	less than	05-01-2019	- -

Sorting Fields

Line	Type	Field
1	ITEM	LOCATION
2	BIBLIOGRAPHIC	CALL #
3	BIBLIOGRAPHIC	TITLE

OK

After inventorying a section, create a list of all those items not inventoried
 Update the inventory date and remove found items from your list
 Rapid up the list after checking shelves with missing status and a note that the item was missing during the inventory with a date



Either items didn't get checked in at the right location correctly or never got returned to the right location

The item message field will have a date in it for when it was put in transit

Long "In Transit"

File Edit View Go Tools Window Help

Print Save New Edit Settings Export Print Close

b17486373

AUTHOR Krajinik, Elizabeth, author
TITLE Meghan Markle : American royal / Elizabeth Krajinik
CALL # M697mk
LOCATIONS mchl, behl, lchl

Summary Record

Barcode 18256459

Item Level Holds 0

HB Level Holds 0

Not checked out and IN TRANSIT

18256459 Last Updated: 12-18-2018 Created: 12-05-2018 Revisions: 3

ICCODEY	WVSA	LOCATION	bcbe, hsdman, bldmbls, chl, dlography
DISPLAY	RELOC	LDARNING	
ITYPE	# RENEWALS	STATUS	IN TRANSIT
PRICE	# OVERDUE	RTL USE	
OUT DATE	DUPLICATE	COPY USE	
OUT LOC	RISEC	MESSAGE	NO MESSAGE
DUE	RECAL DATE	OPACMSG	
PATRONP	TOT CHECKOUT	YTDRC	
LPATRON	TOT RENEW	LYNRRC	
LCRON	LDUTDATE	Item Agency	Redman

LABEL BRIGAM (DUPLICATE OF BLS) B

BARCODE 18256459

REMARKS Type Dec 18 2018 03:02PM: IN TRANSIT from mmlmk to bcbe

18256459: Not checked out and IN TRANSIT

Full Mode (MS)

Check shelves at both locations

Check location served table if it shouldn't have been put in transit

Clear Hold Shelf

- Not everything clears
- Multi locations
- Run every day for your location
- Run entire at least once every three months

Sierra Web Help

Search for: **Clearing Defunct Holds**

Enhanced Create Lists Search

- Useful for searches for many values or barcodes
- Program scanner to automatically key the +
- Use "in" as operator

Sierra Web Help
Search for: **Using the Enhanced Query Builder**

Patron Records

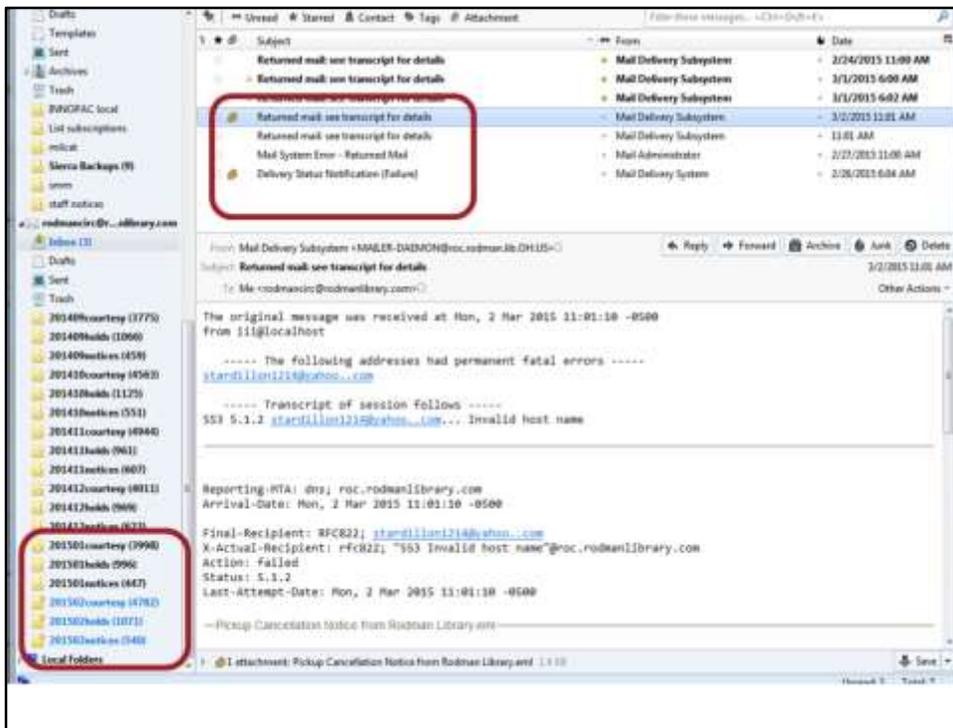


Patron Email Address Errors

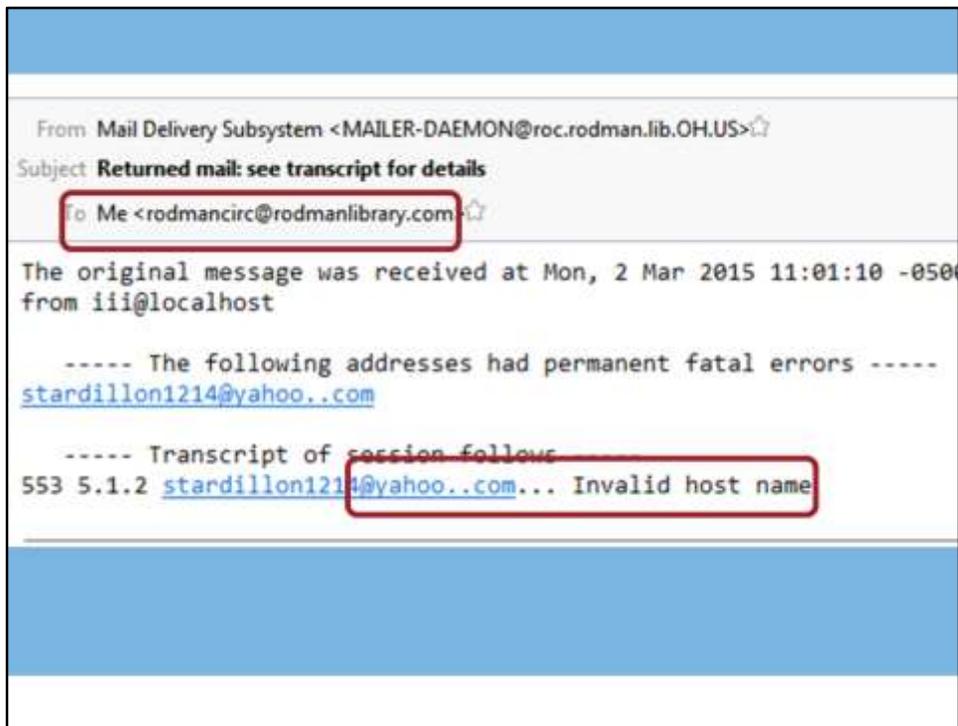
- Address without @
- Spelling errors in domain name
- Email bounces

- Use:
 - Create Lists
 - CC: for bounces

Sierra Web Help
Search for: **Header Elements in
System-Generated Email**



Setup the cc return address in circ options in admin corner
 Use filters in your email client to sort email copies by type



Mark email address as invalid in patron record (change to a note field) and add message to patron record to ask for correction at next checkout

Patron Address Errors

TOT CHKOUT	11	CL RTRND	0
TOT RENWAL	5	MONEY OWED	\$0.00
PATRN NAME			
ADDRESS			
ADDRESS2	ALLIANCE OH 44601		
	ALLIANCE-SEBRING RD		
	ALLIANCE OH 44601		
TELEPHONE			
TELEPHONE2			
P BARCODE			
SCHOOL DST	ALLIANCE		

p10659742

Typing the same info many times can lead to errors

How to Solve – Substitution Phrases

A > ADDITIONAL system functions

A > ALTER system parameters

S > SYSTEM Codes

O > Set System OPTIONS

D > Database maintenance

18 – Substitution Phrases

Sierra Web Help

Search for: **Substitution Phrases**

Substitution phrases are similar to macros and can be set up for system-wide use

How to Solve – Substitution Phrases

22 > ρ AEL ALLIANCE EARLY LEARNING

23 > ρ ALLI ALLIANCE OH 44601

24 > ρ AMS ALLIANCE MIDDLE SCHOOL

25 > ρ FRA FRANKLIN HEAD START

26 > ρ LEX LEXINGTON ELEMENTARY

27 > ρ MAR MARLBORO ELEMENTARY

28 > ρ MMS MARLINGTON MIDDLE SCHOOL

Substitution Phrase in Use

New PATRON Last Updated: 03-23-2015 Created: 03-23-2015 Revisions: 0

EXP DATE -- CUR CHKOUT 0 B
COUNTY s STARK BIRTH DATE -- C

Insert a non-MARC field

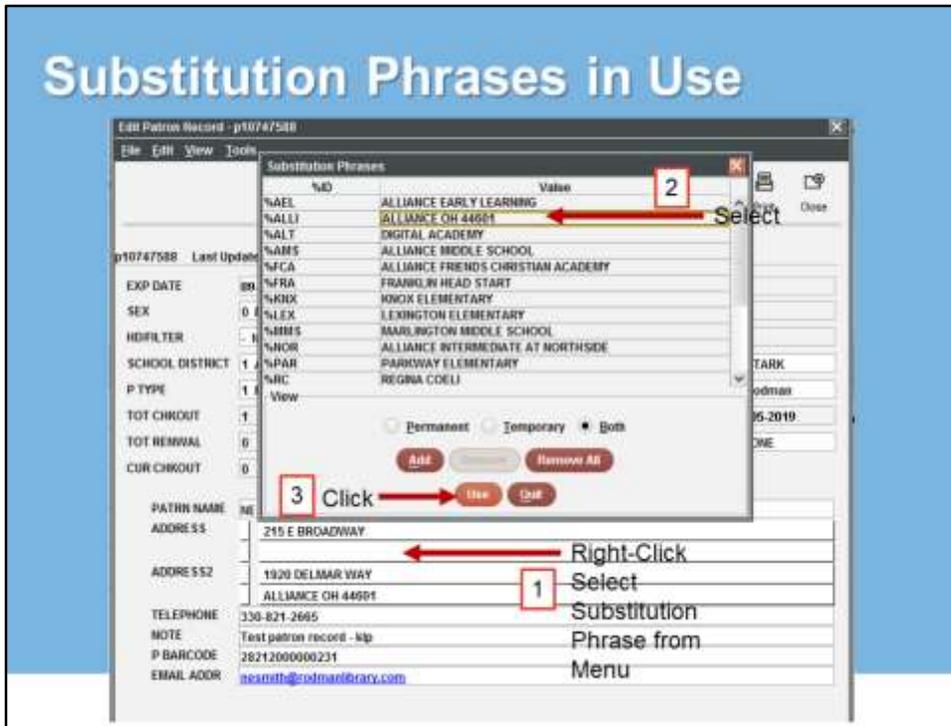
a ADDRESS 123 Main Street
%ALLI

Next Cancel New Record Creation

ADDRESS 123 Main Street
ALLIANCE OH 44601
ADDRESS
P BARCODE

Example of how it works with insert a field

Substitution Phrases in Use



When inserting a field

Miscellaneous

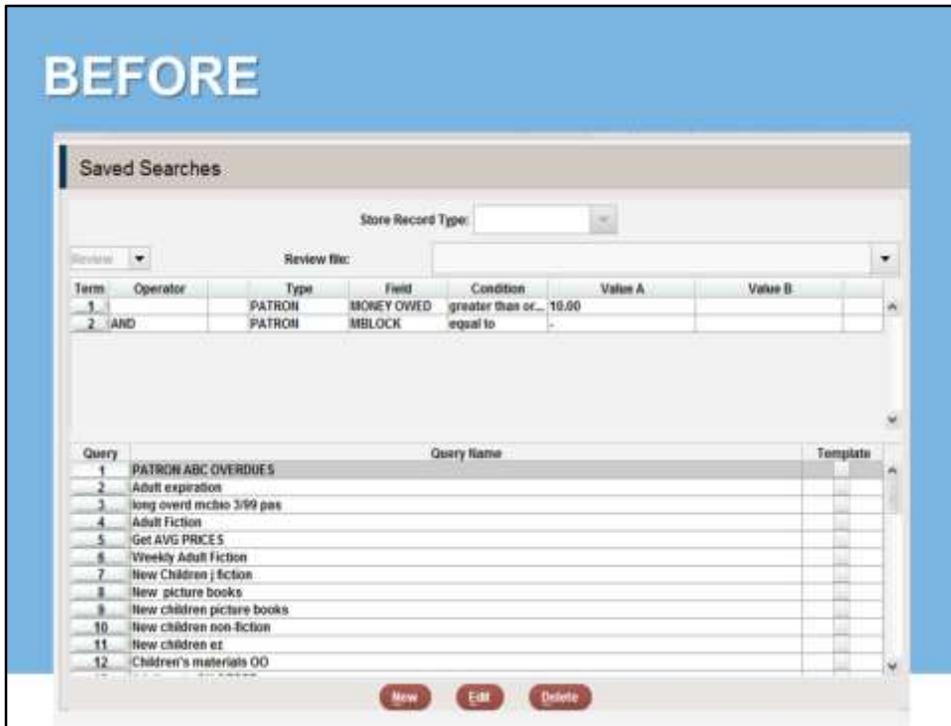


Review Files

- Use initials in names
 - Saved searches
 - Saved exports
 - Saved lists
 - Saved sorts

Use uniform naming conventions especially for saved stuff

BEFORE



Example: Before – no idea who created the saved searches

AFTER

The screenshot shows a 'Saved Searches' window. At the top, there is a 'Store Record Type:' dropdown menu. Below it is a 'Review' dropdown and a 'Review file:' text box. A table with columns 'Term', 'Operator', 'Type', 'Field', 'Condition', and 'Value A' is visible. Below the table is a list of queries with columns 'Query' and 'Query Name'. A red circle highlights the 'Query' column header and the first few rows of the list.

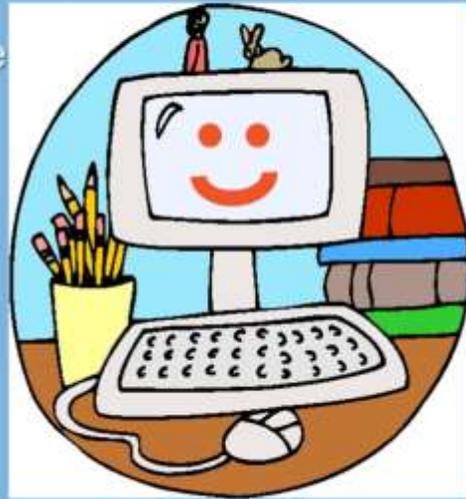
Term	Operator	Type	Field	Condition	Value A
1		PATRON	MONEY OWED	greater than or...	10.00
2	AND	PATRON	MBLOCK	equal to	.

Query	Query Name
20	Home Delivery patrons
21	jas-dvd's on order
22	jh - old "new" stuff
23	jh-old VHS search
24	kp - old loan rules
25	kp Active Patrons
26	kp Backstage
27	kp Bib recs with nothing attached
28	kp child patrons
29	kp CollectionHQ
30	kp email problem addresses
31	kp levy

After: can sort by query name and they will group together

Finally...

- Routine maintenance
- Vigilance
- Don't back down
- Training of staff



CSDirect

- Catalog Maintenance Tasks: Housekeeping in the Database

csdirect.iii.com/documentation/housekeeping.shtml

- Yearly Events Involving Statistics

csdirect.iii.com/documentation/yearlyevents.php

Questions or Other Suggestions?

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