

# Database Cleanup Documentation

\*\*\*Please note that where XXXX is listed in this document the delivery code of your library should be entered.\*\*\*

**Missing Items** - Once a year a report is run for items that are marked “missing” in order to clean-up the database and make corrections.

1. A report is run in Director’s Station for items that are marked missing. Use the All Catalog Measures in Director’s station, filtering for items owned by your library when Home Location is Missing. More information on using Director’s Station can be found at:

[http://tln.lib.mi.us/dept/shared-automation/files/DS\\_EndUser\\_guide\\_4.9.1\\_1.pdf](http://tln.lib.mi.us/dept/shared-automation/files/DS_EndUser_guide_4.9.1_1.pdf) (password needed to access documentation).

2. A thorough search of the collection is done. Items that are found are underlined or highlighted on the paper list; items that are not found are marked with a checkmark.

3. When searching is complete, items that have been found have the Missing status removed either by checking the item in or changing the Home Location in the “Call Number and Item Maintenance” wizard if it hasn’t been checked out to the Missing User Wizard.

5. When an item is found that requires a correction (IE: incorrect or incomplete call numbers) in the database, the item in question will be pulled from the shelf to make the correction. If necessary, new spine labels will be printed and applied and the item will be re-shelved.

6. Completed pages are given to the appropriate staff member who will review the list and make a decision about whether or not to replace the missing item. Items not replaced will be checked out to XXXX-DISCARD user. Replacement copies will be processed accordingly when they come in.

**In Transit Items** - A Pending Transits report is run twice a year, in April and October. This report includes items owned by XXXX library as well as items non-XXXX library items owned sent to fulfill holds for XXXX library patrons.

1. Open the Pending Transits wizard in WorkFlows to display the list of items that are currently in transit to the library. Items in transit that have a reason of “For Shelving” are on their way to the owning library for return; items in transit that have a reason of “For a Hold” are on their way to the library to fill a patron hold.

2. Items that have a reason of “For Shelving” for over two months ago are considered ‘In Transit Too Long’. Library staff should contact the library that sent the item and request a shelf check. Items not found will be reviewed for repurchase and checked out to the XXXX-DISCARD user.

3. Items that have a reason of “For a Hold” for over two months will be investigated. Library staff should contact the lending library to request a shelf check. If the item is not found, the item may need to be re-requested to fulfill the hold. Items sent for Hold are the responsibility of the lending library; item records are not modified or discarded.

## **Assumed Lost**

### *Items over 5 years*

Run a Director’s Station report using All Catalog Measures for XXXX library items where Location is Lost and Date Checked Out is greater than 5 years. If there are any results, open a TLN Help Desk ticket to request a Process Long Overdue Item report for XXXX library items marked “Assumed Lost” 5 years ago

and earlier, with the following parameters defined: items are to be discharged from the patron record, Lost Item notes are to be added to the Extended Info tab in patron record, no bills are to be added back to patron record, patrons are not to be barred, and item location is to be changed to Discard.

#### *Items between 2 and 4 years*

Run a Director's Station report using All Catalog Measures for XXXX library items where Location is Lost and Date Checked Out is between 2 and 4 years ago. If there are any results, open a TLN Help Desk ticket to request a Process Long Overdue Item report for XXXX library items marked "Assumed Lost" between 2 and 4 years ago. Parameters will be defined as the following: items are to be unlinked from patron records, new bills are to be added to the patrons' records, Lost Item notes are to be added to the Extended Info tab in patron record, patrons are not to be barred, and a processing fee is not to be added.

#### *Items less than 2 years*

1. A report is run in Director's Station using the All Catalog Measures report for items with Current Location of Lost, Lost-Paid, Lost-Assum, and Lost-Claim within the last two years.

2. A thorough search of the collection is done. Items found are underlined or highlighted on the paper list; items looked for and not found are marked with a checkmark. Found items are discharged fine-free and re-shelved. Items that are not found will remain on the patron record as a lost item.

### **Fines**

Open a TLN Help Desk ticket to purge all fines on XXXX library items from 5 years ago and older. Parameters will be defined as the following: overdue fines, processing fees, printing, fax, misc, damaged, admin fees, lost card fees, postage, recallov, and see-notes. There will be no max amount for the fines. Fines for lost items will not be purged in this stage.

### **Claims Returned**

Open a TLN Help Desk ticket to generate a Claims Returned report for XXXX library items. The list will be sent via email. A thorough search of the collection is done for items claimed returned. Items that are found are underlined or highlighted on the paper list; items that are not found are marked with a checkmark. Found items are discharged utilizing the Fine Free Discharge wizard and re-shelved. Staff review the list of items not found and decide whether to discard or replace those items.

### **Magazines/Newspapers**

1. A report is run in Director's Station using the All Catalog Measures report for XXXX library items with Item-Type of Magazine as well as Home location of Magazine.

2. Items older than 1 year are checked out to the XXXX-DISCARD user.

### **Shadowed Items**

1. A report is run in Director's Station using the All Catalog Measures report for XXXX library items.

2. Highlighting data cells will display a menu: select Show Shadowed Items from the menu.

3. Staff will review the list to determine if an item needs to be modified or discarded.