

Quality Control

Keeping your data accurate

Sue Glenn – Salt Lake County Library

 #IUG2019



Sunday, May 5th | Pre-Conference

Monday, May 6th – Wednesday, May 8th | Main Conference

Service is as good as our data

***Data Integrity** is the maintenance of, and the assurance of the accuracy and consistency of data. – Wikipedia*

- Accuracy – error free
- Complete – all data present
- Consistent – elements in expected sequence

Business rules

- Rules that govern data
 - Standards
 - Policies
 - Procedures
 - Documentation

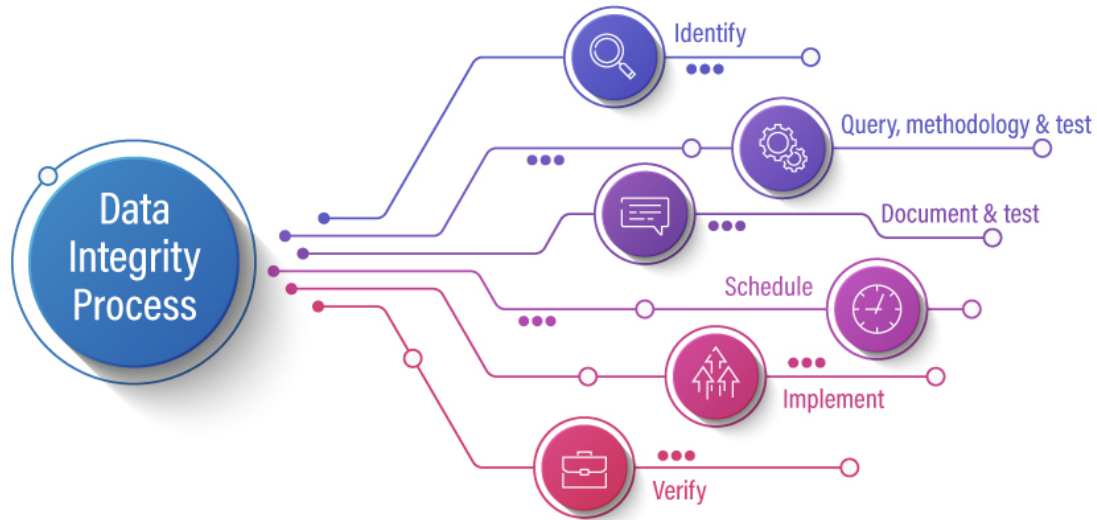
Polaris tools for data integrity

- Polaris searches (Search, Power Search)
- Polaris saved searches (SQL)
- Polaris record sets
- Polaris bulk change

Tools for documentation

- Searchable documentation in a shared space
 - File sharing (cloud or network)
 - Blogs
 - Help documentation software
 - Wikis

Data Integrity Process



Identify

- Identify a data problem
 - Can it be fixed with staff training?
 - Does it occur with some pattern?
 - Can you easily isolate the problem records?

Query, Methodology & Test

- Create a query
 - Normal
 - Power
 - SQL

Decide on methodology

- Individual changes
- Bulk change
- Automated

Test the process

Document & Test

- For repeatable quality → document steps
 - Describe problem
 - Steps to fix problem
 - Document the query
 - Test documentation

Schedule

- Create a schedule
 - Manual data cleanup schedule
 - Automated data cleanup
 - SQL stored procedure
 - PowerShell scripts
 - Data from external resources (i.e. National Change of Address)

Implement

- Run steps to fix data
 - Test running steps using your documentation
 - Fix small set of data

Verify

- Trust but verify
 - Spot check data changes
 - Any unintended consequences to your change?
 - Is there an error pattern?
 - Re-evaluate staff training?
 - Did this completely solve the problem?

How it all works together

▼ Routine Tasks

▸ As Needed

▼ Daily

- Check for deposits created by SMM
- Check for Patrons with Overdue eMaterial
- Check in Bad Transit Holds
- Delete Item Records Deleted Over 30 Days
- **Delete Lost Items Over 6 Months**
- Holds at closed locations
- Patron Name Cleanup
- Pages to Review

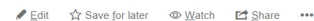
▸ Weekly

▸ Monthly

▸ Semi-Annually

▸ Annual

▸ SQL Tasks - Automated Daily tasks



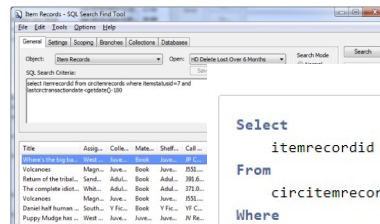
Delete Lost Items Over 6 Months

Created by Rachel Richardson, last modified by Sue Glenn on Aug 30, 2018

This SQL searches for items in Polaris that have been in the item status of 'Lost' for over six months.

🔔 **Responsible Personnel**
Help Desk Staff

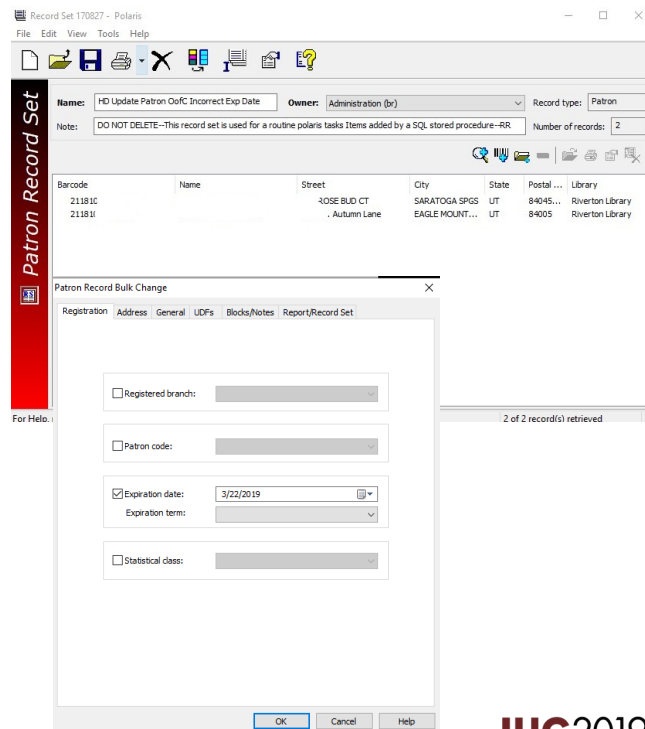
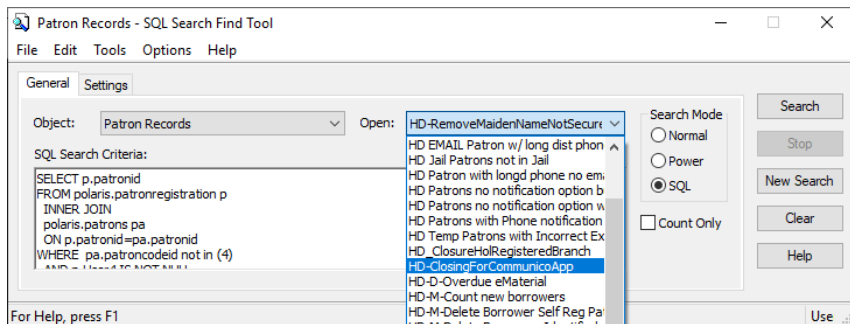
1. Open Polaris. Select Cataloging | Item Records (Ctrl + Alt + F9)
2. Select 'SQL' for the Search Mode
3. From the drop down list for 'Open' select '**HD-D-Delete Lost Over 6 Months**'
4. If no item records are returned you are done with this task. However, if any item record(s) is displayed please continue with the next step.
5. Select all item records returned from the SQL statement. To display all records you may need to hit keys 'CTRL+SHIFT+A'. Right click and select 'Delete'



```
Select
itemrecordid
From
circitemrecords (nolock)
Where
itemstatusid=7 and
lastcirctransactiondate<getdate()-180
```

How it all works together

- Polaris saved search
- Polaris record set
- Polaris bulk change



Data Cleanup Examples

- Individual changes
 - Delete holds with no items
 - Check for deposits created by our POS
 - Check bad transit holds
 - Long non-blocking notes
 - Items 45+ days overdue

Data Cleanup Examples

- Bulk changes
 - Holds at closed locations
 - Delete withdrawn items over 30 days
 - Delete item records deleted over 30 days
 - Delete lost items over 6 months
 - Change Patron statistical codes

Data Cleanup Examples

- Automated – SQL stored procedures
 - To record set for review, or changed via SQL
 - Patron name cleanup – looks for non-standard characters
 - Check expiration date for Out of County accounts

Automating data integrity

- Tools for automating
 - External source file – Excel or .csv
 - PowerShell
 - SQL stored procedure
 - Polaris Client – bulk change

Automating data integrity

- Example NCOA from Unique
 - National Change of Address (NCOA) – Unique Management Services source file – Excel
 - PowerShell – regular expressions to organize data for next step
 - SQL stored procedure – to change Polaris address data from file
 - Polaris Client bulk change – to finalize changes to Polaris data by changing patron code type, add a note to patron account



Questions?

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