



# Cleanup/Maintenance Tasks YOU Can Do

*No SQL Necessary!*

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# You Have Data; You Probably Have Errors

- Come up with a list of tasks that you want to tackle (ex. make sure all patrons have a valid barcode in record)
- Decide how often your system needs to address the task
- Assign the task to staff member(s) that make sense
- Set up as recurring in calendar
- Be accountable

# Message in a Barcode

## ITEM variable field with unexpected characters

Scenario: Staff intends to insert a message or a note in a record, but accidentally inserts the wrong field, like the barcode field. Barcode fields should only include numbers.

Example query:

Find items with barcodes that include letters: ITEM  
BARCODE MATCHES [a-z]

Other searches that uncover bad barcodes (ex. item  
barcodes vs. patron, etc.):

ITEM or PATRON BARCODE equal to ""

ITEM or PATRON BARCODE All fields don't have <start  
of your barcode schema>

ICODE2	j JUVENILE BOOKS
I TYPE	30 Paperback Books
PRICE	\$6.99
OUT DATE	- - :
OUT LOC	200
DUE DATE	- -
PATRON#	0
LPATRON	0
LCHKIN	11-04-2020
b	1000553895
b	Bottom right corner of the front cover is torn - 2/23/22 JD
x	jlc, B&B

# High Replacement Cost

## ITEM variable field with unexpected data

Scenario: Patron gets a \$250 bill for a book that cost \$25.

Example query:

ITEM PRICE greater than "\$200.00" AND ITEM I TYPE not equal to "1" AND ITEM I TYPE not equal to "22" (etc.)

Because there are items that legitimately cost quite a bit more than others (reference materials, hardware, etc.), you will want to search or exclude by item types, i.e., paperbacks more than \$50, etc.

COPY #	0
ICODE1	0
ICODE2	j JUVENILE BOOKS
I TYPE	14 NEW Hardback
PRICE	\$250.00
OUT DATE	- - :
OUT LOC	400



# New But Not New

ITEM type has a “new” designation but it’s not in a “new” shelf location

Scenario: PS staff is tasked with removing items from new shelves after a particular date, changing the item type from new to regular and updating the item shelf location. Things get missed or a new item doesn’t make it back, is missing, etc.

Example query for a branch:

ITEM STATUS not equal to "p" AND ITEM LOCATION starts with "w" AND (ITEM I TYPE equal to "10" OR ITEM I TYPE equal to "26" OR ITEM I TYPE equal to "14") AND (ITEM LOCATION not equal to "wnew" AND ITEM LOCATION not equal to "wncdb" AND ITEM LOCATION not equal to "wnewj" AND ITEM LOCATION not equal to "wnlgp" AND ITEM LOCATION not equal to "wnva" AND ITEM LOCATION not equal to "wnya")

rsc, staff, warrc

Record

Not checked out

I13397758 Last Updated: 03-09-2022 Created: 07-09-2010 Revisions: 166

COPY #	0	INVDA	MM-DD-YYYY	LOCATION	wjuv Warrenton Picture Books
ICODE1	0	IN LOC	100	LOANRULE	0
ICODE2	j JUVENILE BOOKS	# RENEWALS	0	STATUS	- AVAILABLE
I TYPE	14 NEW Hardback	# OVERDUE	0	INTL USE	4
PRICE	\$14.99	ODUE DATE	MM-DD-YYYY	COPY USE	0
OUT DATE	MM-DD-YYYY hh:mm	IUSE3	0	IMESSAGE	
OUT LOC	100	RECAL DATE	MM-DD-YYYY	OPACMSG	- ---
DUE DATE	MM-DD-YYYY	TOT CHKOUT	37	YTDCIRC	4
PATRON#	0	TOT RENEW	10	LYCIRC	4
LPATRON	1037918	LOUTDATE	02 - 28 - 2022 11 :25 AM	Sticky Status	- AVAILABLE
LCHKIN	03 - 09 - 2022				

b 1000430269

m replacement cost \$14.99 JSA 2/25/22

# Patron Renewals

## Library cards expire???

Scenario: A library wants to pre-emptively capture and extend expiration dates of active customers. Patron cards will be renewed and staff will be alerted to confirm details at a later date and remove the alert.

Run a list of patrons with EXP DATE with your time frame and any other limiters; make sure they don't already have a message about being renewed.

Extend the expiration date and insert a message (ex. "Expiry Rolled: Please confirm all customer information and delete this message (date)")

Result: Patron doesn't get blocked from services in the meantime - esp. helpful if it's 3 AM and they need to check out that e-book or log into JSTOR!

The image shows two screenshots of the Sierra library management system interface.

The top screenshot is the "Boolean Search" window. It shows a search for "Review File Name: IT Tasks - Rolling Expiry 05-01-2015" with "Store Record Type: PATRON p". The search criteria are defined in a table:

Term	Operator	Type	Field	Condition	Value A	Value B
1		PATRON	EXP DATE	between	01-03-2015	01-07-2015
2	AND	PATRON	MESSAGE	At Least on...	expiry rolled:	
3	AND	PATRON	P TYPE	not equal to	9	
4	AND	PATRON	P TYPE	not equal to	7	
5	AND	PATRON	P TYPE	not equal to	21	
6	AND	PATRON	P TYPE	not equal to	22	
7	AND	PATRON	P TYPE	not equal to	50	

Below the table, the search criteria are summarized: "PATRON EXP DATE between '01-03-2015' and '01-07-2015' AND PATRON MESSAGE At Least one Field doesn't have 'expiry rolled: ' AND PATRON P TYPE not equal to '9' AND PATRON P TYPE not equal to '7' AND PATRON P TYPE not equal to '21' AND PATRON P TYPE not equal to '22' AND PATRON P TYPE not equal to '50'".

The bottom screenshot is the "Sierra" main interface. It shows the "FUNCTION" dropdown set to "Global Update". The "3. Preview" section displays a list of records with their details:

#	Record	Old	New	Data
1	p17258315	Old	New	EXP DATE - "12-06-2015"
2	p18997077	Old	New	EXP DATE - "01-07-2017"
3	p16415589	Old	New	EXP DATE - "28-05-2015"
4	p17434154	Old	New	EXP DATE - "22-05-2015"
5	p15737032	Old	New	EXP DATE - "03-06-2015"
6	p18470373	Old	New	EXP DATE - "23-06-2015"

The interface also shows a "Process" button and a "Statistics" section.

# Fun With Field Statistics

See bad bib or item data at a glance

Scenario: Bibs are missing the MAT TYPE or you're seeing things that should no longer exist in the collection.

First go to Statistics and run a Field Statistics query across all your bibs (or items if you're looking for anomalies in your item records).

You may want to export the results to Excel and work from there.

Then use Create Lists to run queries to find and correct the problems (ex. BIBLIOGRAPHIC MAT TYPE equal to "-")

Tip: Delete your results if you're done using them!

Range = b1000000-  
136191 records were processed. (217140 records ha

Code	Meaning	Record C...	COPIES
-	-	13	0
2	Library I	2	17
3	E-BOOK	15083	0
8	MOBILE	2	20
a	BOOK (I	93951	160974
b	ARCHIV	1	0
c	PRINTED	104	159
d	DVD	5189	10277
e	MAP	73	124
f	MICROFI	44	336

Saved Query Name: Unnamed  
Results File Name: Unnamed

Range: Start b10000008 Stop b\*

Report On: Bibliographic Query Type: ☒ Field Statistics ☐ Periodic Report ☐ Cross Tab

☒ Limit the results by a time range ☐ Fastest accumulation Split multi

Base the orders report on: ☒ Paid dates ☐ Invoice dates

Time Resol...  
☒ Yearly  
☐ Quarterly  
☐ Monthly  
☐ Day Range

Date Range  
☒ Last Year vs. the Year Before  
☐ Select One Year 2021 2020 2021  
☐ Select Two Years

Year  
☒ Use Fiscal Year  
☐ Use Calendar Year

Save the Query Save as Schedule the Query Run the Query!

# Missing pieces

## Check key fields for missing data

Scenario: In manual entry processes, things can left blank, or entire records can get saved with no data.

Run a create list for whatever field you want to check, eg:

BIBLIOGRAPHIC TITLE equal to ""

BIBLIOGRAPHIC LOCATION equal to "none "

BIBLIOGRAPHIC Material Type equal to "-"

ITEM LOCATION equal to "none "

ITEM BARCODE equal to ""

Delete!

Below is an actual empty bib from our system!





Search:

Advanced Search

PRINT BOOK |

Request it

Additional actions:



Bookmark This Record

Permalink: [https://sallypro.sandiego.edu/iii/encore/record/C\\_\\_Rb4023079](https://sallypro.sandiego.edu/iii/encore/record/C__Rb4023079)

# Code Mismatches (Bibs vs. Items)

## BIB Material Type doesn't align with ITEM code(s)

Scenario: Vendor order records created, bibs show incorrect format (projected medium vs. dvd) or item records have wrong codes associated with type of material it is – aside from causing confusion as to what the public may see if your catalog uses material type icons, it impacts your statistics!

Example queries:

ITEM ITYPE equal to [dvd] AND BIBLIOGRAPHIC MAT TYPE not equal to [dvd]

ITEM ICODE2 equal to [dvd] and BIBLIOGRAPHIC MAT TYPE not equal to [dvd]

Record	
Not checked out	
i13915708	Last Updated: 07-01-2021 Cre
COPY #	0
ICODE1	0
ICODE2	a ADULT BOOKS
I TYPE	27 CD Books
PRICE	\$27.00
OUT DATE	

# Attachment issues

## Bibs with no items, orders or check-ins attached

Scenario: Bibs without attached items may be the result of staff using incorrect load profile.

Use the “LINKED REC” option in create lists to find bibs without attached records.

Our system does item-level holds, and since this bib has no items, my hold request will go into a black hole.

In some cases, uncovering bibs without items will mean you have to re-load (unless you have a clever load profile which can overlay bibs but add items)

<div>Group Ungroup Insert Line Duplicate Line Append Line Delete</div>				
Operator	Type	Field	Condition	Value A
	BIBLIOGRAPHIC	BCODE3	not equal to	s
AND	BIBLIOGRAPHIC	LINKED REC	not exist to	ORDER
AND	BIBLIOGRAPHIC	LINKED REC	not exist to	ITEM
AND	BIBLIOGRAPHIC	LINKED REC	not exist to	CHECKIN

**Questions & answers. Business associations : multiple choice and short answer questions and answers / by Douglas M. Branson, W. Edward Sell Chair in Business Law, University of Pittsburgh School of Law**

Branson, Douglas M., author

PRINT BOOK | LexisNexis | [2004]

 Request it

Additional actions:



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# Too Many Delimiters (245)

BIBs have incorrect delimiters in 245

Scenario: Vendor records!!!

Example query:

BIBLIOGRAPHIC MARC Tag 245 matches "|a.\*|a"  
OR BIBLIOGRAPHIC MARC Tag 245 matches  
"|b.\*|b" OR BIBLIOGRAPHIC MARC Tag 245  
matches "|c.\*|c"

This is pretty common with the records from  
OverDrive...

LANG	eng English	CAT DATE	05-
SKIP	0	BIB LVL	m
LOCATION	eboo E-Books (Bib Location)	MAT TYPE	3
MARC Leader	##### c a m 2 2 ##### 7 i 4 5 0 0		
o	001		erc0000898555
y	003		TLC
y	005		20210304221051.0
y	006		m d
y	007		c r u n u
y	008		210304 s 2021 xxu       o        eng d
i	020		9781787028531 (electronic book)
y	037		B1F2238E-8EC7-4622-9B86-0E6EB90CEE6 bOverDrive, Inc. n <a href="http://www.overdrive.com">http://www.overdrive.com</a>
y	040		TLC cTLC dTLC erda
c	092	0	ELECTRONIC BOOK
t	245	1 0	Vietnam h[electronic resource] : b : bthe essential guide to customs & culture.

Title: Vietnam [electronic resource] : the essential guide to customs & culture.  
Publisher: Chicago : Kuperard, 2021.

Online Content:

[Click here to access via Overdrive/Libby](#)

[Click here to access excerpt](#)



# Cataloging – Incorrect non-filing indicators

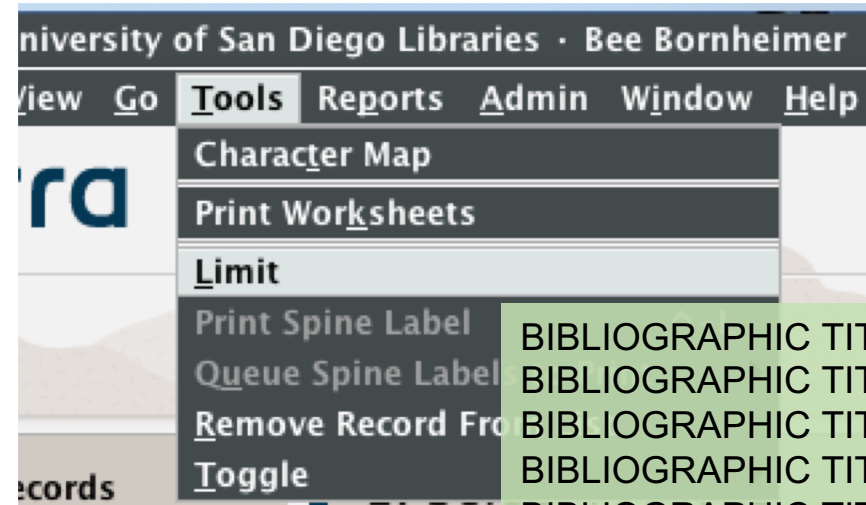
Check that the 245.# matches the data in the field

Scenario: Does the number in the indicator correspond to the actual beginning article in the title?

Run a list on recently cataloged materials. Work with the file in Global Update.

Use Limit function to first limit to records where the indicator is over 5, and review the results to make sure they are correct.

Cycle through 4, 3, 2, 1,0



BIBLIOGRAPHIC TITLE matches ^245.[5-9]  
BIBLIOGRAPHIC TITLE matches ^245.4  
BIBLIOGRAPHIC TITLE matches ^245.3  
BIBLIOGRAPHIC TITLE matches ^245.2  
BIBLIOGRAPHIC TITLE matches ^245.1  
BIBLIOGRAPHIC TITLE matches ^245.0

	#		TITLE
<input checked="" type="checkbox"/>	1	b	24502 aA century of manned, powered flight : baviation 100.
<input checked="" type="checkbox"/>	2	b	24512 aA closer look : bcolour / cDavid Bomford and Ashok Roy.
<input checked="" type="checkbox"/>	3	b	24512 aA guide to Oriental classics / cPrepared by the staff of the Oriental studies
<input checked="" type="checkbox"/>	4	b	24512 aA handbook to classical Japanese / cJohn Timothy Wixted.
<input checked="" type="checkbox"/>	5	b	24512 aA musical dreame, or, Fourth booke of ayres, 1609 / cRobert Jones.
<input checked="" type="checkbox"/>	6	b	24512 aA number of people : ba book of reminiscences / cby Edward Marsh.
<input checked="" type="checkbox"/>	7	b	24512 aA paleographic guide to Spanish abbreviations, 1500-1700 = buna guía pale
<input checked="" type="checkbox"/>	8	b	24502 aA taste for sculpture. nVI : pMarble, bronze, terracotta, ivory and wood (15
<input checked="" type="checkbox"/>	9	b	24502 aL'Italia del Rinascimento : blo splendore della maiolica / ca cura di Timothy
<input checked="" type="checkbox"/>	10	b	24010 aMusical dreame



# Cataloging – Invalid subfields

Don't allow naughty invalid subfields into your records

Scenario: Occasionally a bib title will have a \$ or an actual pipe character as part of the title, which will get misinterpreted as a subfield.

Use regular expressions in Create Lists to find existence of any subfields outside of the valid ones.

(Thanks to Richard Jackson for coming up with so many wonderful Sierra-based regular expressions)

up	Ungroup	Insert Line	Duplicate Line	Append Line	Delete
Type	Field	Condition	Value A		
BIBLIOGRAPHIC	MARC Tag 245	matches	[^abcfghknps68]		

roup	Ungroup	Insert Line	Duplicate Line	Append Line	Delete
Type	Field	Condition	Value A		
BIBLIOGRAPHIC	MARC Tag 650	matches	[^abcdeg4vxyz2012368]		

245	1	0	Postal reform : bsustaining the nine million jobs in the  9 00 billion mailing industry : hearings before the Committee on C
-----	---	---	---

t	245	0	0	4x45: Designing Katie Mitchell's Theatre   Alex Eales /  cDigital Theatre-
---	-----	---	---	--

# Clean Up After You Clean Up

- **Create Lists:** Empty review files that are old/not in use (plan on nagging staff)
- **Create Lists:** Save your searches, esp. complicated ones. Be sure to check the box to include record information. It can increase the number of saved searches if you find that you're maxing out.
- **Data Exchange** - Many staff send files to print to data exchange. They put on their PC but forget to delete the file in Data Exchange.
- **Statistics:** Saved Queries – do you need all of them? Delete those unnecessary. Same with Saved Results. These old files slow things down.

# *Thank You All:*

*Bee Bornheimer, Michelle Henley, Richard Jackson,  
Susan Johns-Smith, Traci Monchamp, Alison Pruntel,  
Mary Searle, Joanne Seward, Kate Wolfe, Elizabeth Wright, Jeremy Goldstein*

Be sure to download the handout - many more tricks and tips for record cleanup!



# THANK YOU

Questions?

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