



From Simply Reports to Bulk Changes:

Reports and Correcting Errors in the Catalog

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Objectives



Review the basic functions of Simply Reports, record sets, and bulk changes.



Learn how to apply that knowledge to create more complex reports for technical services and execute bulk changes of records.

Agenda

PART 1:

- Introduction
- Review of Simply Reports Functions
- Examples of Reports:
 - Reports for gathering statistics
 - Reports to Identify and Correct Errors
 - Serials reports

PART 2:

- Introduction
- Search for Record Sets
- Ways to create record sets
- Item record bulk changes
- Bibliographic record bulk changes

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How can cataloging staff benefit from Simply Reports?

- Simply Reports is a web-based report module that allows users to create custom reports based on the data in the Polaris database.
- **EXAMPLES:**
 - Statistics on the creation of bibliographic and item records.
 - Collection statistics.
 - Identify mistakes in bibliographic and item records that need correcting, such as the wrong material type, the wrong bibliographic primary type of material, missing prices, or missing statistical codes.
 - Create record sets.
 - Weeding reports for serials or other items.

Types of Reports for Bibs, Items, & Serials



The diagram consists of two blue, trapezoidal shapes pointing to the right, positioned side-by-side. The left shape contains the text 'List Reports' and the right shape contains the text 'Count Reports'.

List Reports

Count Reports

List Reports

- Lists each record individually
- One record per row
- Purpose: Identify specific records, create a list to pull items from shelves, and create a record set.

ItemBarcode	CallNumber	BrowseTitle	CollectionName	ItemLifetimeCircCount	LastCircTransactionDate
31488003958899	394.12 SCH	Fast food nation : the dark side of the all-American meal	Nonfiction	20	7/3/2018 2:47:49 PM
31488005859640	395.22 STE	The bridesmaid's manual : make it to and through the wedding with your sanity (and your friendship) intact	Nonfiction	9	5/27/2015 12:00:00 AM
31488003111945	398.2 MYT	Myths and legends of the world	Nonfiction	0	1/16/2015 12:00:00 AM
31488003575743	613.713 JOH	The complete idiot's guide to weight training illustrated	Nonfiction	13	3/29/2007 12:00:00 AM
31488003145943	635.9349 GRO	Gardening with ornamental grasses	Nonfiction	21	5/3/2015 12:00:00 AM
31488002033678	635.977 HAG	Trees, shrubs, and roses for midwest gardens	Nonfiction	40	5/15/2015 12:00:00 AM
31488004964698	652.8 BOO	The book of codes : understanding the world of hidden messages : an illustrated guide to signs, symbols, ciphers, and secret languages	Nonfiction	12	6/23/2015 12:00:00 AM
31488003276359	745.1 MIL	Arts & crafts	Nonfiction	8	1/20/2015 12:00:00 AM
31488005024666	745.1 PRI	Good, better, best : trade secrets for spotting a "find"	Nonfiction	22	4/27/2015 12:00:00 AM
31488005656541	005.52 ACCESS 2010	Access 2010 all-in-one for dummies	Nonfiction	7	4/28/2014 12:00:00 AM
31488005672308	021.2 LIB	Librarians as community partners : an outreach handbook	Nonfiction	0	8/7/2012 12:00:00 AM
31488005908405	232.96 ORE	Killing Jesus : a history	Nonfiction	17	7/14/2015 12:00:00 AM

Count Reports

- Can display the total sum of counts and monetary values for a category or combination of categories.
- Purpose: Tabulate statistics and identify errors when comparing data across different categories.

CollectionName	TotalItemPrice	NumberOfItems
Online	0.00	58520
Youth Fiction	598647.83	38716
Fiction	649531.52	28797
Nonfiction	565100.67	21733
Multimedia	574097.16	21571
Youth Nonfiction	240704.59	12080
Youth Multimedia	170597.16	7795
Teen Fiction	109823.02	6979
Youth Online	0.00	5485
Teen Online	0.00	1570
Magazines	5893.90	1278
Teen Nonfiction	9134.95	529
Other	10570.64	515
Teen Multimedia	9001.08	224
Youth Magazines	442.97	100
	39.14	98
Youth Other	616.00	3

Cataloging Statistics

What reports can I run to gather statistics?

- How many new items were added for each collection and material type combination during a given time-period?
- How many records did I (or my staff) create or modify during a given time-period?

EXAMPLE 1 – Item Count Report

How many new items were added last month for each collection and material type combination?

Report Configuration

What Information should be displayed?

Output Columns

What records are you looking for?

Report Filters

Report Configuration

What Information should be displayed?
OUTPUT

Item assigned branch name
Item assigned collection name
Item material type

What records are you looking for?
FILTERS

Report Filters

EXAMPLE 1 – Item Count Report

How many new items were added last month for each collection and material type combination?

Report Configuration

What Information should be displayed?

Item assigned branch name
Item assigned collection name
Item material type

What records are you looking for?

Assigned Branch
Record Status - Final
First available date

Filtering for Items

Elements to filter by:

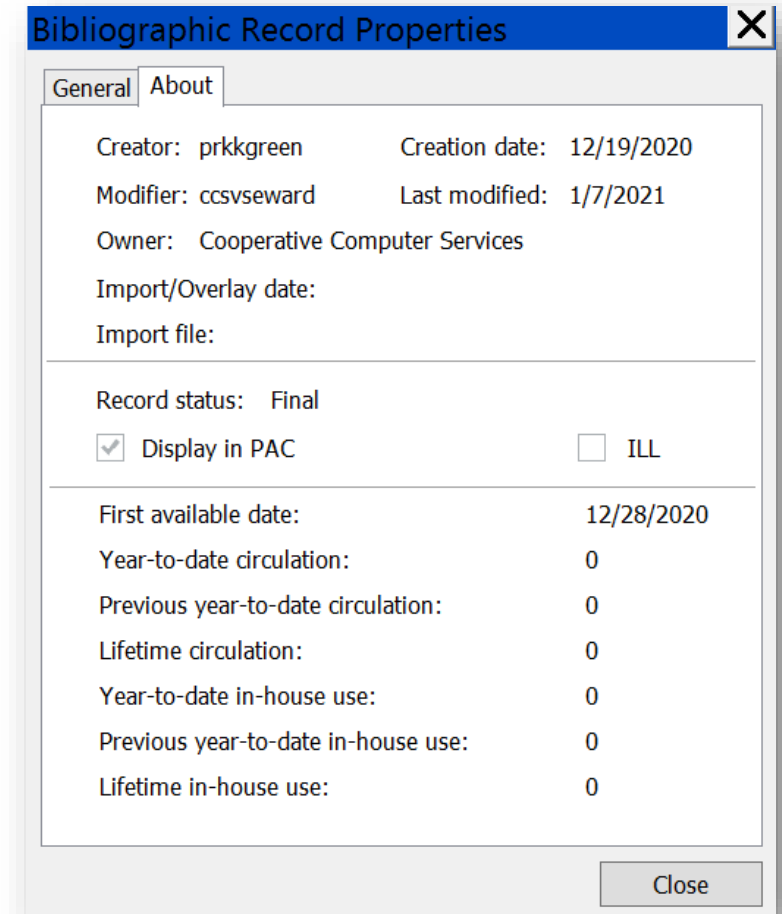
- Collection
- Statistical class code
- Shelf location
- Material type
- Call number range

Example 2 – Bib Count Report

How many bibliographic records did I
create (or modify) last week?

Should you choose the creator name or the modifier name?

- Who is the creator?
 - The staff that loaded the on-order record or final record without overlaying an existing on-order record.
 - The staff that created the record in Polaris from scratch.
- Who is the modifier?
 - The staff that overlaid the final record over the on-order record or existing final record.
 - The staff that edited (or deduplicated) an existing record.
- Note: Only the most recent modifier can be queried. If someone modifies a record after you, your name will be replaced by theirs.



The screenshot shows a window titled "Bibliographic Record Properties" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "About". The "General" tab contains the following information:

Creator: prkkgreen	Creation date: 12/19/2020
Modifier: ccsvseward	Last modified: 1/7/2021
Owner: Cooperative Computer Services	
Import/Overlay date:	
Import file:	

Record status: Final

☒ Display in PAC ☐ ILL

First available date:	12/28/2020
Year-to-date circulation:	0
Previous year-to-date circulation:	0
Lifetime circulation:	0
Year-to-date in-house use:	0
Previous year-to-date in-house use:	0
Lifetime in-house use:	0

Close

Identifying Cataloging Errors

Which reports can be used to identify cataloging errors?

Report type: List Reports

- List reports can be used to identify missing data, or if boxes are checked or unchecked.
- Filters to use:
 - Checking “Not present”
 - Bib checkbox filters
 - Item checkbox filters

Which reports can be used to identify cataloging errors?

– Item call number filters

<input checked="" type="checkbox"/> Prefix	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/> Not present
<input type="checkbox"/> Classification number	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Not present

– Item checkbox filters

<input type="checkbox"/> Display in PAC checked	<input type="checkbox"/> Display in PAC unchecked
<input type="checkbox"/> Call number not present	<input type="checkbox"/> Call number present
<input type="checkbox"/> Holdable unchecked	<input type="checkbox"/> Holdable checked
<input type="checkbox"/> Electronic item checked	<input type="checkbox"/> Electronic item not checked
<input type="checkbox"/> Pickup at this branch not checked	<input type="checkbox"/> Pickup at this branch checked
<input type="checkbox"/> Patrons from this branch only not checked	<input type="checkbox"/> Patrons from this branch only checked
<input type="checkbox"/> Patrons from this library and branches not checked	<input type="checkbox"/> Patrons from this library and branches checked
<input type="checkbox"/> Days past first available not checked	<input type="checkbox"/> Days past first available checked

Example 3 – Item List Report

Which item records are missing a price?

Which reports can be used to identify cataloging errors?

Report type: Item Count Reports then Item List Reports

- Bibliographic Record TOM vs. Item Material Type
- Item loan period code vs. Item fine code
- Item assigned collection name vs. Item statistical code
- Item assigned collection name vs. Item shelf location
- Item statistical code vs. Item classification number
- Item statistical code vs. Item call number prefix
- Item assigned collection name vs. Item call number prefix
- Item shelf location vs. Item call number prefix
- Misspelled prefixes

Which reports can be used to identify cataloging errors?

Audio Book on Cassette	Book	8
Audio Book on Cassette	Cassette	72
Audio Book on Cassette	Cassette Audiobook	141
Audio Book on Cassette	CD	3
Audio Book on Cassette	CD Audiobook	5
Audio Book on Cassette	Multimedia Kit	33
Audio Book on CD	Book	3
Audio Book on CD	Book New	16
Audio Book on CD	Cassette Audiobook	6
Audio Book on CD	CD	181
Audio Book on CD	CD Audiobook	9621
Audio Book on CD	CD Audiobook New	726
Audio Book on CD	CD New	14
Audio Book on CD	CD-ROM	1

Examples 4 & 5 – Item Count and List Reports

- Are there any bibliographic or item records with the wrong item material type or bibliographic primary type of material?
- Which records need to be corrected?

What is the difference between these material types?

Bibliographic Primary Type of Material

Item Material Type

Title	Author	Format
Unhinged		Blu-ray + DVD
Tenki no ko = Weathering with you		Blu-ray + DVD
Penguins	Hastings, Derek,...	Book
The Chanel Sisters A Novel	Little, Judithe.	Ebook

Material Type*

Blu-ray

Statistical Code

Comedy

LDR	cgm a22	i 4500	
001	3435977		
005	20201219145615.0		
007	vd csaizq		
007	vd cvaizq		
008	201113s2020	cau090 e	vleng d

Serials Reports

Which reports are useful for serials?

- Serials reports query the serial holdings records.
- For the item records that aren't linked to serial holdings records yet, you can use item reports.
- Useful serials reports include:
 - Creating a union list of all magazines.
 - A count list of the number of magazines in each collection.
 - A weeding list of magazines to be withdrawn.
 - Identifying magazines with low circulation counts.

Example 6 – Serials list & Item list report

Which magazines can be withdrawn?

Example 7 – Item Count & Serials Count Report

Which magazines have the lowest circulation?

Record Sets and Bulk Changes

Ways to Create Record Sets

1. Using the “New” drop-down menu in Leap.
2. Converting an item record set to a bibliographic record set and vice versa.
3. Using the Find Tool in Leap.
4. From a bibliographic record or item record.
5. From Simply Reports.



THANK YOU

Questions?