

Discard/Delete Missing Items

(Note: ONLY ADMIN (ITC Providers) HAVE ACCESS TO THESE REPORTS)

To be done after the library staff has completed ALL Inventory steps through Step 5 including the Step 4 report that checks out the missing items to MISSING.

NOTE to ITC Staff: **Both Step 6 and Step 7 reports must be run to be sure all appropriate items are changed to DISCARD.** You will need to run Step 6 and Step 7 to get LOST/MISSING items marked DISCARD. And then run Step 8 to delete the DISCARD items.

Step 6 is used for items that are not "checked out", but have the status of LOST (variety of LOST statuses) or MISSING (see doc - Sec 14.6 for list of possibilities).

Step 7 is used for items that the library has marked MISSING in the Inventory process (Step 4b), or using the MARK ITEM MISSING wizard - these items are all "checked out" to the MISSING user. This report will change items with the status of MISSING to the status of DISCARD.

Step 8 is then run to remove all items with DISCARD status.

Step 6 Report – Set Copies to DISCARD

Use the **Step 6)** report to change the status to DISCARD for a group of items that:

- have the status of LOST and are NOT checked out.
- have been declared LOST-CLAIM via the MARK ITEM LOST wizard and are no longer connected to the patron (have been paid, or forgiven, or cancelled).
- the status of MISSING was selected manually, not via the inventory process.
- items with status of MISSING, no transaction attached.

1. Basic Tab – **rename** report with building in it.

2. Item Selection Tab – **change** library, **use** gadget to select statuses, **select** item group or make blank if all groups.

3. Update Option – **leave** unchecked.

4. **Save** as a template.

5. Have Librarian **OK** this list.

6. **Rerun** the report from the template, changing the Update Option by checking the box.

Step 7) Report – Convert DISCARD Copies

This report will change items **checked out to the MISSING user** to the status of DISCARD (or possibly items checked out to the **LOST** user):

1. Make a template of the **Step 7) Convert DISCARD Copies** report.

HINT: Change the report name to *XXX Convert DISCARD Cp* (XXX = LIBRARY)

User ID Tab

- User ID: **MISSING**
- User ID: **LOST** (if items checked out to LOST user in Sirsi migration)

Screenshot of the 'Schedule New Reports' interface for 'Schedule Step 8) Convert DISCARD Copies'. The 'User ID' field is set to 'MISSING'. An arrow points from the 'MISSING' text in the list above to this field.

Call Number Selection Tab

- Number of copies >0

Item Selection Tab

- Library: XXX
- Specific Item Group can be selected; if selection is ALL item groups, leave *blank*.
- Specific DATE can be selected; if selection is ALL MISSING items, leave blank. If specific date range needed, select "**Date last checked out**" –BEFORE <date needed> or specific date range.

Screenshot of the 'Date last checked out' field with the value '<08/01/2006'.

Update Options

- Update Database: **No Check**

Screenshot of the 'Update database records' checkbox, which is unchecked.

2. Run the *XXX Convert DISCARD Cp* report - Listed items will be changed to status of DISCARD.

3. Run the *XXX Convert DISCARD Cp* report again

Update Options

- Update Database: **Checked**

Screenshot of the 'Update database records' checkbox, which is checked.

HINT: before running this report a second time, change the report name to *XXX Convert DISCARD Cp Y* (will help you keep track in case of interruptions)

After the database is updated, the items should have:

- *Shelf location: (AVAILABLE – or could vary - as manually set on item record)*
- *Current status: DISCARD.*

Items now have status of DISCARD

- **Next steps will DELETE items from the database.**
- If library staff wants a list of items deleted, remind them to save the report on their computer.
- Inventory reports on FINISHED REPORTS tab will NOT disappear after 30 days.

Step 8) Report – Rem DISCARD by Location

This report will remove all items marked DISCARD from the database.

1. Make a template of the **Step 8)** Rem DISCARD by Location.

HINT: Change the report name to *XXX Rem DISCARD by Loc*

Item Selection Tab

- Library: XXX.
- Current status: DISCARD.
- Number of copy holds: =0.

Sorting Criteria Tab

- Call Number.

Update Options Tab

- Update Database –
No Check.

Remove Items by Location Tab

- Remove all items in the designated location: **Check.**
- Remove title when removing last copy: **Check.**
- Information for each discarded copy: **Check.**

Print Item Tab

- Record by record **Selected.**
- Entry List only **Selected.**
- Title Info/Catalog entry list: **245,949**
- Data only **Selected.**
- Call Number only **Selected.**
- Brief copy information **Selected.**
- **Run** the *XXX Rem DISCARD by Loc* report

Items **still** have:

- Shelf location: (AVAILABLE – or could vary – as manually set on item record)
- Current status: DISCARD

Screenshot of the 'Remove Items by Location' tab in the report configuration interface. The interface shows several tabs: Basic, User ID, Item Selection, Checkout Selection, Sorting, Update Option, Remove Items By Location, and Print Item. The 'Remove Items by Location' tab is active. It contains the following options:

- Options for Changing Location: Move charged items to this new current status: [dropdown menu] (Also specify the "User ID" under Selection Criteria.)
- Options for Removing Items:
 - Remove all items in the designated location
 - Remove title when removing last copy or volume
- Copy/Title information to report when removing items:
 - Information for each discarded copy
 - Information only for titles with last copy or volume removed
 - No copy or title information

Screenshot of the 'Print Item' tab in the report configuration interface. The interface shows several tabs: Basic, User ID, Item Selection, Checkout Selection, Sorting, Update Option, Remove Items By Location, and Print Item. The 'Print Item' tab is active. It contains the following options:

- Printed arrangement:
 - Catalog shelflist
 - Call number shelflist
 - Record by record
- Shadow filtering:
 - Public items
 - Shadowed items
 - Public and shadowed items
- Generate pipe delimited output
- Title Information:
 - Control record data
 - First Call number, Publication year, Entry list
 - Publication year, then entry list
 - Entry list only
 - None
- Entry list: [text box with value 245,949]
- Entry labeling options:
 - Descriptive labels
 - Entry IDs as labels
 - Data only
- Show indicators and subfields
- Call Number Information:
 - All call number information
 - Call number only
 - No call number information
 - Call number bound-with links
- Item Information:
 - All copy information
 - Brief copy information
 - Abbreviated copy and circulation information
 - No copy information
 - Circulation summary
 - Bills
 - Checkouts
 - Holds
 - Copy comments
 - Inventory information
- Record per page

At this point, if desired, have library staff review list, save it as report of items deleted.

After library staff reviews title list and gives approval:

- **Run** the *XXX Rem DISCARD by Loc* report again.
- Update Options to **CHANGE:** Update Database: **Check**

<input checked="" type="checkbox"/> Update database records

HINT: Before running it the second time, change the report name to *XXX Rem DISCARD by Loc Y*

- Run **adutext** report.