



Automated Catalog Clean-Up!

Keiley McGregor

June 11, 2024

How We Gather



- Rename with Name and Library or Town
- Share Questions in Chat
- Raise Hand to Speak



Today's Agenda

Why a clean catalog is important

What the options are for automated clean-up

How to find out more and request assistance

Today's Hosts

Keiley McGregor



MSC Trainer

(Keiley sounds like Kylee)

Colet Bartow



**MSL Continuing
Education Coordinator**

(Colet rhymes with Olay)

A clean catalog is
important.



ANSWERING PATRON & STAFF QUESTIONS

- Your website says you have this, but I can't find it...?
- What's this bill notice for?
- When I scan this item, I get a weird pop-up message. What do I do?



MSC COST-SHARE FORMULA

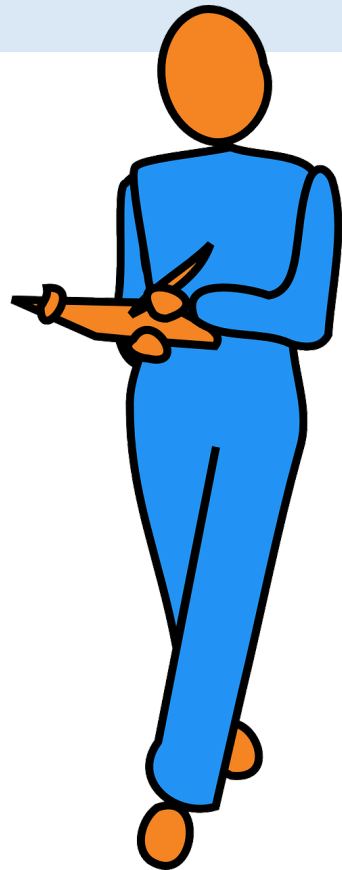
- Based on stats directly from the system:
 - title count (30%)
 - circulation count (10%)
 - patron count (30%)
- Remaining 30% divided equally among libraries.
- Cost breaks are applied based on criteria found in [Cost Share Formula in the Montana Shared Catalog](#)

Title/Item Clean-Up



Items are missing from the shelves

Scenario: you're doing inventory



System: marks the items you didn't scan missing



MISSING List

Owner: MTSCadmin

Modified:

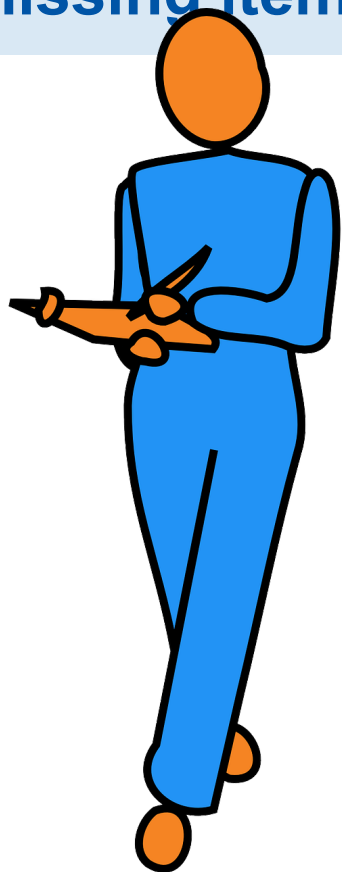
4/24/23 12:06:17 PM

Cross-listed in Circulation Folder. List of all items with a missing status.

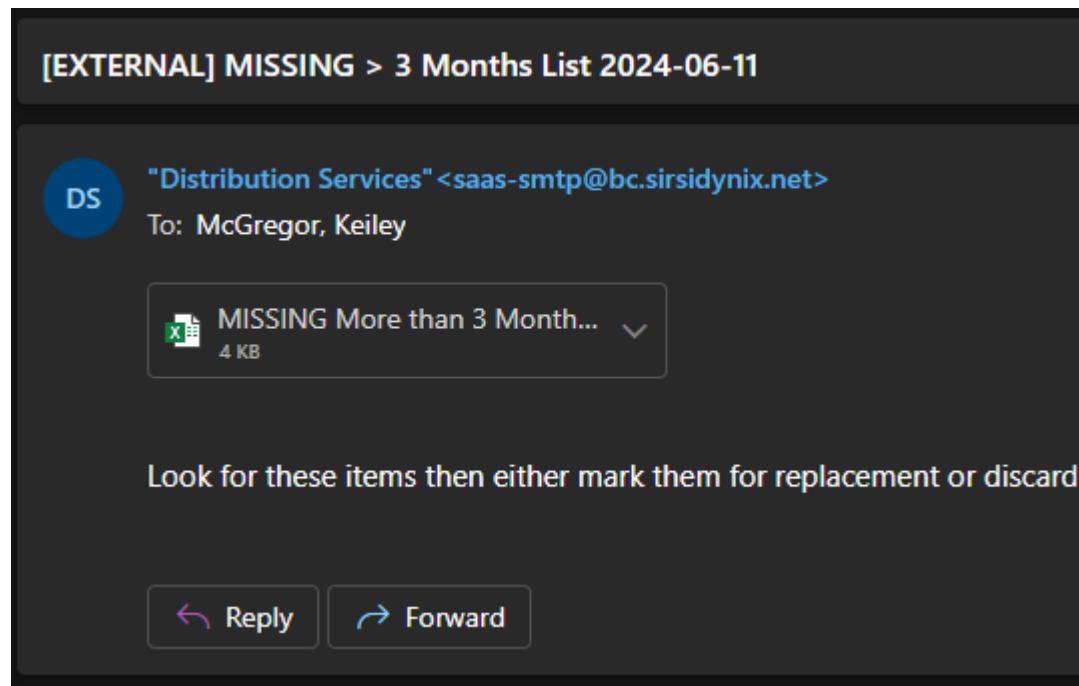
Item Status ▲	Item Collection ▲	Item Call Number ▲	Catalog Title
<u>MISSING</u>	<u>FICTION</u>	<u>FIC BROO</u>	<u>March /</u>
<u>MISSING</u>	<u>JUV-COMIC</u>	<u>JGN AVAT</u>	<u>Avatar, the las</u>
<u>MISSING</u>	<u>JUV-COMIC</u>	<u>JGN KIBU</u>	<u>Copper /</u>
<u>MISSING</u>	<u>JUV-NE</u>	<u>J 591.77 PALL 2015</u>	<u>Ultimate ocea</u>

Missing item records need to be resolved

Scenario: you forget about the missing items



System: sends you a reminder to deal with them



You decide: replace the item or remove the record?

Replace

- Purchase a replacement copy
- Add the replacement copy to the correct record.
- Remove the missing copy from system (discard or delete).



Remove the record

- Review the instructions for [Discarding vs Deleting Item Records in WorkFlows.](#)
- Discard or delete the record as appropriate.

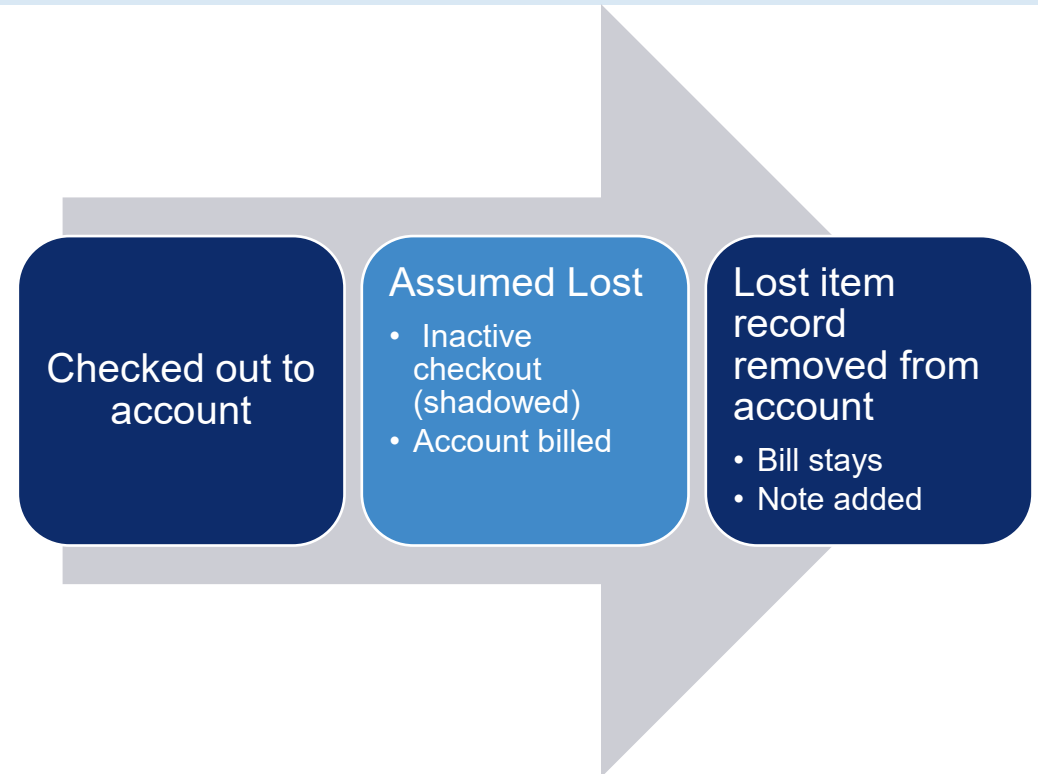
Items are lost after checkout

Scenario: a patron doesn't tell you they've lost an item



Image by [Anita S.](#) from [Pixabay.](#)

System: assumes the item is lost after a designated amount of time



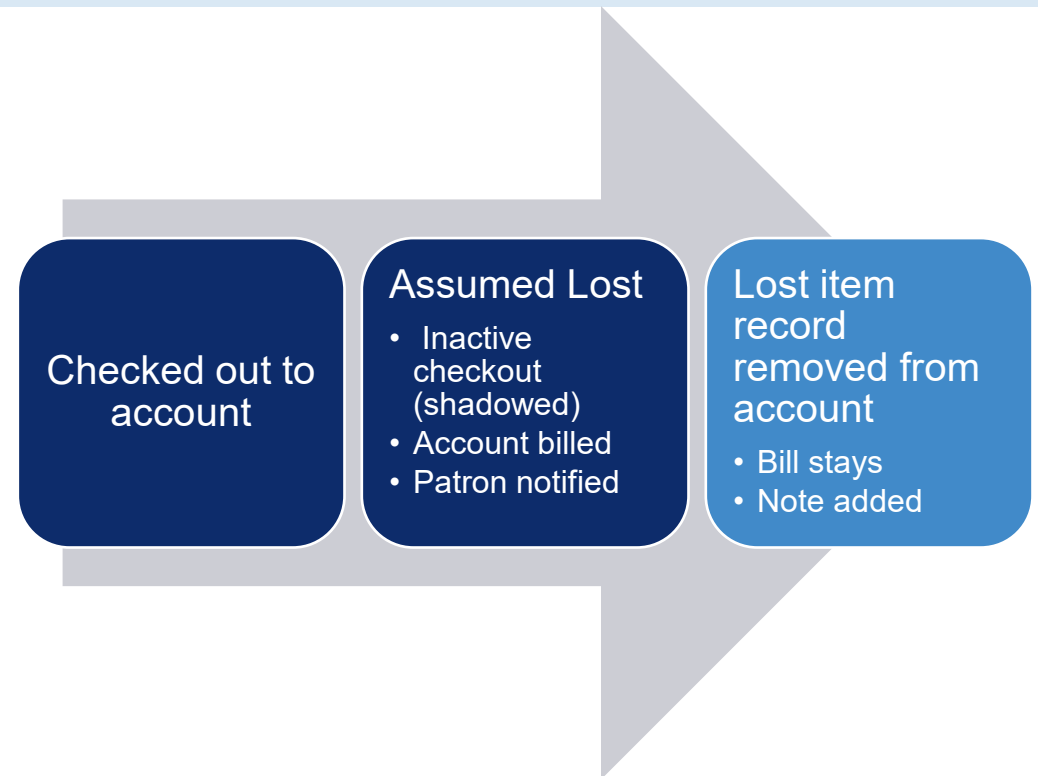
Lost item records need to be resolved

Scenario: you're blissfully ignorant about the lost item



Image by [Anita S.](#) from [Pixabay.](#)

System: assumes the lost item record needs to be dealt with after a designated amount of time

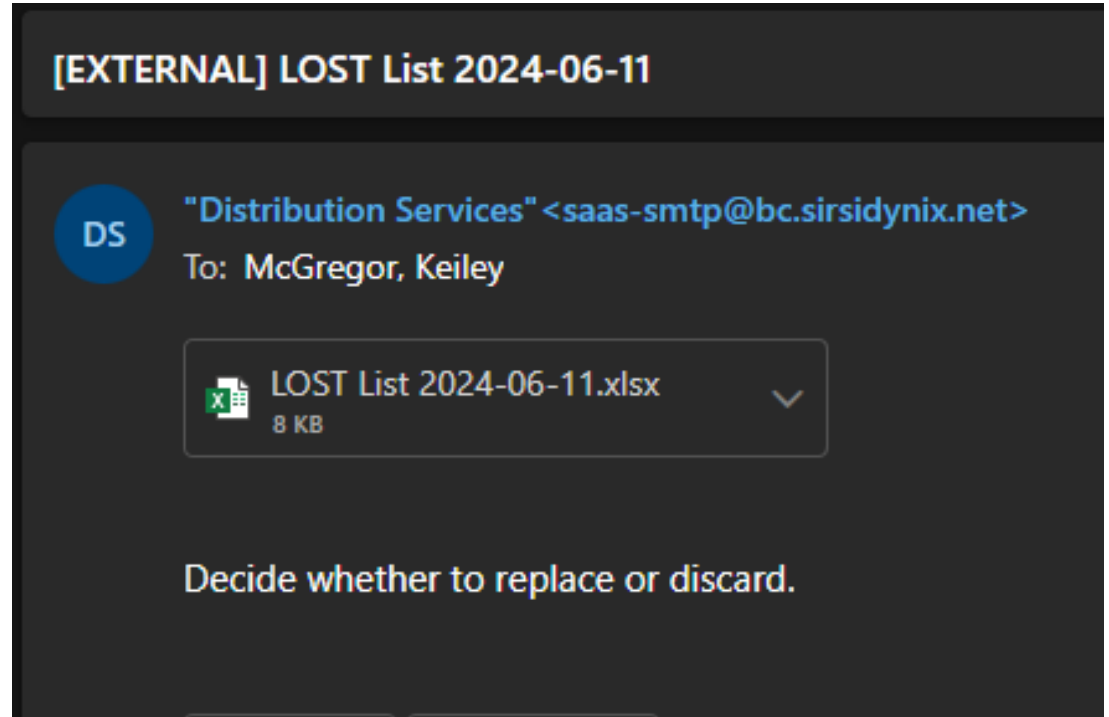


Lost item records need to be resolved

Scenario: you're still blissfully ignorant about the lost item



System: sends you a reminder to deal with lost items



You decide: replace the item or remove the record?

Replace

- Purchase a replacement copy
- Add the replacement copy to the correct record.
- Remove the lost copy from system (discard or delete).



Remove the record

- Review the instructions for [Discarding vs Deleting Item Records in WorkFlows.](#)
- Discard or delete the record as appropriate.

The system can also remind you about...

- Items still being processed
- Items still in transit
- Items still cataloged as “new”
- Items that patrons claimed to have returned
- Items waiting to be replaced
- Items about to be discarded from the system
- And more – just ask!

See instructions in [Subscribing to an Email Report in BCA](#) or [open a ticket](#) and request a subscription.



Image by [Dmitriy](#) from [Pixabay](#).

Items still being processed



Let's make bread! : a comic book cookbook

Author: Forkish, Ken author

Subject: Cooking (Bread)
Bread.

Publisher Name: Ten Speed Graphic, an imprint of
Ten Speed Press,

Physical Description: 157 pages : color illustrations ;
26 cm

Format:  Books

ISBN: 9781984860873

Actions: 

Place Hold

Staff View (MARC)

Available:

Explore Librarian Recommends, Summary, and more

Library	Call Number	Item Barcode	Item Type	Status
Belgrade Community Library	641.815 FORK 2024	33773100978702	New materials	(Material being processed)

Items still in transit

1.



Bear feels scared

Author Wilson, Karma.

Publication Date 2008

Publisher Margaret K. McElderry Books,

Format  Books

Place Hold

Bozeman Public Library	P WILSON	Book	Due 7/3/24
Three Forks Community Library	FAV. SERIES BEAR	Book	(In transit)
West Yellowstone Public Library	E WILS	Book	Easy books

Items still cataloged as “new”

1.  **Bushcraft 101 : a field guide to the art of wilderness survival** [Place Hold](#)

Author Canterbury, Dave author
Publication Date 2014
Format  Books

Library 	Call Number 	Item Type 	Status 
Belgrade Community Library	613.69 CANT 2014	New materials	Non-fiction

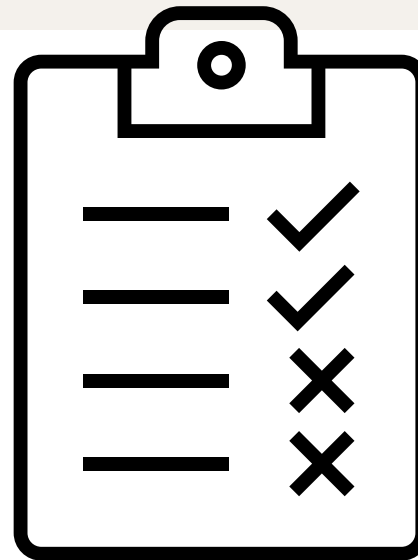
Patron Account Clean-Up



System administrators perform regular patron account clean-up

Keep an eye out for survey announcements in the MSC GovDelivery newsletter!

Inactive patrons



Student roll-ups

Questions?



Question from Chat

- When an item is Assumed Lost and our library is the only one that has a copy of that item, the record becomes unfindable via title or ISBN search. They are only findable via the item number or title control number. Why is this?
 - I looked up to confirm why the item is unable to be located via a title or author browse search and that is because the home location of LOST is shadowed. When more than one library exists on the record, depending on what you have selected for the 'in this library' dropdown, the item will still come up, but when only your copy exists on the record, the whole thing becomes shadowed so only an exact search via the item id or title control number will bring up the item.
- Would it be possible to set it up so that Assumed Lost items aren't shadowed, both to prevent findability issues and to allow patrons to continue placing holds?
 - Unfortunately no, that is a system default that we are unable to change.

Links from Chat



[Cost Share Formula](#)



[Montana Shared Catalog \(MSC\)](#)



[MSC KnowledgeBase](#)



[Subscribing to an Email Report in BCA](#)



[Open a Support Ticket](#)

Access Resources, Recording, and Claim Credits

- Visit today's event in the ASPeN Event Calendar
- Download Resources
- Access Recording
- Claim Credits



ASPeN: Library Directory

Events Search

Search by event title, location, etc

Advanced Filtering [Show](#)

[Search](#) [Reset](#)

< > today

April 2024

month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
		9a MSL Consulting and CE 10a MSC Office Hours 2p MSC Office Hours	1p MSC Content Managem		10a Sagebrush Federation	10a South Central Federati
7	8	9	10	11	12	13
		10a 2024 MSL Learn Webin	6:30p MLN Virtual Program	1p Digital Opportunities Pla	11a Broad Valleys federatio	10a Roosevelt County libra
14	15	16	17	18	19	20
			12a 2024 Montana Library Association Annual Conference 9:30a MSL Commission Me			
21	22	23	24	25	26	27
		9a MSL Consulting and CE 12h Connecting with Local		10a Golden Plains library fe	11a Spring 2024 Tamarack Federation Meeting	

MSL YouTube Channel

- Look for the MSL Learn Webinar Series Playlist
- Access new recordings
- Subscribe!

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The Montana State Library helps all organizations, communities, and Montanans thrive thr... >
msl.mt.gov

Home Videos Playlists Community

MSL Meetings

State Library Commission Meeting
May 10, 2024, 10:00 a.m. - 11:00 a.m.
62 videos

Network Advisory Council Meeting
February 1, 2023, 9:30 a.m. - 11:00 a.m.
27 videos

MT Geospatial Information Advisory Council Meeting
April 26, 2023, 10:00 a.m. - 11:00 a.m.
18 videos

MSL Commission Meetings
Public · Playlist
Updated 3 days ago
View full playlist

Network Advisory Council (NAC)
Public · Playlist
View full playlist

Montana Geospatial Information Advisory Council
Public · Playlist
View full playlist

Learn with MSL

2024 MSL Learn Webinar Series
Public · Playlist
Updated today
View full playlist

2024 Webside Chats
Public · Playlist
View full playlist

Trustee Training
Public · Playlist
Updated 7 days ago
View full playlist

2023-24 MLN Virtual Programming Series
Public · Playlist
View full playlist

MSL Data Tutorials
Public · Playlist
Updated 4 days ago
View full playlist

MSL History
Public · Playlist
Updated 5 days ago
View full playlist

Up Next



June 14 – Webside Chat at Noon



July 9 – Enhanced Records: Montana Subject Headings



July 30 - Submitting information to the Montana Natural Heritage Program using iNaturalist



Check the ASPeN Calendar

MSL Evaluation Survey



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