An Ounce of Prevention: Quality Review Reports for Alma

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Overview

• Quality review background
• General principles of writing quality review reports
• Report examples
  • Report widgets (checked daily)
  • Scheduled reports (checked monthly)
  • As needed reports
• Tips and tricks
QUALITY REVIEW
BACKGROUND
What is Quality Review?

• My term for database maintenance that combines a general knowledge of Alma Analytics, staff workflow practices, and local cataloging policy

• Depending on your library's organizational structure, the quality review process could involve several people, a few people, a formal or informal team, or one person

• Sometimes a library's database maintenance unit performs this work, among other tasks

• This presentation will focus on how GIL member libraries can use Analytics to find and correct errors in their catalogs
Why Use Quality Review?

• Allows a more proactive response in addressing catalog errors
• Ensures consistency in local cataloging practice
• Provides catalog support during disruptions in workforce continuity or when there is a loss of institutional wisdom
• Reduces clean-up tasks in the event of a system migration
• Makes it easier to respond to statistics requests from university or library leadership, annual surveys, etc.
WRITING QUALITY REVIEW REPORTS
Report Backbone – Physical Titles

Subject Area: Physical Items

• In general, UWG's physical inventory reports contain the following fields and filters:
  • "Bibliographic Details"."MMS Id"
  • "Bibliographic Details"."Title"
  • "Bibliographic Details"."OCLC Control Number (035a)"
  • "Location"."Location Name"
  • "Holding Details"."Permanent Call Number"
  • "Holding Details"."Normalized Call Number" (use if report needs to be sorted by call number; if included, hide the column)
  • "Physical Item Details"."Description"
  • "Physical Item Details"."Barcode"
  • "Physical Item Details"."Process Type"
  • "Physical Item Details"."Lifecycle" is equal to / is in Available
Subject Area: E-Inventory

- In general, UWG's electronic inventory reports contain the following fields and filters:
  - "Bibliographic Details"."MMS Id"
  - "Bibliographic Details"."Title"
  - "Bibliographic Details"."OCLC Control Number (035a)"
  - "Bibliographic Details"."Linked to CZ"
  - "Electronic Collection"."Electronic Collection Public Name"
  - "Portfolio"."Lifecycle" is equal to / is in In Repository
  - "Portfolio"."Availability" is equal to / is in Available
  - "Portfolio"."Portfolio Linked To CZ"
Writing Quality Review Reports: General Process

• Identify the problem
  • Identify the Analytics field associated with the problem
  • Identify the filter(s) on this field that will retrieve problem records

• Exclude false positives
  • Use filter(s) to exclude records that legitimately exhibit the problem
  • Add additional filters as needed to eliminate false positives in your result set
Step 1: Identify the Problem

Example: We want to find holding records that are missing a call number.
Step 2: Identify Analytics Field/Filter

Example: We want to find holding records that are missing a call number.

• Identify the Analytics field that indexes this data
  • Physical Items subject area > "Holding Details"."Permanent Call Number"

• Determine how Analytics stores missing or erroneous values for this field
  • Run a report containing the Permanent Call Number field, and apply both an ascending and descending sort; this will show you what missing values look like, and also whether any other values for that field need to be changed
  • In our example, the value for a missing call number is 'Unknown' rather than 'Is Null'
Step 3: Retrieve Problem Records

Example: We want to find holding records that are missing a call number.

• Add the 'Unknown' filter to your report to retrieve a list of all problem records
  • In this example: "Holding Details"."Permanent Call Number" is equal to / is in Unknown
• Run the report
Step 4: Exclude False Positives

Example: We want to find holding records that are missing a call number.

- Sort the columns in your report to identify common factors in records that legitimately exhibit the problem
  - At UWG, many records in our IZ-only locations, such as acq and ILL, do not have call numbers
- Add the appropriate filter(s) to eliminate these false positives from your result set
  - In this example, UWG uses the filter "Location"."Location Name" is not equal to / is not in Reserves;ILL;Acquisitions, since these are locations that properly do not use call numbers
## Options for Checking Reports

<table>
<thead>
<tr>
<th>Analytics object</th>
<th>How to access</th>
<th>Advantages</th>
<th>Disadvantages</th>
<th>How UWG uses</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Widget</strong></td>
<td>Alma home page</td>
<td>Loads when you log in to Alma; opens in Analytics</td>
<td>May clutter your Alma home page; cannot be used for dashboards</td>
<td>Daily reports</td>
</tr>
<tr>
<td><strong>Report; Dashboard</strong></td>
<td>Analytics &gt; Reports</td>
<td>Runs only when you click menu link; opens in Analytics</td>
<td>Somewhat hidden in Analytics menu</td>
<td>An alternative to widgets</td>
</tr>
<tr>
<td><strong>Data Visualization</strong></td>
<td>Analytics &gt; Data Visualizations</td>
<td>Runs only when you click menu link; opens in DV</td>
<td></td>
<td>(not used)</td>
</tr>
<tr>
<td><strong>Scheduled report</strong></td>
<td>Email</td>
<td>Alma login not required to view report</td>
<td>File size limit of 2 MB (uncompr.) or 7 MB (compressed)</td>
<td>Monthly reports; for less common issues</td>
</tr>
</tbody>
</table>
REPORT WIDGETS
Analytics Usage Tracking

• Report widgets will run each time you log in to Alma
• These reports are counted as part of the 'Num of Queries' user tracking measure in the Analytics Usage Tracking (AUT) subject area
  • This subject area is only available if you have enabled the enable_usage_tracking parameter under Configuration > Analytics > Other Settings
• Tip: If you use the AUT subject area to measure your productivity for annual evaluations or other purposes, add the 'Object Type' field to your report to distinguish between dashboards, product embedded reports, reports, scheduled reports, and widgets
Barcoded Items Lacking OCLC Number, Call Number, Item Policy, or Item Material Type

• Purpose: This report finds records that lack key fields in the bib/item record
• Action: Cataloging staff check the shelf and add the missing information
Barcoded Items Lacking OCLC Number, Call Number, Item Policy, or Material Type: Report Filters

• Main filters: "Physical Item Details"."Material Type" is None' OR 'Item Policy is None' OR 'Permanent Call Number is Unknown'
  • To add OR operator, add a new filter like usual, and then click 'AND' to change it to 'OR'
• Filter to include NZ-linked records:
  • Network ID is not null
• Exclude any NZ records that legitimately do not have an OCLC number, call number, material type, or item policy:
  • UWG excludes records with the 'Acquisition' process type, as well as unbarcoded items
Network Records in IZ

- **Purpose:** This report finds IZ records that should be linked to the NZ
- **Action:** Cataloging staff link the record to the NZ
Network Records in IZ: Report Filters

- Main filters: 'Network ID is null' and 'OCLC Control Number (035a) is not null'
- Next, add filters to exclude records that are legitimately in the IZ. Examples:
  - Exclude IZ locations, such as reserves, acquisitions, ILL
  - Exclude any boundwith host records
    - Example: UWG uses Local Param 03 to map our 976 field, which is found only in boundwith host records. Therefore we add the filter 'Local Param 03 is null'
  - Exclude any IZ test records
    - In UWG's case, these records were holdovers from our early days, when we did not have a sandbox
- Depending on your local policies, also exclude:
  - Lost or missing titles, if it is your policy to unlink these records from the NZ
Lost Item Maintenance

• Purpose: This report finds records for which the item has been lost for at least one year
• Action: Cataloging staff suppress the bib (in most cases) and delete OCLC holdings
Lost Item Maintenance: Report Filters

- Main filter: Process Type is equal to / is in **Lost**
- Also add SQL filter: "Physical Item Details"."Process Type Date (Calendar)" BETWEEN current_date - 400 AND current_date – 365
  - This filter will return items lost more than 365 days ago, but fewer than 400 days ago
  - I add 400 days as an upper limit so that records whose bibs cannot be suppressed will eventually drop off the report (examples: serials; multi-parts; titles with additional copies)
- "Bibliographic Details"."Suppressed From Discovery" is equal to / is in **No**
- "Holding Details"."Suppressed from Discovery" is equal to / is in **0**
Add SQL Filter: Step 1

- Click 'Create Filter' icon in Filters pane and select 'More columns'
  - In my experience, for this filter it doesn't matter whether you use the field 'Process Type Date' or 'Process Type Date (Calendar)'

![Filters pane with options]

- Filters:
  - Process Type is equal to / is in Lost
  - Lifecycle is equal to / is in Active
  - Suppressed From Discovery is equal to / is in No
  - Suppressed from Discovery is equal to / is in 0

- More Columns button is highlighted
Add SQL Filter: Step 2

- Double-click to expand 'Physical Item Details' folder
Add SQL Filter: Step 3

- Double-click to select 'Process Type Date (Calendar)'

![Select Column window with Process Type Date (Calendar) highlighted]
Add SQL Filter: Step 4

- Check box next to 'Convert this filter to SQL'
Add SQL Filter: Step 5

• Erase the equals sign (=) and paste the following text:

BETWEEN current_date - 400 AND current_date - 365
Missing Item Maintenance

• Purpose: This report finds records for which the item has been missing for at least 90 days
• Action: Cataloging staff suppress the record and delete OCLC holdings

<table>
<thead>
<tr>
<th>Physical Item Details</th>
<th>Bibliographic Details</th>
<th>Physical Item Details</th>
<th>Bibliographic Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode</td>
<td>OCLC Control Number (035a)</td>
<td>Vol./Year</td>
<td>Copy #</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Title</td>
</tr>
</tbody>
</table>

Filters

- Process Type is equal to / is in Missing
- Lifecycle is equal to / is in Active
- "Physical Item Details"."Process Type Date (Calendar)" BETWEEN current_date - 125 AND current_date - 90
- Suppressed From Discovery is equal to / is in No
- Suppressed from Discovery is equal to / is in 0
Missing Item Maintenance: Report Filters

• Main filter: Process Type is equal to / is in Missing
• Also add SQL filter: "Physical Item Details"."Process Type Date" BETWEEN current_date - 125 AND current_date – 90
  • This filter will return items marked missing more than 90 days ago, but fewer than 125 days ago
  • Like the lost report, we add 125 days as an upper limit so that records whose bibs cannot be suppressed will eventually drop off the report
• "Bibliographic Details"."Suppressed From Discovery" is equal to / is in No
• "Holding Details"."Suppressed from Discovery" is equal to / is in 0
Records Suppressed in Error

- Purpose: This report finds suppressed records for recently returned lost items and recently scanned in missing items
- Action: Cataloging staff unsuppress record and add OCLC holdings

<table>
<thead>
<tr>
<th>Bibliographic Details</th>
<th>Location</th>
<th>Physical Item Details</th>
<th>Holding Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Location Name</td>
<td>Process Type</td>
<td>Normalized Call Number</td>
</tr>
</tbody>
</table>

**Filters**

- Suppressed From Discovery is equal to / is in Yes
- Lifecycle is equal to / is in Active
- Process Type is not equal to / is not in Acquisition; Lost; Missing; Technical - Migration
- Location Name is equal to / is in Atlas Stand; Browsing; Cataloging; DVD Collection; Display; Fiction; Folio; Georgia History Reference Collection; Government Doc-CD; Government Doc-Fiche; Government Doc-Maps; Government Doc-Office; Government Doc-Ref; Government Doc-Storage; Government Docs-Oversize Books; Government Documents; Juvenile Easy Books; Juvenile Fiction; Juvenile Nonfiction; Maps; Music; Periodicals; Periodicals-Microform; QEP; Ready Reference; Recommended Books; Reference-Indexes; Special Coll Offsite Storage; Special Coll-Reading Room; Special Coll-folio; Special Coll-map; Special Coll-oversize; Special Collections; Stacks
- Network Id is not null
Records Suppressed in Error: Report Filters

- "Bibliographic Details"."Suppressed From Discovery" is equal to / is in Yes
- Lifecycle is equal to / is in Active
- Exclude legitimately suppressed records:
  - In process, lost, missing items: Process Type is not equal to / is not in Acquisition;Lost;Missing;Technical - Migration
  - Location Name is equal to / is in [list the locations at your library that are not suppressed locations]
  - Network Id is not null
    - UWG uses this filter to exclude our IZ records, as many are suppressed per local or consortial policy, e.g., acquisitions order records, boundwith host records, and govdoc shipping list records
SCHEDULED REPORTS
Scheduling a Report

• You can **schedule** reports to be emailed to you or others (who don't have to be Alma users), on a daily, weekly, or monthly basis

• Reports can be sent in PDF, Excel, Text, or CSV format

• This is a good option for problems that crop up occasionally or don’t affect patron discovery of materials
**Holding Records With No Items**

- This report is available in Shared Folders > Alma > Inventory > Reports
- Action: Delete the holding or add item(s)

<table>
<thead>
<tr>
<th>Selected Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibliographic Details</td>
</tr>
<tr>
<td>MMS Id</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lifecycle is equal to / is in In Repository AND Num of Physical Items (Active) is equal to / is in 0 AND Num of Holdings (Active) is greater than or equal to 1</td>
</tr>
</tbody>
</table>
Purpose: This report finds holding records that were not unsuppressed when a lost or missing item was returned or found (these records are a holdover from Voyager, when we added additional copies on separate holding records)

Action: Cataloging staff unsuppress the holding and may also 1) move additional copies to a single holding and 2) delete 852 $t
Available Items Attached to Suppressed Holdings: Filters

- "Holding Details"."Suppressed from Discovery" is equal to / is in 1
- Exclude items that are legitimately attached to suppressed holdings:
  - Process Type is equal to / is in None (i.e., items are not lost, missing, in repair, etc.)
- Lifecycle is equal to / is in Active
- Exclude suppressed locations
"AS NEEDED" REPORTS
Running 'As Needed' Reports

- These reports can be run directly from Analytics or added as a 'Report' object type for easy access from your Alma home page
- UWG stores these reports in a 'Quality Review' subfolder in our institutional shared 'Cataloging' folder, which also contains all reports used as Analytics objects in Alma
In Transit Items Over 120 Days

Subject area: Requests

• Purpose: This report finds one-time physical items that were received by Acquisitions more than four months ago but have not been scanned in at the circulation desk

• Action: Search for the items in the report
  • If found on shelf, scan in the item (Fulfillment > Resource Requests > Scan In Items)
  • If not on shelf, check with Cataloging and Acquisitions, then initiate search process
In Transit Items Over 120 Days: Rationale

• This report takes advantage of the fact that when Acquisitions receives an item:
  • the PO line is marked as received (for one-time items; it remains open for standing order titles);
  • the item is placed into transit from the Acquisitions department to the item's home circulation desk; and
  • a 'Transit For Reshelving' request is initiated, with the receiving operator as the request creator, and the receiving unit as the request managing department

• Since this workflow triggers a request, we can use the Requests subject area to define more filters for our report
In Transit Items Over 120 Days: Fields to Add

- MMS ID
- Title
- We add these fields to search for the item:
  - Permanent Physical Location Code
  - Permanent Call Number
  - Description
  - Barcode
- Receiving Date (calendar)
  - The receiving date is also the Request Date
- Request Status
- Managed by Unit (latest step)
- Pickup Location
- Transit Item Time (Days)
  - Tip: Add a descending sort to see oldest requests first
In Transit Items Over 120 Days: Filters

• Filter to include only active requests, i.e., items that have not yet been scanned in at their home location
  • Request Status is not equal to / is not in Completed
• Filter to define the minimum transit time
  • Transit Item Time (Days) is greater than or equal to 120
• Filters to define where materials are coming from, and where they are going:
  • Managed by Unit (latest step) is equal to / is in receiving department
  • Pickup location is equal to / is in destination library (or, less commonly, work order department)
• Lifecycle is equal to / is in Active
Missing or Invalid Fixed Fields

- This is a group of reports that find bib records with invalid or absent MARC fixed length data fields:
  - DtSt (008/06)
  - Date1 (008/07-10)
  - Date2 (008/11-14)
  - Lang (008/35-37)
- Although these reports focus on only a few fixed fields, there is sometimes other incorrect or outdated content in the affected records
- Tip: If you receive a multi-match error when exporting from Connexion, submit a ticket to the GIL Cataloging Team Support Portal
## Fixed Fields - Common Problems

<table>
<thead>
<tr>
<th>Analytics Report</th>
<th>Examples of Invalid Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>008/06 (DtSt)</td>
<td></td>
</tr>
<tr>
<td>008/07-10 (Date1)</td>
<td>blank;</td>
</tr>
<tr>
<td>008/11-14 (Date2)</td>
<td>blank; 0000</td>
</tr>
<tr>
<td>008/35-37 (Lang)</td>
<td>blank</td>
</tr>
</tbody>
</table>
Date Type (008/06)

- **DtSt codes** (OCLC Bibliographic Formats and Standards)
- Fields to add
  - From Bibliographic Details folder: MMS ID, Title, OCLC Number (035a), Resource Type, Type of Date, Begin Publication Date, End Publication Date
- Filters
  - Lifecycle is equal to / is in **Active**
  - Network Id **is not null**
  - 'Type of date is equal to / is in 0;1;_;' OR 'Type of date **is null**'
    - These codes will change from time to time; see the following slides for an easy way to search for invalid codes
Finding Invalid Codes: Step 1

- Click the gear icon on the 'Type of date' field and select 'Filter'
Finding Invalid Codes: Step 2

• Click the magnifying glass to see all possible values:
Finding Invalid Codes: Step 3

- Search the list of available values, highlight any suspect codes, and click the single arrow (>) to move them to the 'Selected' pane:
Finding Invalid Codes: Step 4

- Click OK twice to save the filter, and then run the report
- Often records will have problems with all 3 fixed fields: DtSt, Date1, and Date2

<table>
<thead>
<tr>
<th>MMS Id</th>
<th>OCLC Control Number (035a)</th>
<th>Title</th>
<th>Material Type</th>
<th>Resource Type</th>
<th>Type of date (DtSt, 008/06)</th>
<th>Begin Publication Date (Date1, 008/07-10)</th>
<th>End Publication Date (Date2, 008/11-14)</th>
</tr>
</thead>
<tbody>
<tr>
<td>991621174602961</td>
<td>1047450</td>
<td>Canaris; the biography of Admiral Canaris, chief of German Military Intelligence in the Second World War.</td>
<td>Book</td>
<td>Book - Physical</td>
<td></td>
<td>1974</td>
<td></td>
</tr>
<tr>
<td>991622754602961</td>
<td>1052619</td>
<td>Cowboys; the real story of cowboys and cattlemen</td>
<td>Book</td>
<td>Book - Physical</td>
<td></td>
<td>1974</td>
<td></td>
</tr>
<tr>
<td>991645594602961</td>
<td>1107468</td>
<td>Living poor with style.</td>
<td>Book</td>
<td>Book - Physical</td>
<td></td>
<td>1972</td>
<td></td>
</tr>
<tr>
<td>991645974602961</td>
<td>1108651</td>
<td>Calm and clear.</td>
<td>Book</td>
<td>Book - Physical</td>
<td></td>
<td>1973</td>
<td></td>
</tr>
<tr>
<td>992613284602961</td>
<td>1252175</td>
<td>The theology of Paul Tillich,</td>
<td>Book</td>
<td>Book - Physical</td>
<td></td>
<td>1961</td>
<td></td>
</tr>
</tbody>
</table>
Date1 and Date2 (008/07-14)

- Assigned concurrently with the DtSt code; therefore some records may legitimately have a blank value or only two digits
  - Empty Date1 or Date2 with DtSt = b (BCE date)
  - Two-digit code in Date2 with DtSt = e (Detailed date)
  - Empty Date2 with DtSt = s
- See [here](#) for valid Date1, Date 2, and DtSt combinations
- In your Analytics report filter, select all the codes that are not listed at the OCLC link above
Date1 (008/07-10) Report

- Fields to add from Bibliographic Details folder: MMS ID, Title, OCLC Number (035a), Resource Type, Type of Date, Begin Publication Date, End Publication Date

- Filters
  - Lifecycle is equal to / is in **Active**
  - Network Id **is not null**
  - 'Begin Publication Date is equal to / is in 179;4;400;959;d; || | | ;uuve;184;####;0;0000;124;158;169' OR 'Begin Publication Date is **null**'
Date2 (008/11-14) Report

• Fields to add from Bibliographic Details folder: MMS ID, Title, OCLC Number (035a), Resource Type, Type of Date, Begin Publication Date, End Publication Date

• Filters
  • Lifecycle is equal to / is in **Active**
  • Network Id **is not null**
  • 'End Publication Date **is null**' OR 'End Publication Date is equal to / is in
    n;####;0;0000;0098;01;0103;02;0203;03;0303;04;05;0522;06;07;0731;08;09;10;11;12'
  • Type of date is not equal to / is not in **e;s**
    • Code 'e' (detailed date) is excluded because its associated Date2 code often begins with 0
    • Code 's' (single date) is excluded because its associated Date2 is blank
Language (008/35-37)

- **Lang codes** (LOC MARC Standards)
- In your Analytics report filter, select all the codes that are not listed at the link above

  - The example filter on the next page shows the invalid Lang codes in UWG's database; your filter may look different
Language (008/35-37) Report

- Fields to add from Bibliographic Details folder: MMS ID, Title, OCLC Number (035a), Resource Type, Type of Date, Language Code

- Filters
  - Lifecycle is equal to / is in **Active**
  - Network Id **is not null**
  - 'Language Code **is null**' OR 'Language Code is equal to / is in - N;0 0;0 1;000;0en;1 0;N/A;\n  |;|ng;|re;| | |;en;na;en;g;g'
Invalid Language Code (008/35-37)
Alternate Method: Step 1

• Search for all records in your database: MMS ID > 1
  • UWG excludes electronic titles
Invalid Language Code (008/35-37)
Alternate Method: Step 2

- Open the Facets sidebar:
Alternate Method: Step 3

- Expand the Language facet and browse for language codes that are not correct
  - In this list, the "aut" code is suspect
Serials Foreign Agency Cataloging

- **Purpose:** This report finds serial records with a language of cataloging other than English (040 $b \neq \text{eng})
- **Action:** Add an English language cataloging record per OCLC's policy for parallel records

![Table of Bibographic Details, Location, Holding Details, and Physical Item Details]

**Filters**

- Lifecycle is equal to / is in Active
- Language Of Cataloging is not equal to / is not in None; English
- Material Type is equal to / is in Journal
- Location Name is not equal to / is not in 10 Hour Keys; 2 Hour Course Reserves; 4 Hour Course Reserves; Acquisitions; Borrowing Resource Sharing Requests; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; None; Reserve; Serials Department; Short Loan
Serials Foreign Agency Cataloging: Report

- **Fields to add**
  - Language of Cataloging
  - OCLC Control Number (035a)
  - Location Name
  - Normalized Call Number (sort ascending; hide column)
  - Permanent Call Number
  - Description
  - Barcode

- **Filters**
  - Lifecycle is equal to / is in **Active**
  - Exclude records that lack an 040 or 040 $b
    - Language of Cataloging is not equal to / is not in **None;English**
  - "Bibliographic Details"."Material Type" is equal to / is in **Journal**
  - Location Name is not equal to / is not in **[reserves, ILL, or any other locations with records that do not need to be corrected]**
Portfolios Attached to Physical Bibs

• Purpose: This report finds electronic bibs that have been miscoded or not properly indexed
• Action: Investigate and report any errors to Alma's Data Services Team (per GIL policy, do not edit CZ records)
Portfolios Attached to Physical Bibs: Report

Subject area: E-Inventory

• Fields to add
  • MMS ID
  • Title
  • Creator
  • Linked to CZ
  • Portfolio linked to CZ
  • Electronic Collection Name

• Filters
  • "Portfolio"."Lifecycle" is equal to / is in In Repository
  • Resource Type is equal to / is in Book - Physical
  • Bibliographic Lifecycle is equal to / is in In Repository
  • Availability is equal to / is in Available
Unsuppressed Records with P and E Inventory

- **Purpose:** This report finds records with both physical and electronic inventory
- **Action:** Move the inventory to the appropriate bib record

![Image of filters and data table with conditions: Num of Portfolios (Active) is greater than 0, Num of Physical Items (Active) is greater than 0, Lifecycle is equal to / is in In Repository, Suppressed From Discovery is equal to / is in No]
Unsuppressed Records with P and E Inventory: Report

Subject Area: Titles

• Fields to add
  • Num of Physical Items (Active)
  • Num of Portfolios (Active)
  • Title (Filing)
  • MMS ID

• Filters
  • Num of Portfolios (Active) is greater than 0
  • Num of Physical Items (Active) is greater than 0
  • "Bibliographic Details"."Lifecycle" is equal to / is in In Repository
  • "Bibliographic Details"."Suppressed From Discovery" is equal to / is in No
Item Description Fields with Initial Space

- This was surprisingly common; I cleaned up a number of records and continue to monitor this issue.
- Action: Delete the initial space so that items sort properly in the Primo display.
Item Description Fields with Initial Space: Report

- **Fields to add**
  - Barcode
  - Description
  - Chron I
  - Enum A
  - Physical Item ID
    - This field is used to identify item records for received periodical issues, which UWG does not barcode

- **Filters**
  - Lifecycle is equal to / is in **Active**
  - Add the following filters separated by 'OR' rather than 'AND':
    - Enum A begins with (space)
    - Chron I begins with (space)
    - Description begins with ;#;,,,.  [note: the first value is a space]
      - The semicolons mean that values are separated with 'OR'
      - We exclude a beginning parenthesis from this list because many of our Description fields properly begin with this character, e.g., (2011 Oct. 1-30)
Summary and Tips

- Use problems reported by users and colleagues as springboards to investigate an issue
- In Analytics, consider creating a shared folder dedicated to your quality review reports
- Add a note to reports used as Analytics objects to prevent the name and location of the report from being accidentally changed
- Use widgets sparingly
- Consider the ramifications of a problem—such as patron access to resources, the potential number of records affected, and the ability to run accurate statistical reports—when deciding how often to monitor your database for that problem
QUESTIONS?