

An Ounce of Prevention: Quality Review Reports for Alma

GUGM 2022

Miriam Nauenburg
Serials and Electronic Resources Cataloger
University of West Georgia
nauen@westga.edu

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**

Report Backbone – Electronic Titles

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

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

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

The screenshot displays a report configuration interface with two main sections: Selected Columns and Filters.

Selected Columns:

Bibliographic Details	Physical Item Details	Holding Details	Bibliographic Details
Title	Barcode	Permanent Call Number	OCLC Control Number (035a)

Filters:

- Process Type is not equal to / is not in Acquisition
- AND Network Id is not null
- AND Barcode is not null
- AND
 - Material Type is equal to / is in None
 - OR Item Policy is equal to / is in None
 - OR Permanent Call Number is equal to / is in Unknown
 - OR Network Number is null
- AND Lifecycle is equal to / is in Active

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

Bibliographic Details		Location	Holding Details	Physical Item Details		
Title	OCLC Control Number (035a)	Location Name	Permanent Call Number	Barcode	Process Type	Description

▲ Filters

▼ Location Name is not equal to / is not in 3 Days Course Reserves; 3 Hour Course Reserves; 7 Days Course Reserves; Storage; Withdrawn; 10 Hour Keys; 2 Hour Course Reserves; 4 Hour Course Reserves; Acquisitions; Borrowing Resource Sharing Requests; Director; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; Newnan; None; Reserves; Self Check; Serials Department; Short Loan

AND ▼ Lifecycle is equal to / is in Active

AND ▼ Local Param 03 is null

AND ▼ Process Type is not equal to / is not in Acquisition; Lost; Missing; Technical - Migration; Transit

AND ▼ OCLC Control Number (035a) is not null

AND ▼ Title is not LIKE (pattern match) %test record%













AND ▼ Network Id is null

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

Physical Item Details			Bibliographic Details		
 Barcode 	 Vol./Year 	 Copy # 	 Title 	 MMS Id 	 OCLC Control Number (035a) 

▲ **Filters**

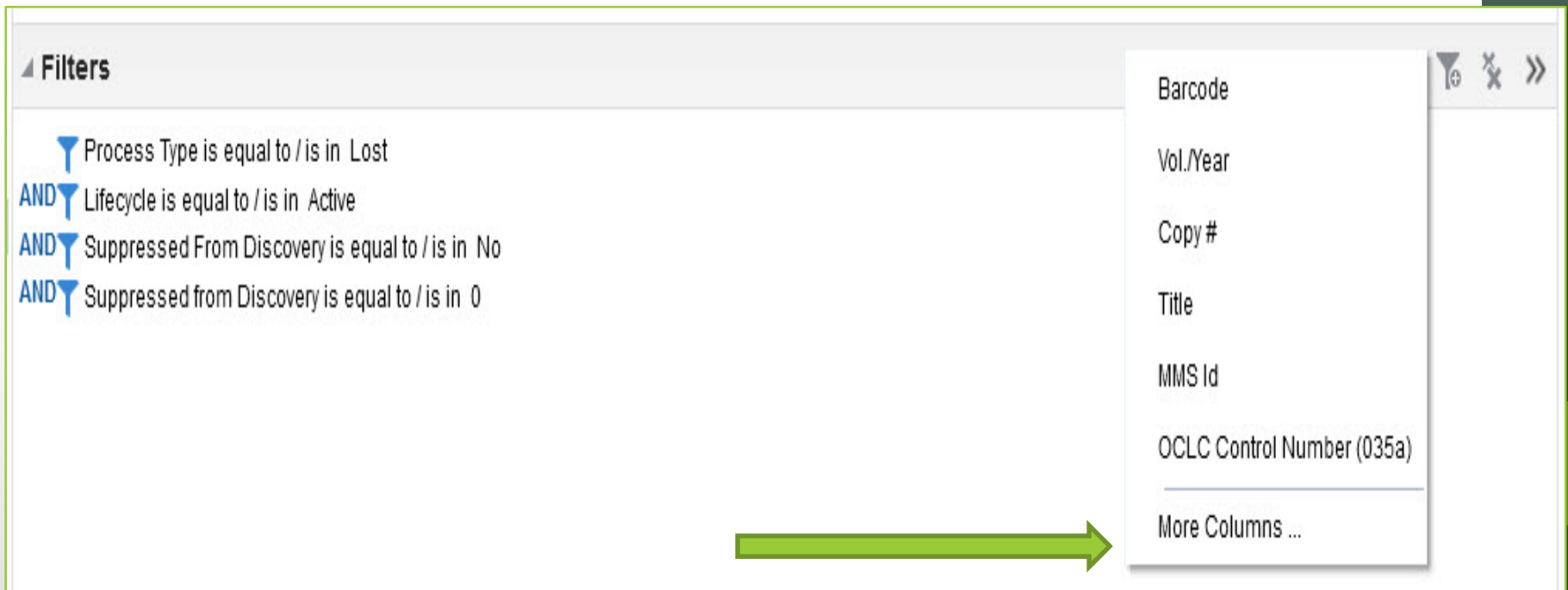
- ▼ Process Type is equal to / is in Lost
- AND ▼ Lifecycle is equal to / is in Active
- AND ▼ "Physical Item Details"."Process Type Date (Calendar)" BETWEEN current_date - 400 AND current_date - 365
- AND ▼ Suppressed From Discovery is equal to / is in No
- AND ▼ Suppressed from Discovery is equal to / is in 0

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)'



The screenshot shows a software interface with a 'Filters' pane on the left and a dropdown menu on the right. The 'Filters' pane contains four filter rules, each with a blue downward arrow icon and the word 'AND' in blue text:

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

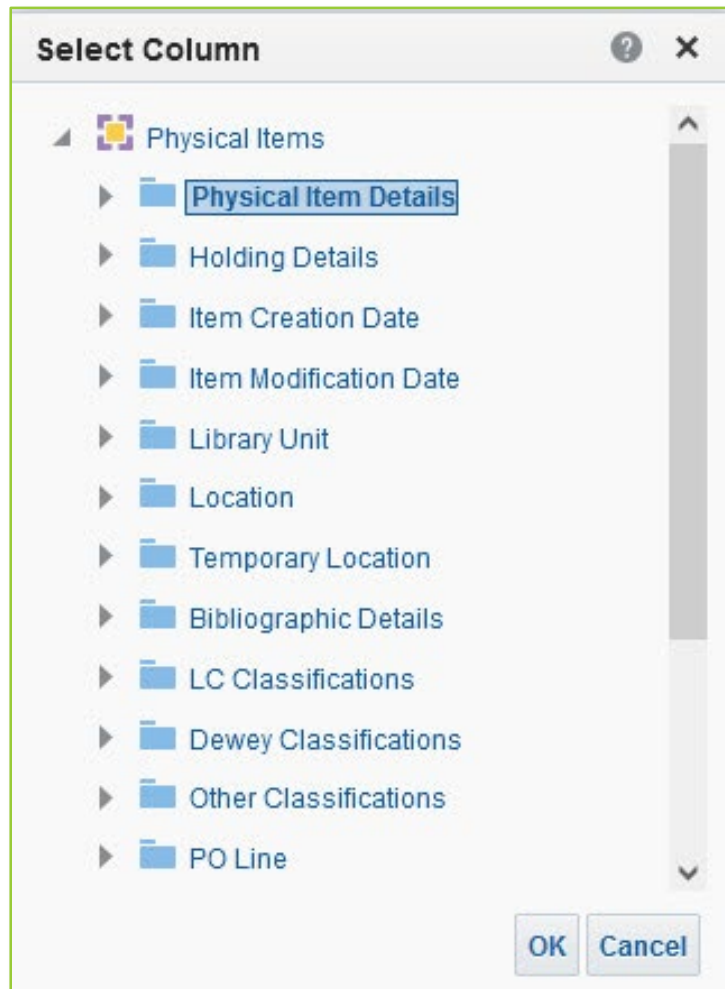
The dropdown menu on the right is open and lists several columns:

- Barcode
- Vol./Year
- Copy #
- Title
- MMS Id
- OCLC Control Number (035a)
- More Columns ...

A green arrow points from the bottom center of the interface towards the 'More Columns ...' option in the dropdown menu.

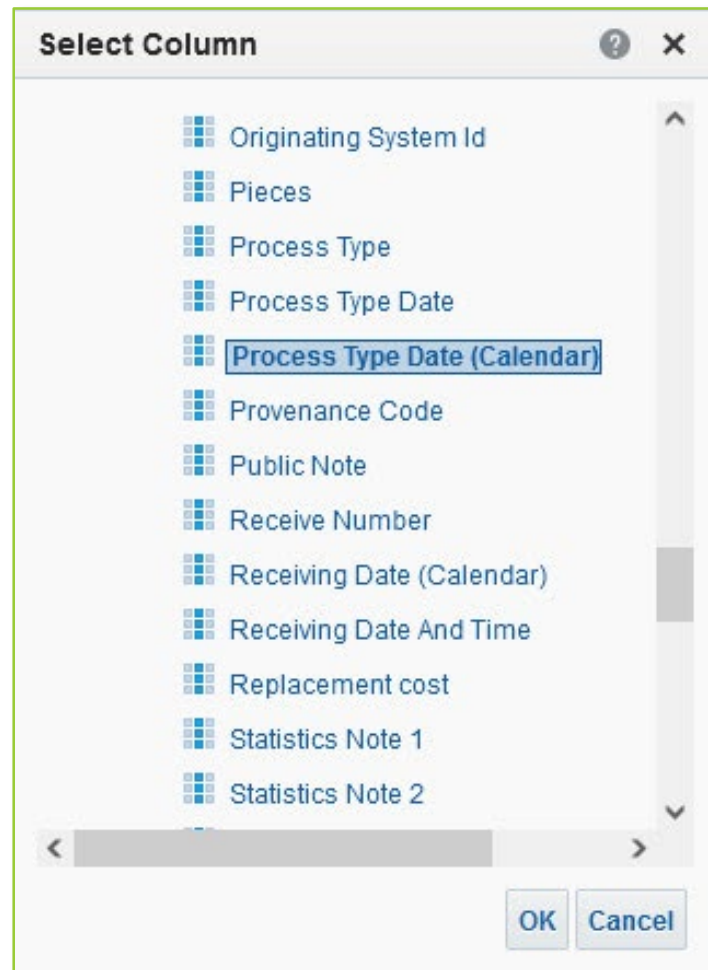
Add SQL Filter: Step 2

- Double-click to expand 'Physical Item Details' folder



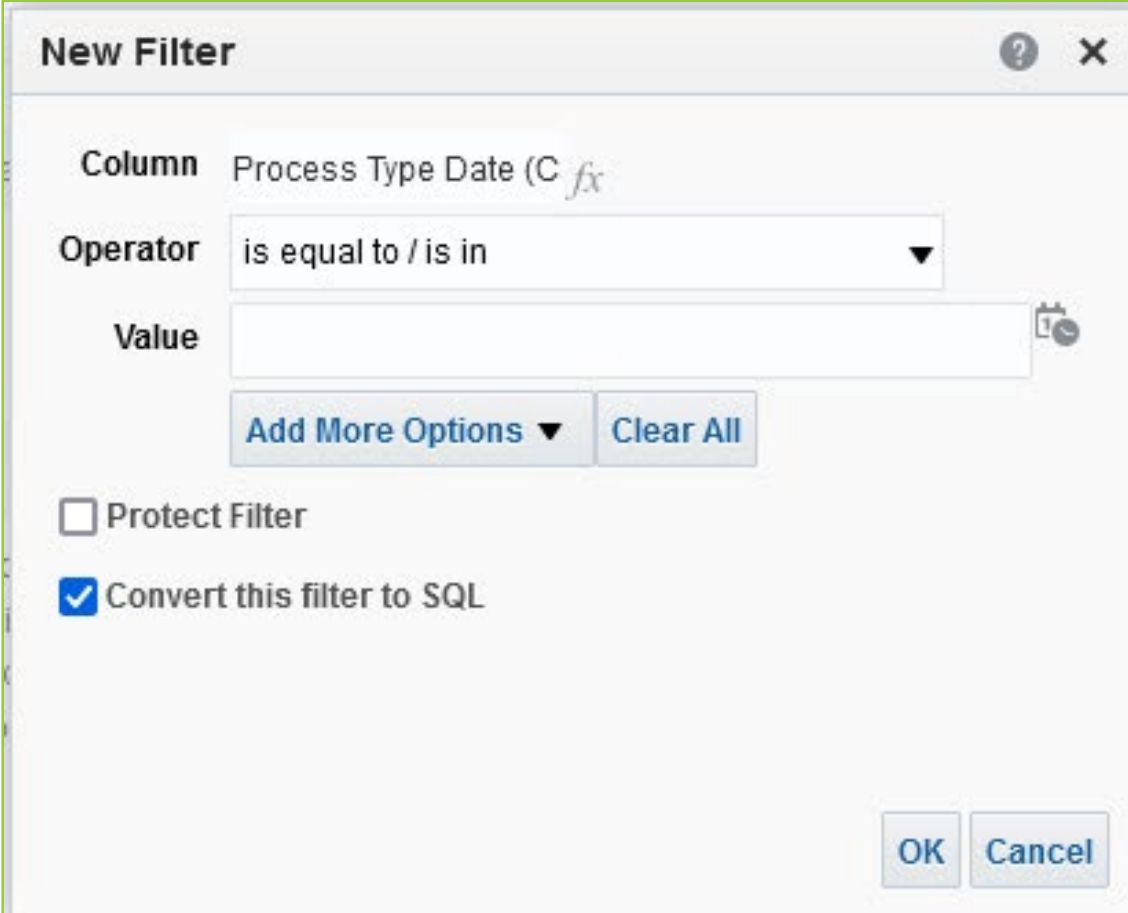
Add SQL Filter: Step 3

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



Add SQL Filter: Step 4

- Check box next to 'Convert this filter to SQL'



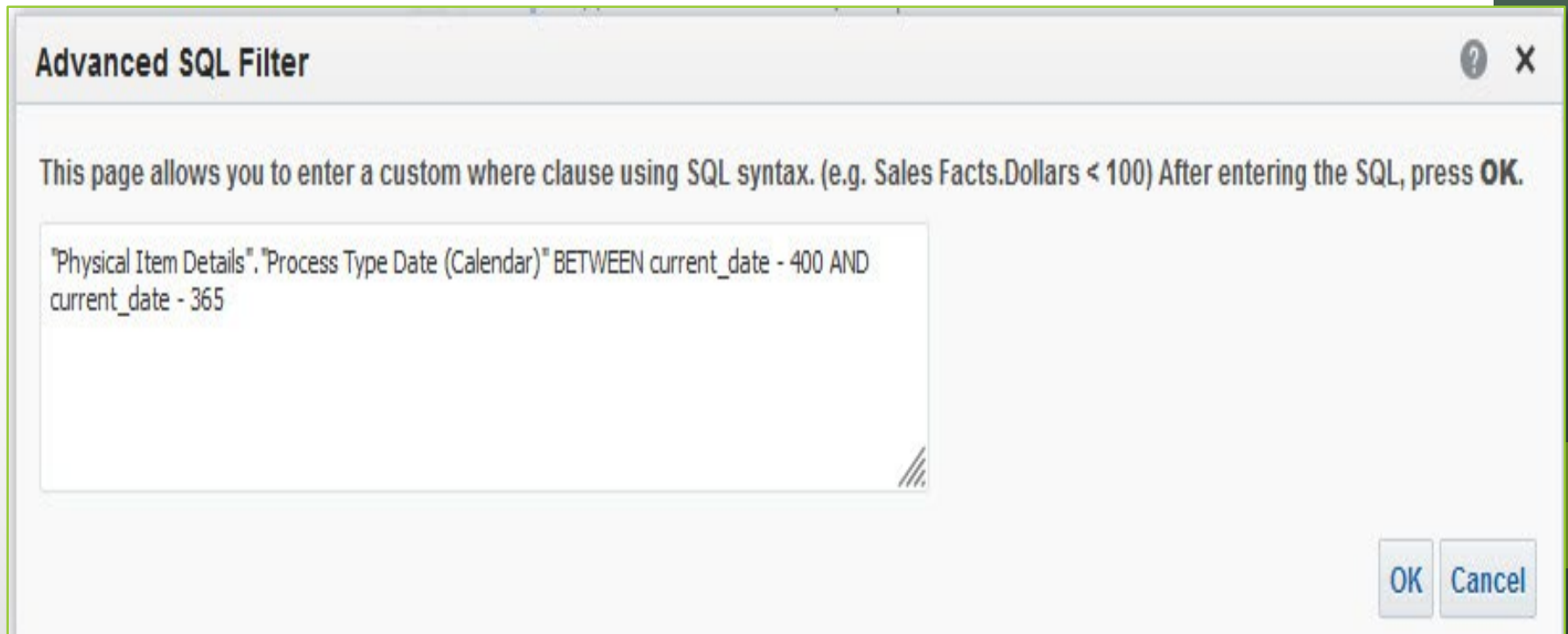
The screenshot shows a 'New Filter' dialog box with the following fields and options:

- Column:** Process Type Date (C *fx*)
- Operator:** is equal to / is in
- Value:** (empty text box with a calendar icon)
- Buttons:** Add More Options (dropdown), Clear All
- Options:**
 - Protect Filter
 - Convert this filter to SQL
- Bottom Buttons:** OK, Cancel

Add SQL Filter: Step 5

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

BETWEEN current_date - 400 AND current_date - 365



Advanced SQL Filter ? X











This page allows you to enter a custom where clause using SQL syntax. (e.g. Sales Facts.Dollars < 100) After entering the SQL, press **OK**.

"Physical Item Details". "Process Type Date (Calendar)" BETWEEN current_date - 400 AND current_date - 365

OK Cancel

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

Physical Item Details	Bibliographic Details	Physical Item Details	Bibliographic Details
 Barcode 	 OCLC Control Number (035a) 	 Vol./Year 	 Copy # 
			 Title 

▲ **Filters**

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

Bibliographic Details		Location	Physical Item Details	Holding Details	
Title	MMS Id	1 Location Name	Process Type	2 Normalized Call Number	Permanent Call Number

▲ Filters

Suppressed From Discovery is equal to / is in Yes

AND Lifecycle is equal to / is in Active

AND Process Type is not equal to / is not in Acquisition; Lost; Missing; Technical - Migration

AND 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

AND 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)

Selected Columns

Bibliographic Details	Title Details	Title Measures	
 MMS Id 	 Title 	 Summary Holding 	 Num of Holdings (Active) 

Filters

-  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

Available Items Attached to Suppressed Holdings

- 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

Bibliographic Details			Physical Item Details	
Title	MMS Id	OCLC Control Number (035a)	Process Type	Barcode

▲ Filters

- Suppressed from Discovery is equal to / is in 1
- AND Process Type is equal to / is in None
- AND Lifecycle is equal to / is in Active
- AND Location Name is not equal to / is not in Acquisitions; Borrowing Resource Sharing Requests; Boundwith; Director; Holocaust Center; ILL; ILL Non-Circulating; Lending Resource Sharing Requests; Membership; Self Check; Serials Department

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

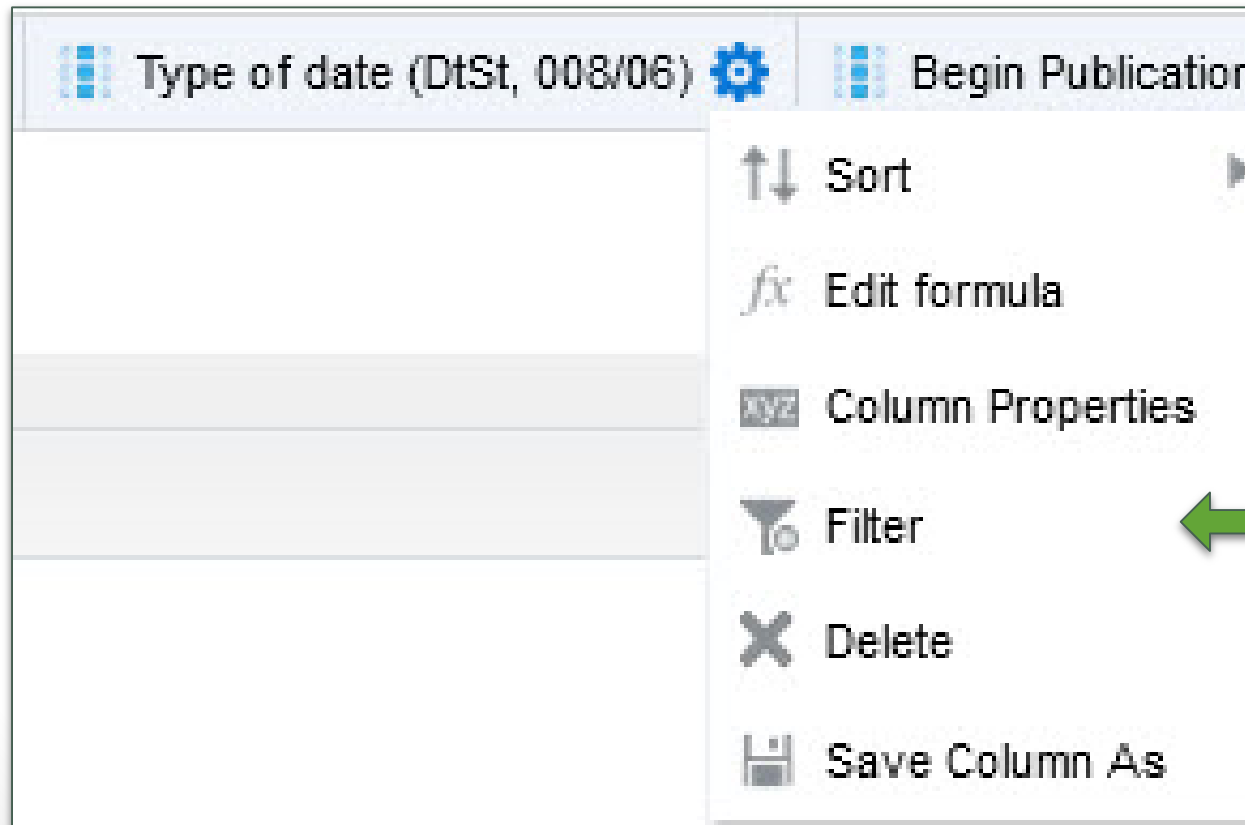
Analytics Report	Examples of Invalid Codes
008/06 (DtSt)	(pipe); blank; 0
008/07-10 (Date1)	blank; (4 pipes)
008/11-14 (Date2)	blank; 0000
008/35-37 (Lang)	blank

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

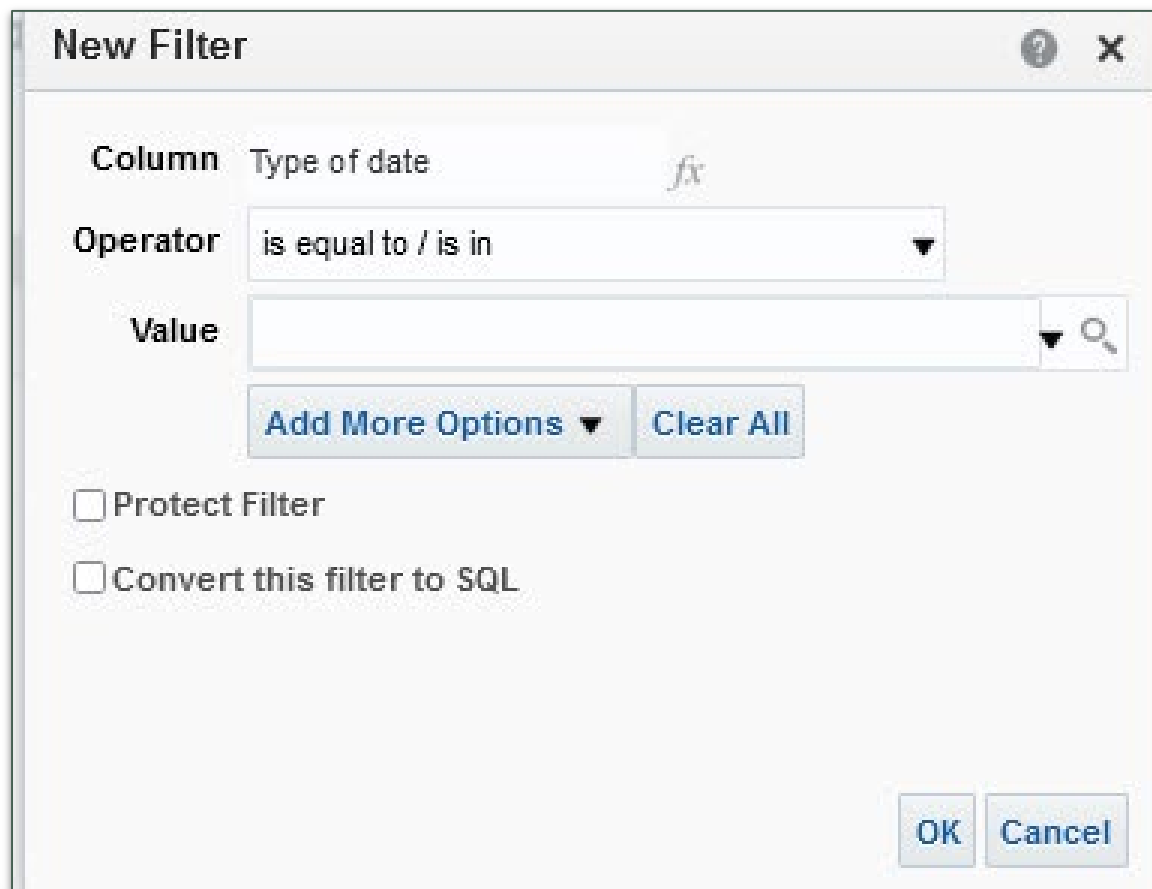
Finding Invalid Codes: Step 1

- 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:



New Filter

Column: Type of date *fx*

Operator: is equal to / is in

Value: [Empty field with magnifying glass icon]

[Add More Options](#) [Clear All](#)

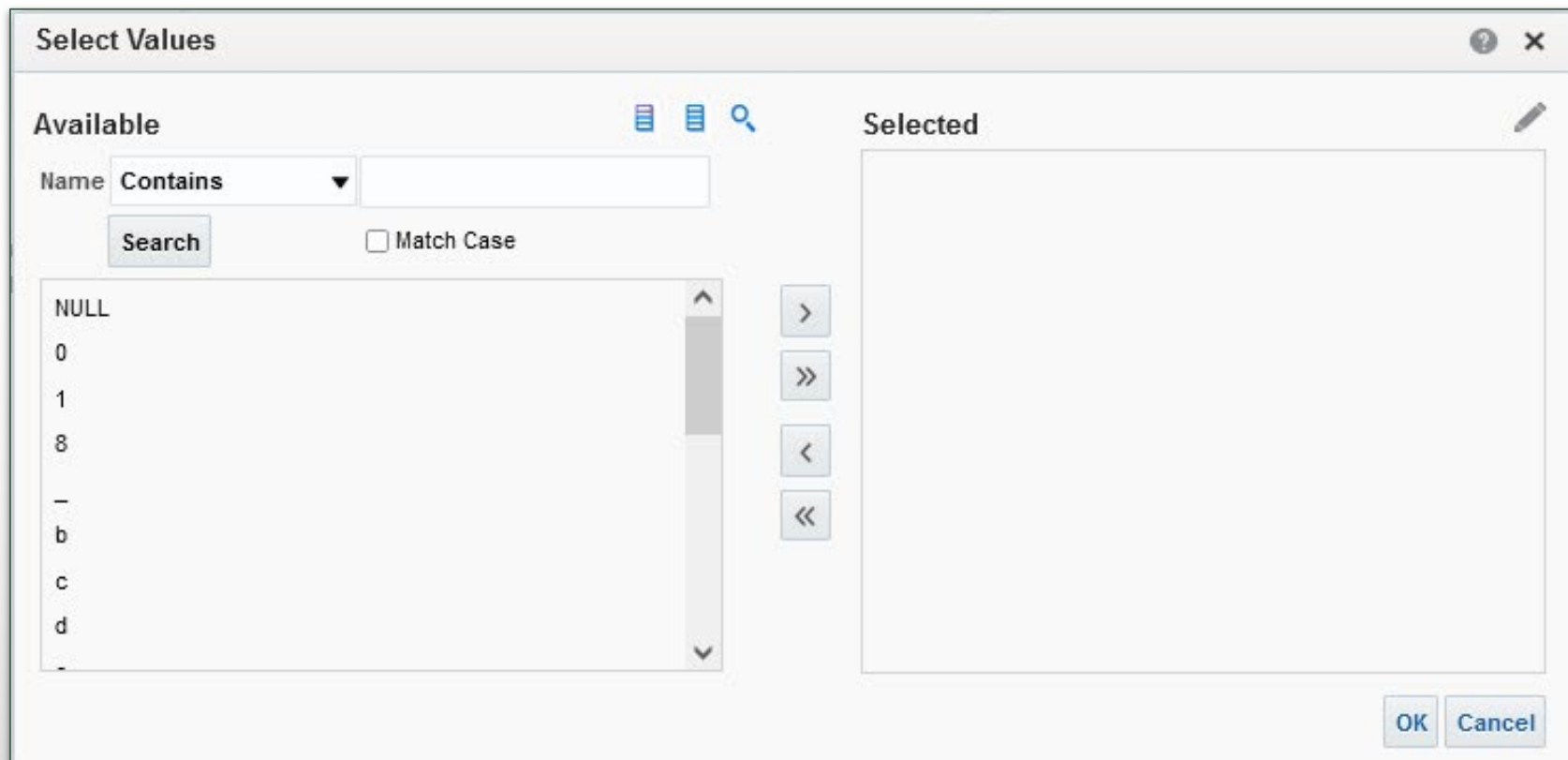
Protect Filter

Convert this filter to SQL

[OK](#) [Cancel](#)

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

MMS Id	OCLC Control Number (035a)	Title	Material Type	Resource Type	Type of date (DtSt, 008/06)	Begin Publication Date (Date1, 008/07-10)	End Publication Date (Date2, 008/11-14)
991618834602961	1043137	Atlas of South-east Asia.	Book	Book - Physical		1964	
991621174602961	1047450	Canaris; the biography of Admiral Canaris, chief of German Military Intelligence in the Second World War.	Book	Book - Physical		1974	
991622754602961	1052619	Cowboys; the real story of cowboys and cattlemen	Book	Book - Physical		1974	
991645594602961	1107468	Living poor with style.	Book	Book - Physical		1972	
991645974602961	1108651	Calm and clear.	Book	Book - Physical		1973	
992613284602961	1252175	The theology of Paul Tillich,	Book	Book - Physical		1961	

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;| ;|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

Search in: **Physical titles** ▾ Zone: **Institution** Network Community ✕

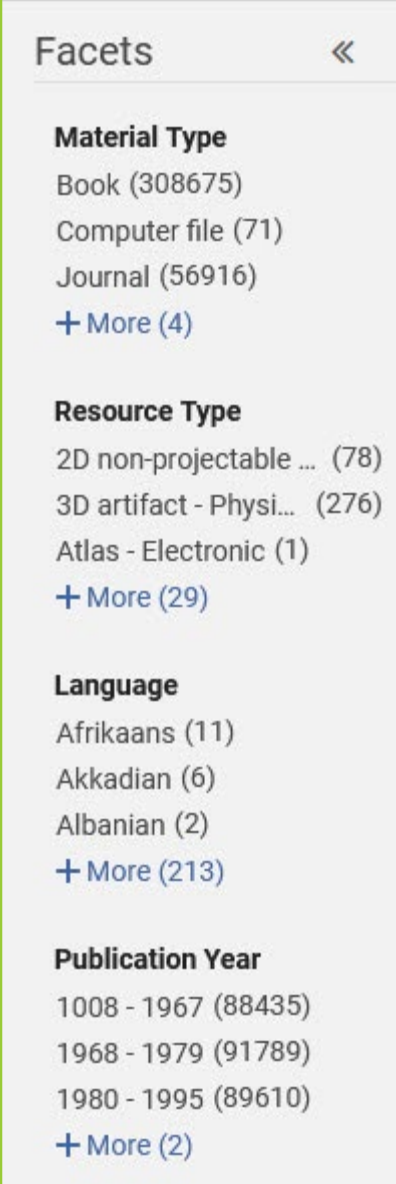
Title: MMS ID ▾ > ▾ 1 + 📄

Clear form Search

Invalid Language Code (008/35-37)

Alternate Method: Step 2

- Open the Facets sidebar:



The screenshot shows a sidebar titled "Facets" with a back arrow icon. It is organized into four sections, each with a bold heading and a list of items with counts in parentheses. Each section ends with a blue "+ More" link and a count in parentheses.

- Material Type**
 - Book (308675)
 - Computer file (71)
 - Journal (56916)
 - + More (4)
- Resource Type**
 - 2D non-projectable ... (78)
 - 3D artifact - Physi... (276)
 - Atlas - Electronic (1)
 - + More (29)
- Language**
 - Afrikaans (11)
 - Akkadian (6)
 - Albanian (2)
 - + More (213)
- Publication Year**
 - 1008 - 1967 (88435)
 - 1968 - 1979 (91789)
 - 1980 - 1995 (89610)
 - + More (2)

Invalid Language Code (008/35-37)

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 != eng)
- Action: Add an English language cataloging record per OCLC's [policy for parallel records](#)

Bibliographic Details			Location	Holding Details		Physical Item Details	
Language Of Cataloging	OCLC Control Number (035a)	Title	Location Name	Normalized Call Number	Permanent Call Number	Description	Barcode

▲ Filters

- ▼ Lifecycle is equal to / is in Active
- AND ▼ Language Of Cataloging is not equal to / is not in None; English
- AND ▼ Material Type is equal to / is in Journal
- AND ▼ 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; Reserves; 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)

Bibliographic Details				Portfolio	Electronic Collection	Portfolio URL Information
MMS Id	Title	Creator	Linked to CZ	Portfolio Linked To CZ	Electronic Collection Public Name	Portfolio URL

▲ Filters

- ▼ Lifecycle is equal to / is in In Repository
- AND ▼ Resource Type is equal to / is in Book - Physical
- AND ▼ Bibliographic Lifecycle is equal to / is in In Repository
- AND ▼ Availability is equal to / is in Available









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

Title Measures		Bibliographic Details	
 Num of Physical Items (Active) 	 Num of Portfolios (Active) 	 Title (Filing) 	 MMS Id 

▲ Filters

- ▼ Num of Portfolios (Active) is greater than 0
- AND ▼ Num of Physical Items (Active) is greater than 0
- AND ▼ Lifecycle is equal to / is in In Repository
- AND ▼ 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

The screenshot shows a 'Physical Item Details' header with five tabs: Barcode, Description, Chron I, Enum A, and Physical Item Id. Below this is a 'Filters' section containing a filter rule:

- Life cycle is equal to / is in Active
- AND Description begins with ;#;); ; .
- OR Enum A begins with
- OR Chron I begins with

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?