

## Best Practices for Running Cataloging Reports

Each CCLINC library should run monthly and annual reports to help maintain the integrity of the catalog, as well as to provide you with easily accessible data for reports, such as IPEDS, program reviews and SACS re-certifications. List Bibliography reports must be scheduled to run overnight to avoid tying up the server, which is used by all CCLINC schools. If you need help setting up reports, the Sirsi Dynix administrator in the System Office (currently John Wood) can help you set up reports or templates that can be re-used. The help e-mail is: [sirsi\\_help@nccommunitycolleges.edu](mailto:sirsi_help@nccommunitycolleges.edu).

The following reports should be run at least once per year (although you may decide to run them more frequently):

### **Accessions Reports**

You may choose to list items by call number, home location, and/or item type. You may choose to run this report monthly or each semester, in addition to each year. If you use the Acquisitions Module, you should also run Books on Order to resolve any books that were ordered and either not received or not cataloged. According to the North Carolina Community College System's Records Retention & Disposal Schedule, records of items accessioned are to be maintained permanently, so this report is important to run and keep.

**Best Practice: Use the List Items report\*, limiting to your school and the date created for the month or year. You can choose the item information to include on your report on the Print Item page by choosing List in the Entry List and adding individual MARC fields. Since this is an important report to keep, you may wish to choose All Copy Information on the Print Item Page.**

### **Circulation Reports**

Although circulation reports are not strictly catalog maintenance reports, ascertaining which items in a particular collection or call number range have low circulation can be helpful for weeding purposes.

**Best Practice: Use the List Items report\*, limiting to your school. On the Item Selection page, you can limit the date created to eliminate items that have been in the collection a short time, and you can choose a Date Last Charged and Number of Total Charges to provide information about each item's circulation history.**

### **Deletion Reports**

It is important to note the difference between Deleteme and Discard. Deleteme should be used for any items you need statistics on and that need to be removed from OCLC by the System Office. Discard is for non-permanent items such as instructors' copies of reserves or for items you do not need to remove from OCLC, such as equipment. Items in the home location of Deleteme are removed from OCLC and purged from the system each July by the System Office. Again, the Retention & Disposal Schedule requires that libraries keep a list of deleted items on file. Items in Discard are purged at least once per year, but may be purged more often, so

unless you are sure you won't need to keep a record of an item, use Deleteme instead of Discard.

**Best Practice: Run the List Items report\* at the end of June, limiting to your school and the home location of Deleteme. You can sort Deleteme reports by call number or item type to give you information helpful in collection development. You can choose the item information to include on your report on the Print Item page by choosing List in the Entry List and adding individual MARC fields. Since this is an important report to keep, you may wish to choose All Copy Information on the Print Item Page.**

### **Ownership Reports**

IPEDS requires a count of print titles and physical AV titles, so at the very least you will need to run reports for IPEDS purposes. Take note that "titles" are different from "items." For example, a multi-volume set would be one title, but many items. The same would be true of a title with more than one copy (one title, but more than one item).

**Best Practice: For IPEDS purposes, run one Count Item Titles report at the end of June, limiting to your school and all of the item types that contain books at your library (BOOK, NEW-BOOK, REFERENCE, etc.). (You must use Count Item Titles, not Count Titles, in order to limit to one school.) Run a second Count Item Titles report, limiting to your school and all of your media item types. Although not needed for IPEDS, you will probably want to run a Count Items report (or Count Item Titles, depending upon your wishes) counting your total collection, excluding the home location of Deleteme and/or Discard, so you will know your collection size. You may also wish to run a List Titles or List Items report or several reports by home location, item type and call number to provide information helpful for collection development.**

### **Miscellaneous Reports**

**Average Date of Publication** is a great report to use for program review and SACS re-accreditations.

**Best Practice: Use the Average Date of Publication, limiting to your library and excluding the home location of Deleteme and/or Discard. You can also run this report for specific call number ranges to help you develop a plan for where to focus future acquisitions, or run the report for other schools for comparison purposes. You may wish to limit the publication year to after 1900 or 1950, or another date of your choosing, so that any very old or rare books that are anomalies, but need to be kept, will not lower the average of the balance of your collection.**

**Items with the Incorrect Class** will show you items that have a class of AUTO, because there was no call number in the record imported, or another incorrect class was clicked on by mistake during cataloging.

**Best Practice: Use the List Bibliography report, limiting to your library. In Call Number Selection, choose AUTO under Class Scheme. Another way to do this is to choose "Excludes selected policies" under Class Scheme, and exclude LC or Dewey, depending upon your library's classification system. For example, if your library uses LC, exclude LC, and you will get a list of any call numbers that are not LC.**

**Call Numbers without Copies or In Process** is self-explanatory and occurs most often if you use the Acquisitions Module or if you temporarily place items in the location of Inprocess during cataloging.

**Best Practice: Use the List Bibliography report\*, limit to your library under Item Selection and limit to Inprocess for the home location. Sorting this report by date will give you information about your processing time for items.**

### **Collection Item Lists by Call Number Ranges**

These reports are useful to have available for faculty.

**Best Practice: Use the List Call Number Records Report, limiting to your school and the desired call number range.**

### **Shelf List Reports**

Running shelf list reports for various call number ranges helps with shelf reading, catalog clean-up and collection development.

**Best Practice: Use the List Call Number Records Report, limiting to your school and the desired call number range.**

### **Lost and Missing Items.**

It is a good idea to run a report of Missing items and Lost items (Lost-Paid and Lost Items with No Bills) at least once a year, so these items can be moved to Deleteme. See the documents “Best Practices for Dealing with Lost Items” and “Best Practices for Dealing with Missing Items” for detailed instructions on working with these types of items.

\*List Items only allows you to select at the item level, so if you need to select at the call number or title level, you will need to use List Bibliography instead.