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## Database Maintenance from the Central Catalog to Your Local System

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**OhioLINK**  
**Membership  
Summit 2022**





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# Membership Summit 2022

## Database Maintenance

from the Central Catalog to your local system

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*Erin Kilkenny, Cataloging & Metadata Librarian, OhioLINK*



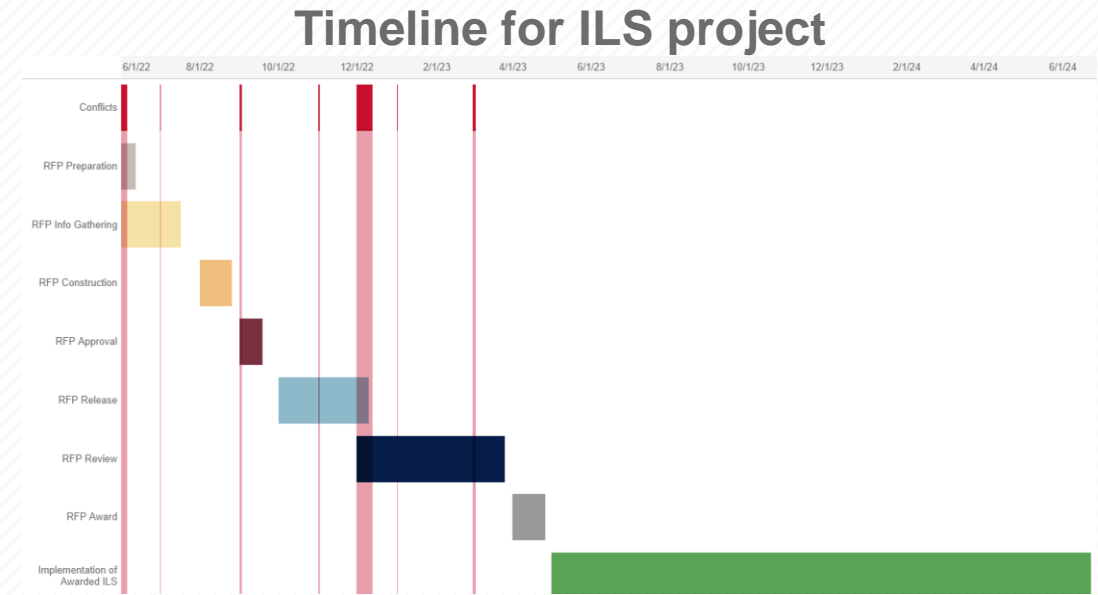
# Agenda

- Part I : Central Catalog
  - *Erin Kilkenny, Cataloging & Metadata Librarian, OhioLINK*
- Part II : Local Catalogs
  - *Leigh Duncan, Head of Library Technology Services, Wright State University*



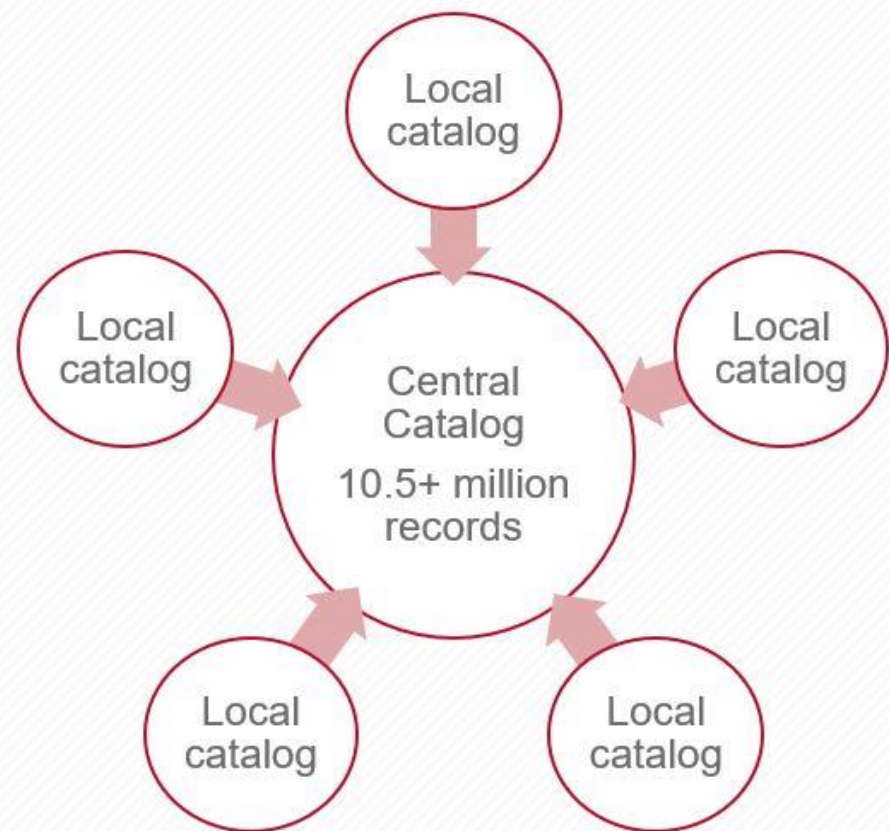
# Why database maintenance?

- Database maintenance affects resource access and ease of use
- OhioLINK's upcoming ILS RFP



# Central Catalog cleanup project

- Small cleanup project started September 2021
- Corrected 310,000 records, about 3% of records in the Central Catalog



# Central cleanup projects

- Focused on errors that might cause the most problems for users & low hanging fruit
- Cleanup projects so far:
  - Records with OCLC prefixes
  - Records with dead rave links
  - Local access only eresource records
  - Rec stat d in leader field
  - Institutions contributing OhioLINK provided records
  - Records with non-OCLC numbers



# Reporting and correcting Central Catalog errors

- Errors list roster – make sure your institution's contact is current and accurate!
- Report errors you find in the Central Catalog
- Instructions on Ostaff for correcting errors in the Central Catalog





# Ostaff page : getting started with database maintenance

[www.ohiolink.edu/forms/getting\\_started\\_database\\_maintenance](http://www.ohiolink.edu/forms/getting_started_database_maintenance)

If you need an Ostaff account, email [support@ohiolink.edu](mailto:support@ohiolink.edu)

## Database maintenance project ideas

- Search your local database for historical [suppression codes](#) no longer in use and update them to the current ones. These historical codes cause display errors.
- Check MARC records for code "d" in the leader field (05 - Record status) where records are not suppressed from display. More information about this field is available at the [Library of Congress site](#).
- Ensure MARC records do not include an [OCLC prefix](#) in the 001 and remove any found. OCLC prefixes cause duplicate records in the Central Catalog that would otherwise match.
- Search for [historical rave links](#) no longer in use and delete them from any records.
- Familiarize yourself with [minimal bibliographic record standards](#) for records contributed to the Central Catalog. Search your local database for records without mandatory fields, such as title, and upgrade the records to fix them.



# Call Before You Start Big Projects!

- Large scale cleanup projects of more than 50,000 bibliographic records can overload the system!
- Contact [support@ohiolink.edu](mailto:support@ohiolink.edu) first





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# Thank you

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# About Wright State

- Wright State University
  - 40 library staff
  - 10,000 FTE students
  - Dayton, Ohio
  
- Our Sierra System
  - Implemented in 1992
  - Shared by Wright State, 5 Dayton-area hospital libraries, Kettering College, and our branch campus in Celina, Ohio



# Preparing for Migration

- Perform data cleanup by looking at record content in our bibliographic and attached records—ensure the data is correct and consistent
- Maintain system codes by removing unused codes and documenting how codes are used



# Benefits of System Maintenance

1. Reviewing and assessing key system codes will make it easier to map them to a new system (patron types, item types, locations)
2. Evaluating templates and reusable data that tie into our daily workflows and will give you an idea of what you need to document and perhaps recreate in a new system
3. Critically assessing the overall system setup can help you make the new system as intuitive and manageable as possible for library staff *as possible for library staff*



# System Codes

- Location Codes
- Patron Types
- Item Types
- other Fixed Fields

They may have different names, but similar identifiers will be used in all integrated library systems



# Location Codes

1. Function = Statistics
2. Fixed-Field Item report
3. Report = Location

Compare this report to your full list of locations (Admin > Parameters > General > Branches). Any locations that display in your Branches table but not in your statistical report are not currently being used in item records. Note those location codes.

4. Note any location codes that are used in 10 or fewer item records





# Location Codes

1. Next, run Fixed-Field reports for bibliographic and all other attached records. Look for the location codes you noted that are not in use, or little used.
2. Consult your colleagues—can these codes be deleted? If little-used, can the items be moved to other locations?



# Location Codes

1. When you have your final list of codes to delete, consult the Sierra manual for “Deleting Location Codes”
2. Location (Branch) codes are in various places in Sierra including Scopes, Locations Served, Hold Pickup Locations, Days Closed/Hours Open, Loan Rule Determiner, Link Maintenance, System Options, and Record Templates.
3. Delete codes from all other places first, then the Branches table last.



# Patron & Item Types

Use a similar method for Patron Types and Item Types

1. Function = Statistics
2. Cross-Tab patron report (ptype x home library)
3. Or a cross-tab item report (itype x location)
4. Look for unused or little-used codes
5. Consult with colleagues to determine which codes can be deleted



# Patron & Item Types

6. Update your mapping with OhioLINK
7. Read “Maintaining System Parameters Tables” in the Sierra manual
8. Delete the codes from all other tables before deleting them from the Patron or Item Types tables:

Patron Blocks, Loan Rule Determiner, System Options, Record Templates, catalog WWWOptions, and more



# Templates and Reusable Data

These may not map one-to-one in a new ILS, but there will most likely be something similar.

Streamlining and documenting these now will make your migration easier.



# Templates and Reusable Data

Look at Record Templates, Saved Searches, Saved Exports, Saved Queries, Substitution Phrases and other reusable data

1. Make a list of those saved in Sierra
2. Send them to Library staff with instructions on where to view them in Sierra
3. Delete any that are no longer used



# Loan Rules (local)

*Carefully* review the “Loan Rules Table” documentation in the Sierra manual before making any changes to your loan rules.



# Loan Rules (local)

1. Open the Loan Ruler Determiner table and sort by the Loan Rule column
2. Note any loan rules numbers that aren't in use (e.g. if you see entries for loan rules 1, 2, and 4 then you know loan rule #3 is not currently being used)
3. Use Create Lists to run an item record list to see if any of the unused loan rules are in the Loan Rule field of any item records





# Loan Rules (local)

Devise a system to note which loan rules are in use and which can be overwritten:

- If a loan rule is not in use anywhere in Sierra, I change the name to OK TO REUSE, which means I can overwrite this rule if we need to add a new one.
- If the loan rule is still be held in overdue items, I change the name to DO NOT DELETE, which means the loan rule isn't current but I can't yet overwrite it.



# Loan Rules (local)

Document your loan policies and any special circumstances related to your rules.

Review your Notice Texts—you may be able to delete some that are no longer used



# Documentation

Consider using SharePoint or something similar to track your progress and store your documentation

## Annual Sierra System Maintenance ☆

Work item ↑ ▾	Description ▾	2021 Progress ▾	2022 Progress ▾
Branch Locations	Review table; delete unused	Completed	In progress
Create Lists	Review saved searches, saved lists, saved exports; delete unused	Completed	Not started
Items Types	Review table; delete unused; update with OhioLINK	Completed	Completed



# Results

	2018	2022	% reduction
Item Types	79	55	30%
Patron Types	30	24	20%
Locations	243	151	38%
Loan Rules	110	27	75%
Record Templates	135	80	41%
Saved Searches/Exports	97	48	51%
Load Profiles	46	31	33%



# Conclusion

These are just a few examples of methods you can use to review codes and data within your Sierra system.

Take the time now to familiarize yourself with how they are used. There may be entire fields you can do without and don't need to recreate in a new system.





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# Thank you

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