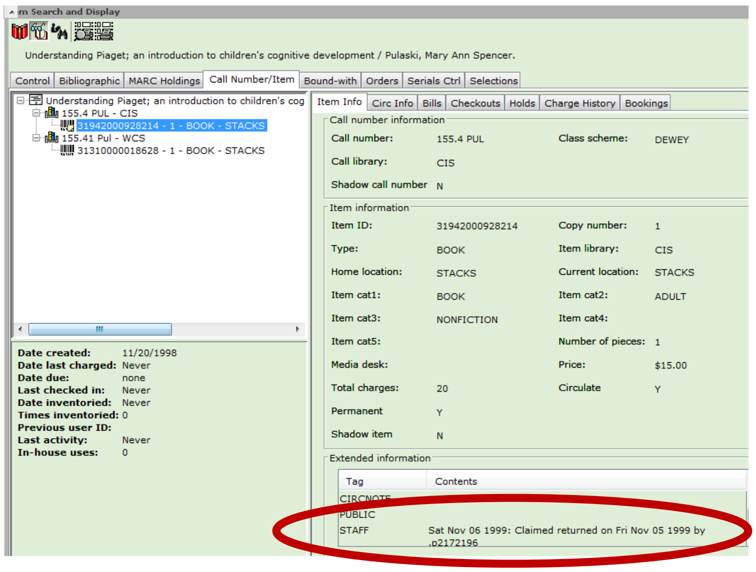
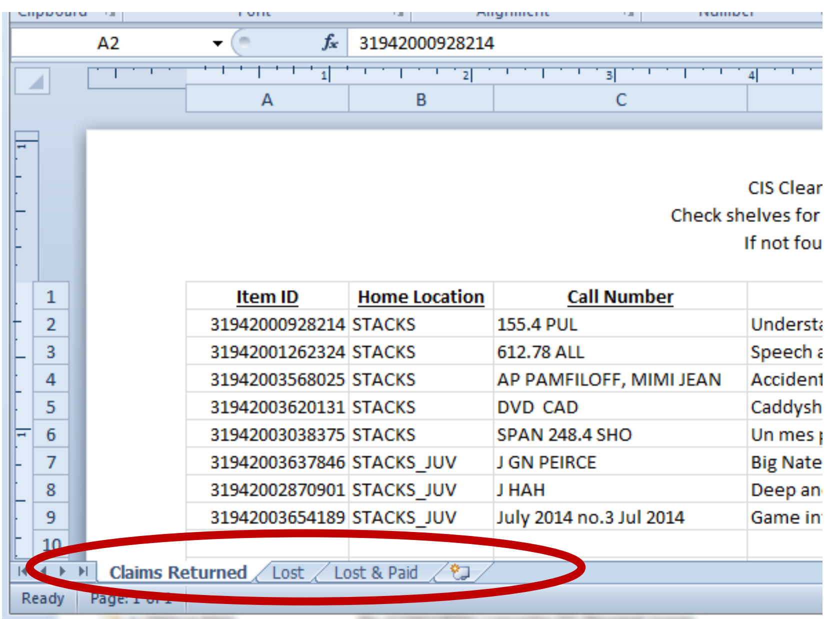
SWAN Migrated Items Cleanup Report

What is this?

We have run a report of items that had a status of Claims Returned, Lost, or Lost & Paid in Millennium. Due to the fact that Symphony does not have an equivalent field many of these items were migrated with a Current location matching the Home location. The note in the Millennium record that explained the status was then created in a staff note located in the Extended information section of the WorkFlows item record:



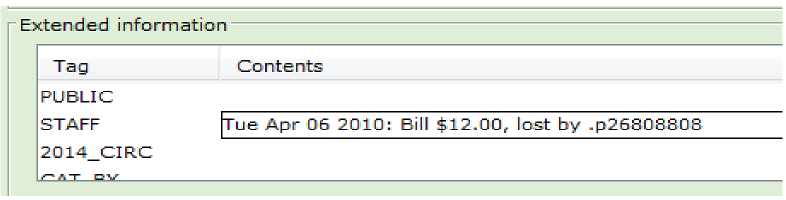
In order to clean up the database, SWAN will send an Excel Workbook to each library. The majority of libraries will receive a workbook with 3 worksheets (1 worksheet for each item status):



How do I process this report?

First, check your shelves for each of the items listed. You can either print the reports or open the worksheet on a tablet or laptop and take it with you in the aisles.

If you find an item on the shelf, please delete the staff note from the item as it is no longer accurate. To do this, go to the Cataloging Module in Symphony and open the Edit item wizard Edit Item located in the Call Numbers and Items wizard group. **Scan the item ID** then scroll down in the Extended Information section of the item record until you see the Staff note. Click on the information in the staff note field then delete the information from the field.



If you do not find items from your report on the shelves:

Look for the item in WorkFlows. If it is currently checked out to a patron, delete the staff note from the item record as described above.

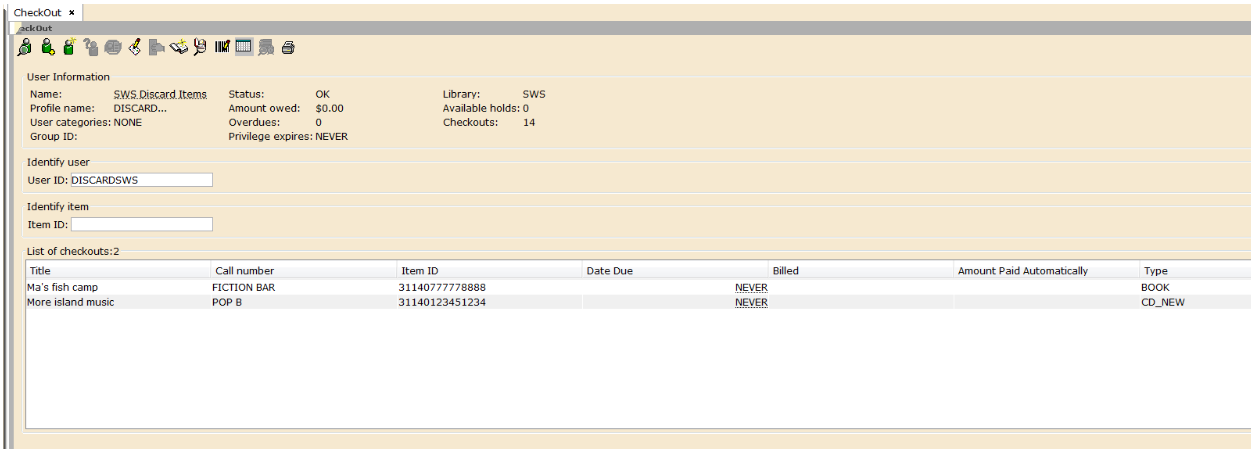
For items listed on the **Lost** tab – you can stop here. Once everyone has finished processing their reports we will follow up on these items.

For Items listed on **the Claims Returned** and **Lost & Paid** tabs:

Check them out to your library Discard User. Each library has a Discard User identified by their three letter library code suffix.

Examples: DISCARD*ADS*, DISCARD*BIS*, DISCARD*SWS*

1. Open the Checkout Wizard CheckOut located in the Common Tasks group of wizards.
2. Enter your Discard User ID and then check out items to be deleted. Type the **Item ID** and hit Enter or click the **Checkout Item To User** button at the bottom. Items will appear in List of checkouts.



3. When finished, close the wizard. These items will now be shadowed in Enterprise and will appear only on the staff side with a Current Location of DISCARD-Can't Circ.

These items will then be deleted when the weekly Discard report is run.

We would like to have this cleanup completed by the end of this year, thank you for your assistance in this project.