

### Overview

This document outlines tasks that Circulation Plus/Catalog Plus users can complete to prepare their data for a Destiny implementation. When your school or district is converting to Destiny, your data from Circulation Plus/Catalog Plus will be extracted and loaded into Destiny. Please refer to the document “Converting to Destiny” for detailed information on using the Circulation Plus/Catalog Plus Conversion Utility to extract and load your data into Destiny.

The main goal in getting prepared to move your data to Destiny is to get the database as clean, and as complete, as possible for conversion into Destiny.

The key steps are to 1) weed your collection, 2) make sure your collection data is as complete and clean as possible, 3) make sure your patron data is as complete and clean as possible, and 4) clean up various codes and setup information (circulation types, patron types, categories).

***None of these cleanup tasks are mandatory for moving to Destiny.***

But, by spending time now on making sure the database is clean, you will help to ensure a more successful Destiny implementation for your staff and for your teachers and patrons.

Each area is covered in more detail in the sections below.

### Weed Your Collection

The bulk of the data contained in your Circulation Plus/Catalog Plus database centers on the MARC records for your collection. Take the time now to ensure that your database contains only MARC records for materials you currently have and want to continue to circulate in Destiny. There are all sorts of guidelines for weeding a collection. In Florida, SUNLINK posts weeding guidelines and even has a Weed-of-the-Month communication (see <http://www.sunlink.ucf.edu/weed/>). In general, you will want to remove out-of-date titles from the collection. Some areas of the collection are more time-sensitive than others.

You can also run the following reports in the Reports module to identify items that may be good candidates for weeding:

- Circulation Statistics - Run the report to identify items that never circulate. Do you need to keep these items? Use the report limiters to identify copies that have "0" circulations.
- Collection Age By Call Number - Note the areas that are very old, you can also see how often the area circulates. If you identify areas that look very

old (when running the report by 100's or 10's), run the report again by 1's and focus in on that area (use the Starting Number and Ending Number to focus on a Dewey range).

It may be best to just "print to file" for these reports (if they are long, you won't need to waste paper).

Besides getting rid of the physical items, you'll want to make sure you remove the items from your database. There are a few easy ways to remove titles/copies in Circulation Plus/Catalog Plus. You can delete copies by scanning them directly in the Cataloging module, or by capturing the barcodes in the PHD and then later processing them in Cataloging. You can also delete titles and copies individually in Cataloging.

If you don't have time to do a weeding project, make sure you focus more on the next area.

## **Complete and Clean Collection Data**

### **Remove Missing Copies**

If you (or your predecessors) have ever taken inventory of your library, you may have items that have been missing for years from your collection. It may be time to remove these items from your database. You can run a report in the Reports module to identify if you have any items with a "Missing" status. Run a Copy List by Status report and select the "Missing" status.

You can run a Global Delete Missing Copies (Edit | Global Delete | Missing Copies) from the Cataloging module. In this function you can select to delete items that were marked as missing in a specific year (or a range of years).

If you haven't completed an inventory in a long time, it may be a good idea to do one. You may be surprised to find your physical collection and the database are out of sync - due to losses of materials. If you do an inventory now, consider deleting any missing materials.

### **Remove Lost Copies**

What about Lost items? The Copy List by Status report lets you identify items that have been lost for a long time. Be sure to select a status of "Lost". If you don't think the items are coming back, consider deleting these items from your database.

### **Remove Titles without Copies**

It's possible that you have titles in your database that have no copies. You can run a report of these titles (Titles without Copies) in the Reports module, and then delete the titles in the Cataloging module (Edit | Global Delete | Titles without Copies).

### **Fix Titles Without Standard Numbers**

The process of merging MARC records from various individual school databases into shared Destiny MARC records is based in a large part on standard numbers (LCCN, ISBN, ISSN). You will want to make sure that your records have standard numbers. Run a Titles Without Standard Numbers report. If you have a large number of titles on this report, consider spending some time editing records to add the appropriate standard number(s). Newer materials have ISBN barcodes right on the back of the book - these barcodes can be scanned with your barcode scanner to make entry of the numbers easier and more accurate.

### **Fix Titles With Duplicate Standard Numbers**

How about items with Duplicate Standard Numbers? Find them with the report. If you have Circulation Plus/Catalog Plus 6.0, you can use the Merge Titles feature to rollup copies from duplicate records onto the single best record and discard the other titles - in a few easy steps.

### **Run Alliance Plus Autorecon and Process Misses**

You will want to make sure that your cataloging data is as complete and clean as possible. If you have an Alliance Plus subscription, you will want to run an Alliance Plus Autorecon. When you start the process, choose the selection to "Replace brief records". This process will enhance your records to be as complete as possible. Alliance Plus processing is also based on standard numbers, so recognize the importance of adding standard numbers to your records. You can run the Autorecon for sections (defined by starting call number) at a time.

Once an Autorecon has completed, you will know how many records "hit" (or matched to Alliance Plus and were enhanced) and how many records were "misses" (records that did not have enough information to match to Alliance Plus). "Misses" can be result of missing standard numbers or errors in the title and author headings of the existing record. You can run a Process Misses in Alliance Plus to identify the "misses" and manually find records on Alliance Plus that can be used to enhance them.

## Complete and Clean Patron Data

### Remove Older Patron Records

If you haven't cleaned up your patron data in some time, now is the time to do it. Unless you need to retain inactive patrons for some reason, your database should really only contain patron records for active students and staff of your school. Keep in mind that students that left your school, and moved onto to other schools in the district, will likely be already entered in the database of the school they are currently attending.

In the Reports module, you can run a Patron Name List to identify older patron records. This report can be run and reviewed for all patrons, or can be limited to patrons of specific status (such as Inactive or Restricted), or patron type (Faculty or Student), and/or graduation year. You can even group patrons in the report by Homeroom or other Location/User-Field values.

The Patron Maintenance module has functions to delete patron records with your PHD (Edit | Delete Patrons via PHD) or in groups (Edit | Global Delete). In either function you can choose to retain patrons with outstanding transactions.

### Remove pseudo-patrons

Some customers checkout lost materials to various pseudo-patrons, or have setup pseudo-patrons for other purposes (such as checkouts to other schools or organizations). If you have any of these types of patron records in your system, you can remove them from your database. Destiny has new improved functions for tracking lost materials, and supports checkout of materials to patrons from other schools.

## Cleanup Setup Information

### Remove Unneeded Circulation Types and Categories

Review your current circulation types and categories in the System Setup module (choose Setup | Cataloging).

If you notice circulation types that you don't feel are required, you can run a Copy List by Circulation Type (in the Reports module) to identify the copies with that circulation type. Once you have updated the circulation type for these copies, you can delete the unneeded circulation type in System Setup.

If you notice categories that you don't feel are required, you can simply click Delete on the Categories tab in System Setup. The category will automatically be removed from the copies and the category will be removed from the database.

## **Remove Unneeded Patron Types**

Review your current patron types in the System Setup module (choose Setup | Patron Maintenance).

If you notice patron types that you don't feel are required, you can run a Patron Name List (in the Reports module) to identify the patrons with that patron type. Once you have updated the patron type for these patrons, you can delete the unneeded patron type in System Setup.