Reconciliation Process

What is the updated summary of the reconciliation process?

As a brief overview, the Prospector annual reconciliation process consists of the following steps:

1. Each library compiles a list of their local items checked out to Prospector patrons, with a due date within the previous calendar year. Using the INN-Reach report, Institutional Overdues, report parameters:

   **Minimum Days:** (the current day of the year) - example: September 12\textsuperscript{th} is “255”.

   **Maximum Days:** (Minimum + 365) - example: September 12\textsuperscript{th} would be “620”. Or, the Maximum can be set to the default 9999 if you still wanted to include items with due dates older than last year.

2. Location: Libraries who run their own ILS server, this would be “ALL”, for libraries that are part of a consortium this parameter would set to limit the report to only your locations. Alternately, use Create Lists to find items with “@” status and a due date within the date range of 01/01/13 and 12/31/13, or those with SQL access may compile a similar list of overdue items. Search local collection for these long overdue items. Any found items should be checked in to clear the INN-Reach patron.

3. After the completion of the local search, spreadsheets listing the remaining Institutional Overdue items are sent to (dbritt@ald.lib.co.us), or the current Chair of the Document Delivery committee. The Excel file should include the following columns for each entry: owning library, item location, call number, title, barcode, borrowing patron’s home library, and virtual patron record number. Copying the table from the INN-reach report to Excel by using CTRL-C and paste can be tricky, as it needs to be done twice, toggling the Call#/Barcode column to get the data from both versions of the one column.

4. All individual spreadsheets will be combined into one spreadsheet, and this master list is sent to all Prospector libraries.

5. Each library searches their local collection for items that may have been mis-shelved rather than sent to the owning library. Items that are located during this search are checked in, sent back to the owning library, and reported to the listserv so other libraries aren’t looking for the same items.

6. After all library searches are complete, local libraries can clean up long overdue items.
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