

Review File Creation and Maintenance

Purpose: We will maintain a “master” review file for each collection while it is under review. These review files will be the source for data contained in the bibliographic or item records that is not captured by the survey forms.

A. Create file from a Preservation Patron Account.

1. Use the random sample list to pull books or items from the stacks for review. Ideally, students will pull only 40 or 50 at a time in order to avoid keeping large number of items out of circulation. See [Collecting and Managing Samples from Collections](#).
2. Students will check out the items to a Preservation Patron Account established for the Assessment Project and notify Christine. The account for is named PRESERVATION-Assessment (barcode is assess1).
3. Creating review file - General Procedure:
 - a. After the first batch of items have been checked out, we will create a review file containing all items newly checked out to the account.
 - b. After each additional batch is pulled and checked out, we will use the append function in Millennium to add the new batch to the review file.
 - c. Items that were not in the stacks and are to be included anyway, will be appended to this review file using barcodes.

B. Detailed Instructions:

1. Open Millennium Cataloging. Go to Create Lists
2. Find an empty list. Use the smallest list that you can. Preservation has lists 88-93. You can also use lists 125-130 (Technical Services). You can use one labeled “open list” as well. To find information about list assignments go to <http://ucblibraries.colorado.edu/systems/chinook/reviewFileAssignments.htm>
3. Highlight your list and click on Search Records. Name your list, for example, SCI temp. Record type should be ITEM. Click the box on the left that says Range and change it to Review. Highlight the review file and scroll down until you find the preservation accounts (Presv Patron accts). The label will look something like: Presv Patron accts-6/23/06-cad (60) (Patron Records). (The easiest way to do this is to click on review and hit tab, then the

down arrow, then page down about 9 times for preservation lists.)

4. In the row labeled Term 1, insert data by double clicking on the box that you want, highlighting your selection, and clicking on OK. Set it up to read:
5. Type-PATRON field-P BARCODE Condition-equal to Value A-assess1
6. You will have to type in data for Value A and it will change depending on the account that the books have been checked out to. E. g. "wds", assessart, assessmph
7. Click on Search.
8. Your file now consists of all the items checked out to that patron. You will need to add these to the master file. Highlight the master file, e.g. SCI Master List-4-6-06 cad (Probably in numbers 88-93.) Click on Append. The Review File Name should be the master list. Record type should be ITEM and change Range to Review. For the review file, scroll down until you find your file, SCI temp. Click on Search and search even though there are no review criteria.
9. With the master file still highlighted, click on Dedupe to get rid of duplicate records. It is a good idea to take note of how many records are in your lists at various times in order to determine how many you added that were not duplicates.
10. You now need to insert the note into the records that do not already have it. Highlight your file, SCI temp, and click on Sort Records. Sort by Type-ITEM and Field-NOTE (x). When it is done sorting, open the file and double click on the first one. Check if it has the note. (Assess Proj SCI cad presv 4/06, for example.) This is also a good time to copy the note that you will be inserting, CTRL+C. Check records at the beginning of the list until you find the first one with the note. Do the same at the end of the list, until you find the last one with the note. Remove all records that already have the note from this list. To do this, highlight the first one that had the note, press shift and scroll down. When you have highlighted all the ones that had the note, click on "Remove". You will be left with only the records that still need the note. Click on Close.
11. From the main page, click on Rapid Update. **DON'T MESS THIS UP!** Change type to ITEM. The box on the left should say REVIEW, and scroll down until your file (SCI temp) is the Review File. Next to Field chose NOTE (x) and type or paste your note into the box labeled value. **DOUBLE CHECK EVERYTHING** and click Start. Close when finished.

12. Finally, empty your file-- Highlight your file (SCI temp) and click Empty.