Discard/weed: Marking Items for Deaccessioning

Staff with cataloging or circulation permissions can place items to be removed from the collection in discard/weed status. Marking items discard/weed makes the item non-circulating, non-holdable, and invisible in the public facing OPAC. Depending on local workflow for item deletion, after items are marked discard/weed, staff can place them in item buckets to share with cataloging staff for deletion or catalogers can rely on regular reports to identify items in discard/weed status. Since items can be placed in discard/weed from several menus, cataloging staff that use buckets from circulation staff for deletion should also run reports to identify other items in the status. Cataloging staff can delete as needed from discard/weed.

With this functionality, there is no need for circulation staff to mark deaccessioned items missing or damaged during the weeding process. Those statuses can be reserved for actual lost and damaged items.

Permissions

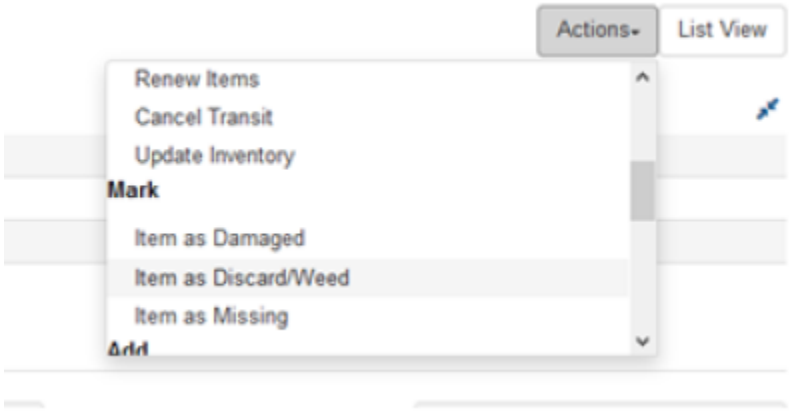
Marking an item discard/weed is controlled by the MARK_ITEM_DISCARD permission. Most staff accounts are set to mark only those items in their library system as discard/weed. Marking an item outside the login’s system results in an override request.

The permission COPY_DELETE_WARNING.override is also needed so that the process can proceed for some statuses.

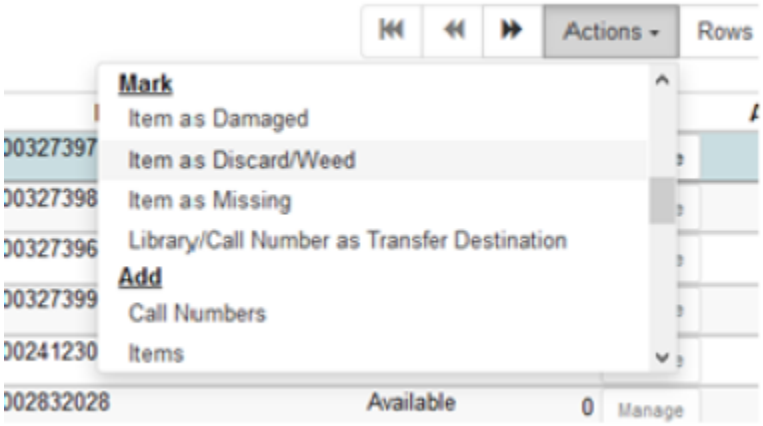
Locations of Mark Discard/Weed

The discard/weeding marking option presently occurs from menus on both the list and detail views of:

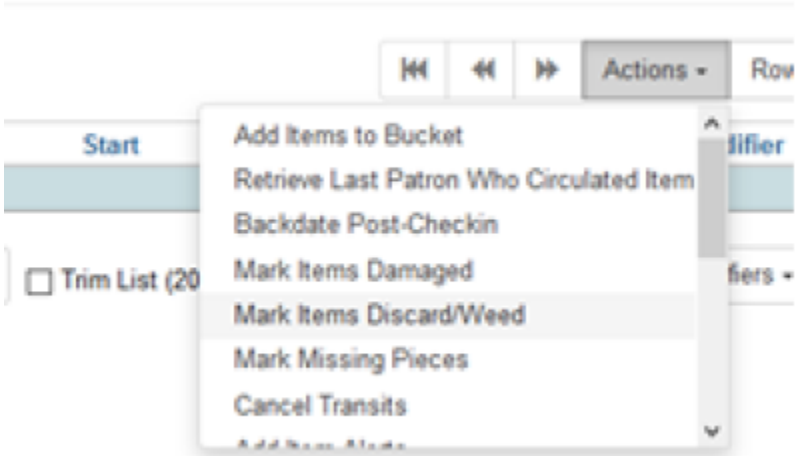
- Item Status:



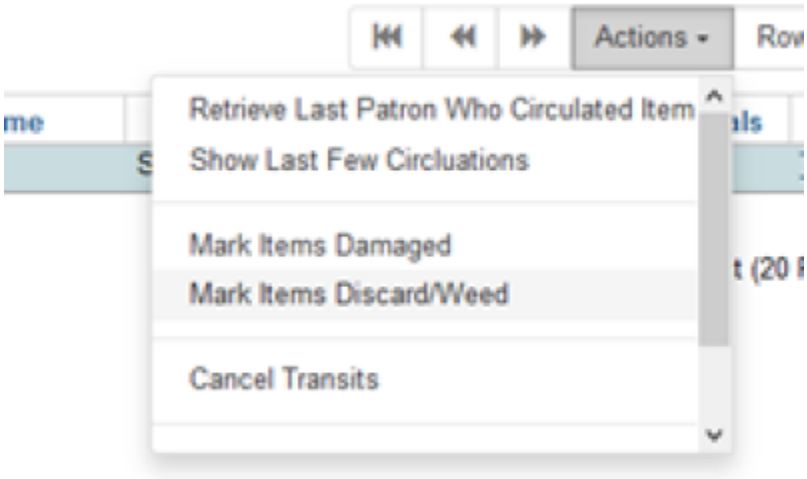
- Holdings View:



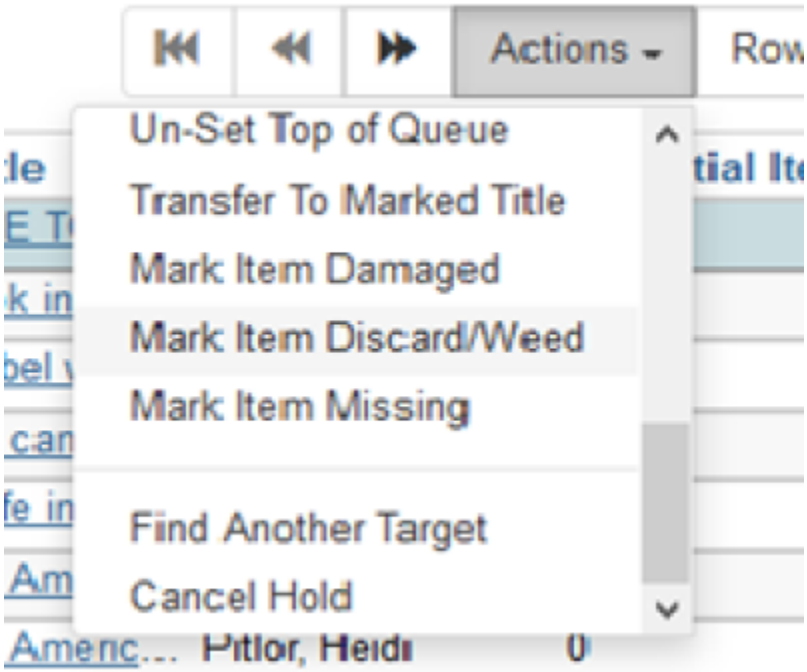
- Checkin:



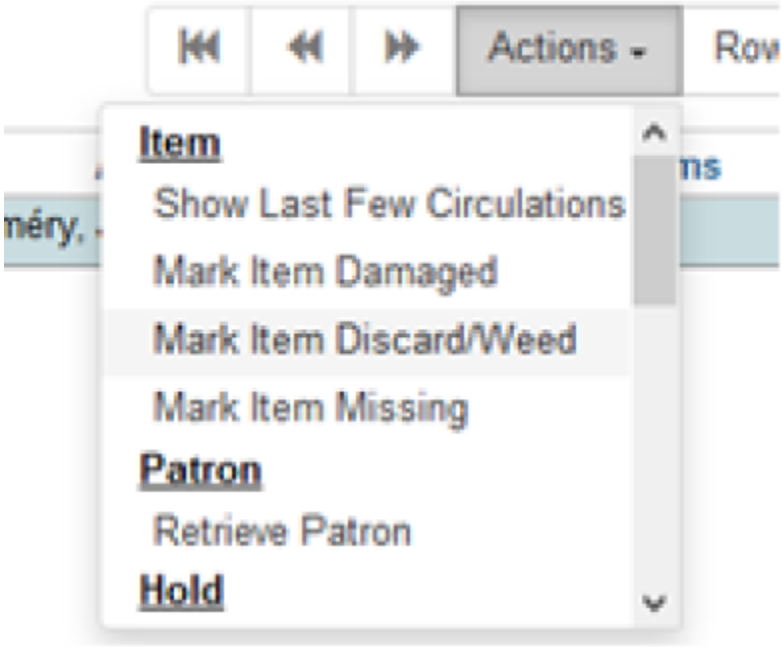
- Renew items:



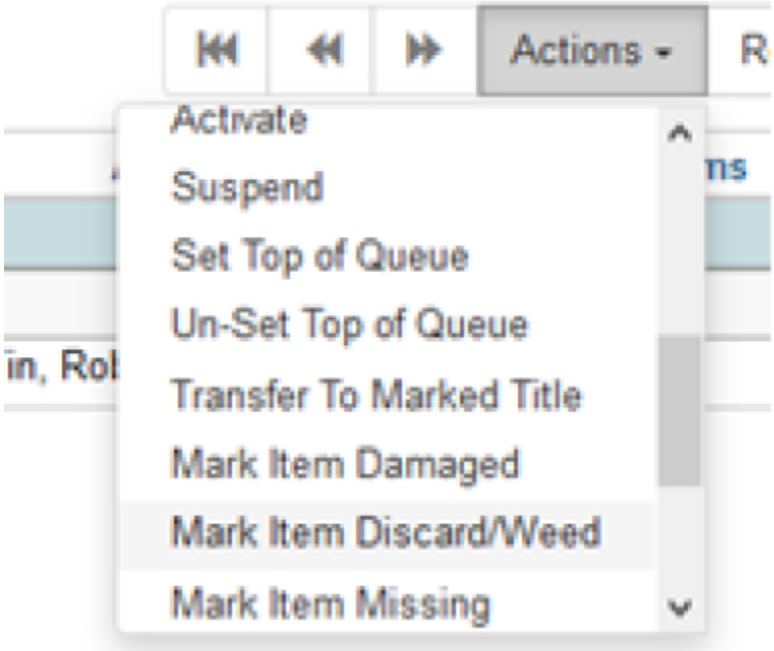
- Patrons hold list:



- Pull List for Holds Requests:



- Holds shelf:



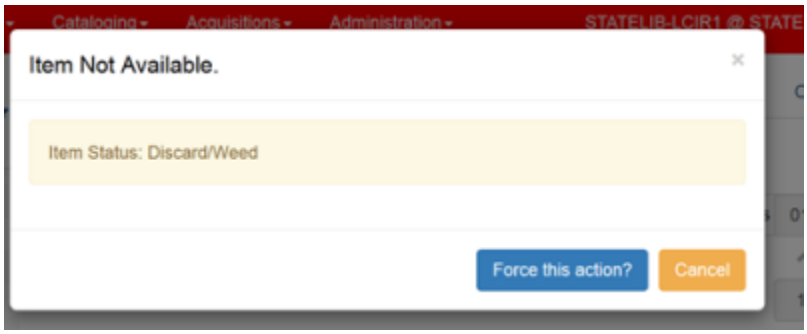
Marking items

Items in available, bindery, cancelled transit, cataloging, damaged, ILL, in process, missing, on reservation shelf (not implemented by PINES), reserves (not implemented by PINES), reshelving, and

temporarily unavailable can be marked discard/weed with no further staff action than a click-through confirmation dialog box. Staff can also cancel marking items at this point. Other statuses are automatically processed when marking discard/weed, closing open circulations and managing holds, for example. Best practice, however, is to resolve most of these statuses before marking discard/weed.

Item already checked out to patron

If item to be marked discard/weed is still checked out to patron, staff receive a warning/override message that allows them to cancel or proceed marking item discard/weed. If staff elects to continue marking item, the item is checked in as normal by the ILS, triggering any normal check-in related functions, including billings. Best practice is to resolve checked out items before marking discard/weed.

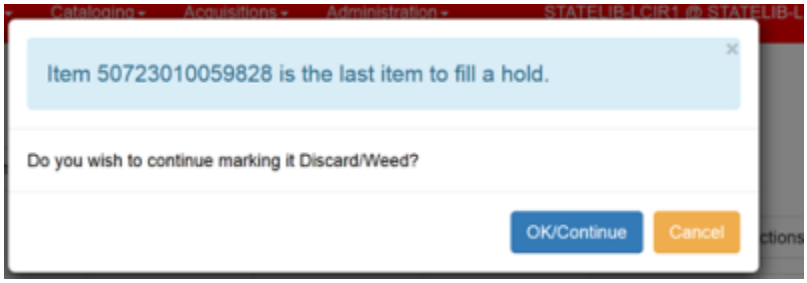


Pending Holds

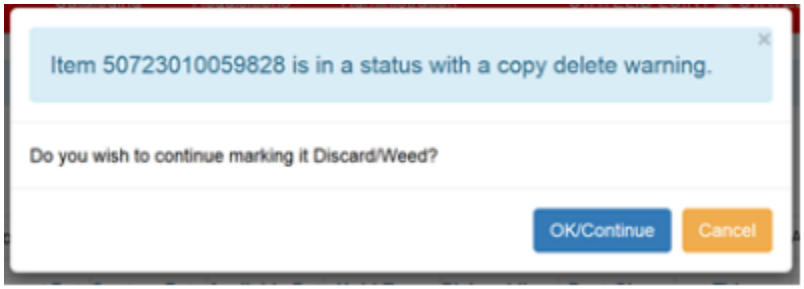
For items in hold statuses Ready for Pickup, Waiting for item, waiting for capture, or on holds shelf, can be marked discard/weed, the item is removed from the holds queue and the hold is retargeted. Items on another library's hold shelf, ready for pickup at that library will need a permissions override. Action should be cancelled and marking discard/weed aborted until the item is back in the owning library.

While best practice is to resolve the status of items before marking discard/weed, it is not always desirable to remove a hold before marking an item discard/weed since staff may have to manually place another hold on the same title. This action might have negative consequences for the place of the patron hold in the queue. If there are other items that can fill the hold on the same bibliographic record, in the process of marking it discard/weed, the item will be automatically removed from the queue and the hold retargeted.

If item to be marked discard/weed has pending holds that cannot be filled by other items attached to the same bibliographic record, the system will prompt staff with a warning/override that allows them to cancel or proceed marking item discard/weed. If staff elects to continue the process, the item is marked discard/weed by the ILS, cancelling the hold status and removing the item from the holds queue. Best practice is for staff to determine if there is another copy on the record to accept the hold. If not and the item needs to be marked discard/weed, either the hold should be transferred to another title or the patron informed that the hold cannot be filled.



Most hold statuses will require an additional click through requiring a copy delete warning override:



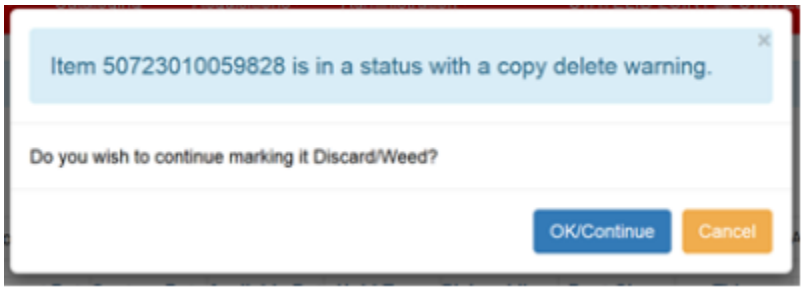
At this point, staff can proceed or cancel marking the item, to investigate the hold.

Items in transit

If item to be marked discard/weed is in transit, staff receive a warning/override message that allows them to cancel or proceed marking item discard/weed. If staff elects to continue marking item, the transit is aborted by the ILS, triggering any related functions. Best practice is to resolve in transit items before marking discard/weed.

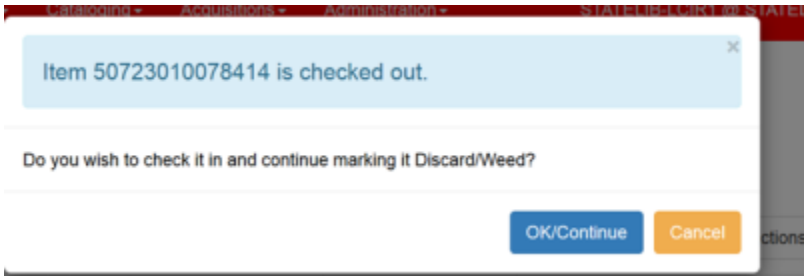
Item in Lost, long overdue, or on order

If an item to be marked discard/weed is in a lost, long overdue, or on order status, staff receive a warning message that allows the process to be cancelled so that the status can be resolved. Items in lost, long overdue, or on order statuses should not be marked discard/weed directly from those statuses. The action should be cancelled and the status resolved before placing the item in discard/weed.



Checking out discard/weed items

If an attempt to check out an item marked as discard/weed occurs, the system will prompt staff with a warning to force the check out. Staff can cancel or proceed with checkout. If staff continues with check out, the item checks out as expected and will not be placed back in discard/weed status on return.



Checking in discard/weed items

Checking in discard/weed items will place them in reshelving status and remove the discard/weed status with no warning.

Batch processing

Items can be marked discard/weed in batch in item status (F5). Staff can check all, or a subset of, the list and from the actions menu, mark them as discard/weed. Any item in those statuses potentially not suitable for discard/weed will trigger a error message that staff can either OK/Continue or Cancel. Best practice is to resolve statuses marking the item discard/weed.

Deletion of items in discard/weed

Items can be deleted directly from discard/weed status by staff with appropriate permissions to delete items without further action. Catalogers should follow local practice for determining if OCLC holdings should be deleted. See {deleting holdings in OCLC} for more information.

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