Step by Step – Cleaning up Missing and Trace Items

For Lost Books, see the instructions titled "Step by Step Billing"

1. Ask to have Your Lost and Claimed Returned to Missing setting changed to 1 or 2 years
Our default setting for items to age from Lost or Claimed Returned to Missing was 10 years. We recommend that you have it changed to 1 or 2 years to create a better workflow for cleaning up the catalog. You can decide how long you want it based on how long you would want to actively pursue recovering lost items.

Once the setting is changed, items that have been in the Lost or Claimed Returned status for the selected time will change to Missing status. The patron record will still have a block for the amount, and will still contain the title that was lost, but the item record will no longer contain the patron information, making it possible to withdraw it easily.

CEFLS can do this for your library, but we wanted you to know when we do it so you won't be surprised.

2. Decide how often you will withdraw the missing and trace items. For example, if you like to run reports monthly, you could add this to your monthly schedule. If it works better for you to do this twice a year, and you can remember to do it, that would work also.
3. Decide how long you will let items remain in Missing or Trace status before you withdraw them. We recommend no more than six months to a year. If items return after they have been withdrawn, it's usually not too difficult to add them back in Horizon.
4. Use Item Group Editor to find the Missing and Trace items that have not had a status change for the past year. First enter your Location:
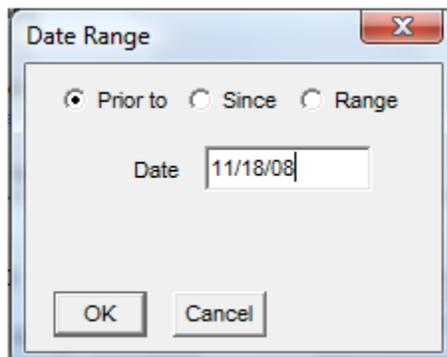
5. Click the circle next to AND, then choose Item Status in the top section.

6. Type M for Missing or Trace for Trace. Click on AND again. Choose Status Updated in the upper window.
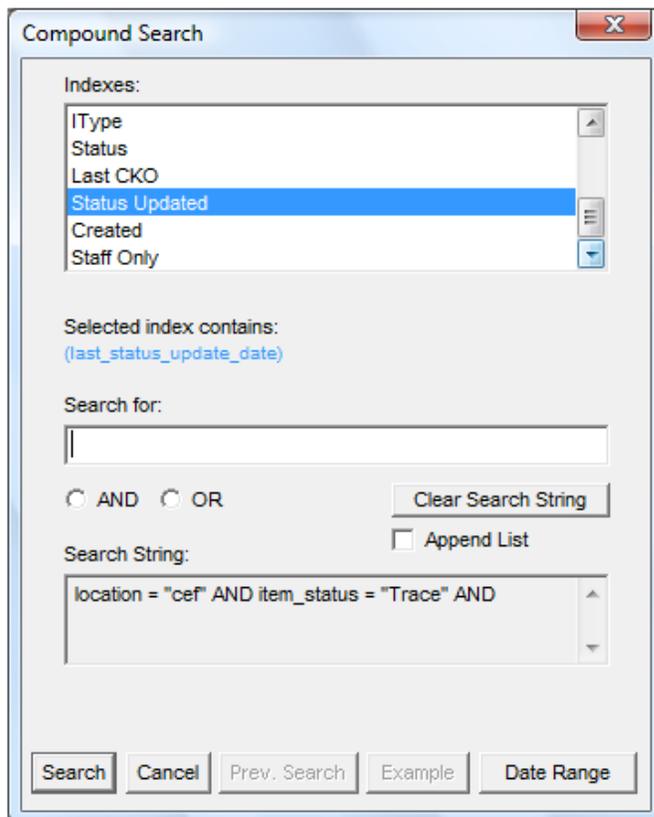
7.

8. Click on the Date Range Button. Use the Prior To option and enter a date either 6 months or 1 year ago today, and click OK:

9.

10. and finally click on the Search button at the bottom.

11. A list of the items at your location appears. Now you can select all of these with CTRL-A and Edit the status to 'w' for withdrawn. If you prefer to sort and print the list to look for the items first, you can also do that. After doing the Trace items, repeat for Missing.

This method can be done at any time and is very flexible. However – Be Careful to ONLY WITHDRAW YOUR OWN ITEMS, always put in your location as the first step, always check your status to make sure it's Trace or Missing, and check the date carefully to see that it is prior to 6 months to a year ago.

If you make a mistake, call CEFLS immediately because the withdrawn items do stay in the catalog for a little while.