

THINGS TO CHECK BY CSM CATALOGERS	PAM	CRAIG	STEVE	CHRISTINE	CHRIS	LISA	ANITA
	Monographs	Monographs	Serials	GP Records / Special Formats	Map Records	GP Records	GP Records
CATALOGING CLIENT:							
Searching in Cataloging Client and OPAC:							
Verify call number indexing		X			X	X	
Verify search functionalities (search by index selection, builder, keyword)							
Retrieve record by bib, MFHD, item, authority, barcode							
Verify session defaults and options			X				
Cataloging Record:							
Ability to import records to module	X			X		X	
Ability to change 006					X		
Ability to change 007				X	X		
Ability to change 008 (Bib fixed field)	X	X			X		X
Ability to change MFHD fixed field	X	X					
Ability to change Leader			X			X	
Ability to overlay records			X			X	
Ability to merge records		X					
Ability to generate MFHDs			X	X		X	X
Ability to generate items			X	X			
Ability to save records (bib, MFHD, item, authority)			X	X			X
Verify export function from OCLC to Cataloging Client			X	X			
Verify export function from non-OCLC sites to Cataloging Client (i.e., Prospector, DDM2, etc.)			X			X	X
Ability to re-link MFHDs to other bibs						X	
Ability to re-link items to MFHDs						X	
Ability to use the bound-with function (existing and new)						X	
Accuracy of tag tables (any updating needs to be reported)			X				
Verify bound-with function is working						X	
Check diacritics (degree symbols, russian, etc.)	X		X	X	X	X	
Check records with large MFHDs					X		
Check order of MFHDs within An existing BIB					X		
Check order of items within a MFHD					X		
Check to see if 856 is working (client and Voyager)				X		X	
Check copy no. and sheet no. within items					X		
Check existing items types							

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Library Catalog and Prospector Checking:							
Check record display in Library Catalog and Prospector	X			X		X	X
Confirm record additions in Library Catalog and Prospector	X			X		X	X
Confirm deletions in Library Catalog and Prospector	X			X		X	
Check records from MARCIVE loads in Library Catalog and Prospector (except for shipping list loads)						X	X
Check newly attached MFHDs and Items in Library Catalog and Propsector				X		X	
Check suppression in Library Catalog and Prospector						X	X
Confirm merging in Library Catalog and Prospector							
ACQUISITIONS/SERIALS CLIENT:							
Serials Check-in:							
Verify issue receipt in Serials History and in Library Catalog.			X				X
Verify link between Check-in and Cataloging module, both to bib. rec. and holdings.			X				
Verify accuracy of Component name			X				
Verify accuracy of predictive component expected dates			X				
Verify ability of system to generate items when prompted in Maintanace mode of check-in record and check proper defaults for item type and location.			X				
Acquisitions:							
Verify ability of system to generate new P.O.'s.			X				
Verify correct generation of line items and in detailed line items, the accuracy of funds allocation and copy status.			X				
Verify accuracy of searching for P.O.'s.			X				
Verify accuracy of options and session defaults.			X				
Verify accuracy of New Vendor and Search for Vendor file.			X				
Verify accuracy of invoice file.			X				
WEBADMIN:							
Ability to perform bulk load	X					X	
Ability to get reports from WebAdmin						X	
SYSADMIN:							
Verify existing bulk import rules (loaders)	X					X	

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Verify existing duplicate detection profiles	X						
Verify existing cataloging profiles	X						

<u>THINGS TO CHECK at the CIRCULATION DESK: (for each patron group)</u>						
PATRON GROUPS:	Faculty/Staff	Grad Student	Undergrad Student	Reciprocal Borrower	Member	Department
Charge						
Discharge						
Fines – added/cleared correctly						
Holds – entered/expired/picked up, correctly						
Recalls - entered/expired/picked up, correctly						
Lost books – auto. applied, \$100 fine applied						
Addresses/Email						
On The Fly Records						
Media Scheduler						
NOTICES – running correctly, addresses/emails						
<u>THINGS TO CHECK at the RESERVE DESK: (for each patron group)</u>						
PATRON GROUPS:	Faculty/Staff	Grad Student	Undergrad Student	Reciprocal Borrower	Member	Department
Charge						
Discharge						
Add records						
Edit record						
View records by number, title, and instructor						
Fines – added and removed correctly						
On The Fly Records						
<u>MISCELANEOUS THINGS TO CHECK</u>						
Call Slip						
Web Admin. Related to Call Slip/ Prospector						
<u>PATRON LOADS:</u>						
Name - First, Middle, Last						
Exp. Date is Correct						
Email is there and email Exp. Is correct						
No Invaild Data in the Notes Field						
<u>CATALYST:</u>						
Searches						
Patron Placed Holds						
Patron Renewals						
ILL Requests - Verify with ILL						