

UARK Documentation: Review Files / Create List Policies

(University Libraries, University of Arkansas)

1. Create List / Review Files

a. Naming Conventions

List owners and dates can be identified by the system. However, using your initials or name as the start of the file name makes it easier to sort lists to find your own.

b. Use the smallest number of "Maximum Records" to hold your list.

c. Files should be deleted as soon as they are not needed, and **disowned if they were owned** by an individual.

d. Maintenance Schedule

Each month on or near to the 15th, an email will be sent to those whose lists are older than two months, asking them to empty and lists that are no longer in use.

2. Saved Searches, Sorts, Lists and Exports

a. Naming conventions

Unlike review files, owners and creation dates of saved searches, sorts, lists, and exports are not identifiable on the system. For that reason, ALL saved searches, sorts, lists, and exports should include initials or an identifiable name.

b. Maintenance Schedule

Each quarter (in January, April, July, and October), an email will be sent asking users to delete any unused saved searches, sorts, lists, and exports.

3. Output Files

Output files are those files created by library staff that use the Data Exchange (FTP) function to send records out of the system.

a. Naming conventions

The system records the last modified date but not the file owner. Because these files are sent to vendors there are no required naming conventions.

b. Maintenance Schedule

Files older than one year will be deleted each quarter (in January, April, July, and October), unless additional files are needed in which case the oldest files will be deleted by date of modification until enough space has been gained.

4. Upload files

Those responsible for record loads through Data Exchange (and you know who you are) are also responsible for keeping these files in good order and for cleaning out unneeded files.

5. System-generated Review Files

System-generated review files are created when:

- staff perform certain functions, such as:
 - batch printing of labels
 - ERM coverage loads
 - batch overlay record
 - URL checker errors
- the system runs some automatic lists of records in certain statuses, such as:
 - items on search
 - items with holds
 - overdue items
 - items on holdshelf
 - bibs and items not in the SCAT table

These files can only be viewed when using the COPY function in create list. They appear after the last staff create list, #141.

Those using these files have the option to empty the original file after copying it.

These system-generated files should be reviewed on a quarterly basis (in January, April, July, and October), for any in need of deletion.

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