
Contents

Webinar Recording	1
Webinar Summary	1
Overview and Purpose	1
Cataloging Basics	1
Circulation Life Cycle	2
Overdue Items	2
Automated Lost Processes	2
After the Item Moves Through Lost Report.....	2
Manual Processes	3
System User Accounts	3
Monthly Automated Cleanup Processes.....	3
Weeding and Cleanup Reports	4
Resources.....	4
Questions?.....	4

Webinar Recording

- Recorded on April 30, 2026
- [Watch the Video](#)
- [ASPeN Event](#)

Webinar Summary

Overview and Purpose

The webinar explains the full life cycle of an item in the Montana Shared Catalog (MSC), with a strong focus on the circulation life cycle, where most questions arise.

It also covers automated processes, manual processes, and new cleanup procedures implemented in the past year.

Cataloging Basics

- Staff add new items via the Call Number and Item Maintenance Wizard or, if not available, use SmartPort to import records from OCLC.
- Resources, including updated cataloging guides, are available in the MSC Knowledge Base.

Circulation Life Cycle

- Ideal flow: checkout → on-time return → reshelving.
- Typical flow: checkout → overdue notices → return.

Overdue Items

- Item becomes overdue at midnight of the due date.
- Notices are sent via email or print; SMS is considered courtesy-only and limited.
- Fines accrue (if the library charges them).
- Overdue reports and calling lists can be accessed/created in BLUEcloud Analytics (BCA).

Automated Lost Processes

There are two main automated stages when overdue items are not returned:

1. Assumed Lost Report (runs Tuesdays at 30, 60, or 90 days overdue)
 - Status changes to Assumed Lost.
 - Temporary bill and optional processing fee applied.
 - Patron may become blocked/barred depending on settings.
 - If the item is returned: system removes bills and resets status automatically (unless the patron was barred—staff must unbar manually).
2. Lost Report (runs on the 5th of the month at 90, 120, or 180 days overdue)
 - Breaks the link between item and user.
 - A permanent lost bill and lost item note are added to the patron account.
 - Item status changes to Lost, Discard, or Replace; circulation type becomes Lost Item.
 - Items cannot be checked out again until staff manually update the item record.

After the Item Moves Through Lost Report

- If unpaid and unreturned: item remains in Lost; staff must eventually decide to discard or replace.
- If user pays after the Lost Report: staff must remove the lost item note; system moves item to Lost Paid that night.
- If the item is returned after the Lost Report: staff must waive bills, remove notes, reset home location and circ type.

Manual Processes

Mark Item Lost (Manual Lost Process)

- Used when patrons report an item lost before it enters automated processes.
- Status becomes Lost Claim.
- Very similar to Assumed Lost process but initiated by staff.

Damaged Items

- System does not support automated damage processes.
- Recommendation: treat irreparably damaged items using the manual Lost procedure.
- If damage is minor and item can circulate: charge patron for damage and reshelve.

Claims Returned

- Optional process for when patrons insist they returned an item.
- Item remains checked out but stops generating notices/fines.
- If not found within 180 days, it goes through a Claims Returned version of the Lost Report.
- Afterward, staff must update home location, circ type, and optionally adjust the claims counter.

Missing Items

- If staff cannot find an item on the shelf (e.g., during holds or patron request): use Mark Item Missing.
- Item is checked out to the library's missing account.
- If still missing after repeated searches, staff should discard or replace.

Lost Paid Items

- Items in Lost Paid should be reviewed by staff for replacement or discard.
- Items left in Lost Paid for 3 years will be automatically moved to discard by the system..

System User Accounts

- Used for internal workflows (repair, cataloging, storage, storytime, etc.).
- Items checked out to system users don't accrue fines and are excluded from circulation stats.
- If you have system-user-like accounts not configured properly, MSC can update them on request.

Monthly Automated Cleanup Processes

- Items in Missing, Claims Returned, Lost, or Lost Paid for 3 years are automatically moved to Discard and then deleted the following month.

MSC Quarterly: Item Life Cycle

April 30, 2026



- New process: items checked out to system users (other than Missing) for 3 years are moved to Missing, then after 3 more years moved to Discard and removed.

Weeding and Cleanup Reports

BLUEcloud Analytics contains new, reorganized cleanup and weeding reports for:

- Lost
- Lost Paid
- Claims Returned
- Missing
- Discard candidates

These assist with collection maintenance and decision making.

Resources

- Updated Knowledge Base articles and flowcharts.
- Reports and tools available in BCA.
- Support is available via MSC ticketing.

Questions?

[MSC's Knowledge Base](#)

[Submit a Library Services Support Request](#)