Tools and Strategies for Circulation Profiling

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Abstract

Presentation for new users to help them profile their integrated library system. Topics include general preparation ideas, creating codes for material locations, organizing the tables, and visualizing the loan rules.

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Tools and Strategies for Circulation Profiling

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Presentation Outline

- Introduction
- General preparation ideas
- Creating location/branch codes
- Organizing Innopac tables
- Visualizing loan rules

Introduction

- **Who am I**
  - **WCU is a member of WNCLN; a three member consortium in North Carolina**
- **What is Circulation Profiling?**
  - **Initial setup**
  - **Good profiling vs bad profiling can last the lifetime on your ILS**
  - **Ongoing changes, maintenance, and housekeeping**

How to get started

- **Step back and look at circulation policy patterns**
  - **Start with the most common areas and patron types**
    - Create “defaults”
    - Consider combining policies, notices
    - Examples:
  - **Then move to exceptions**

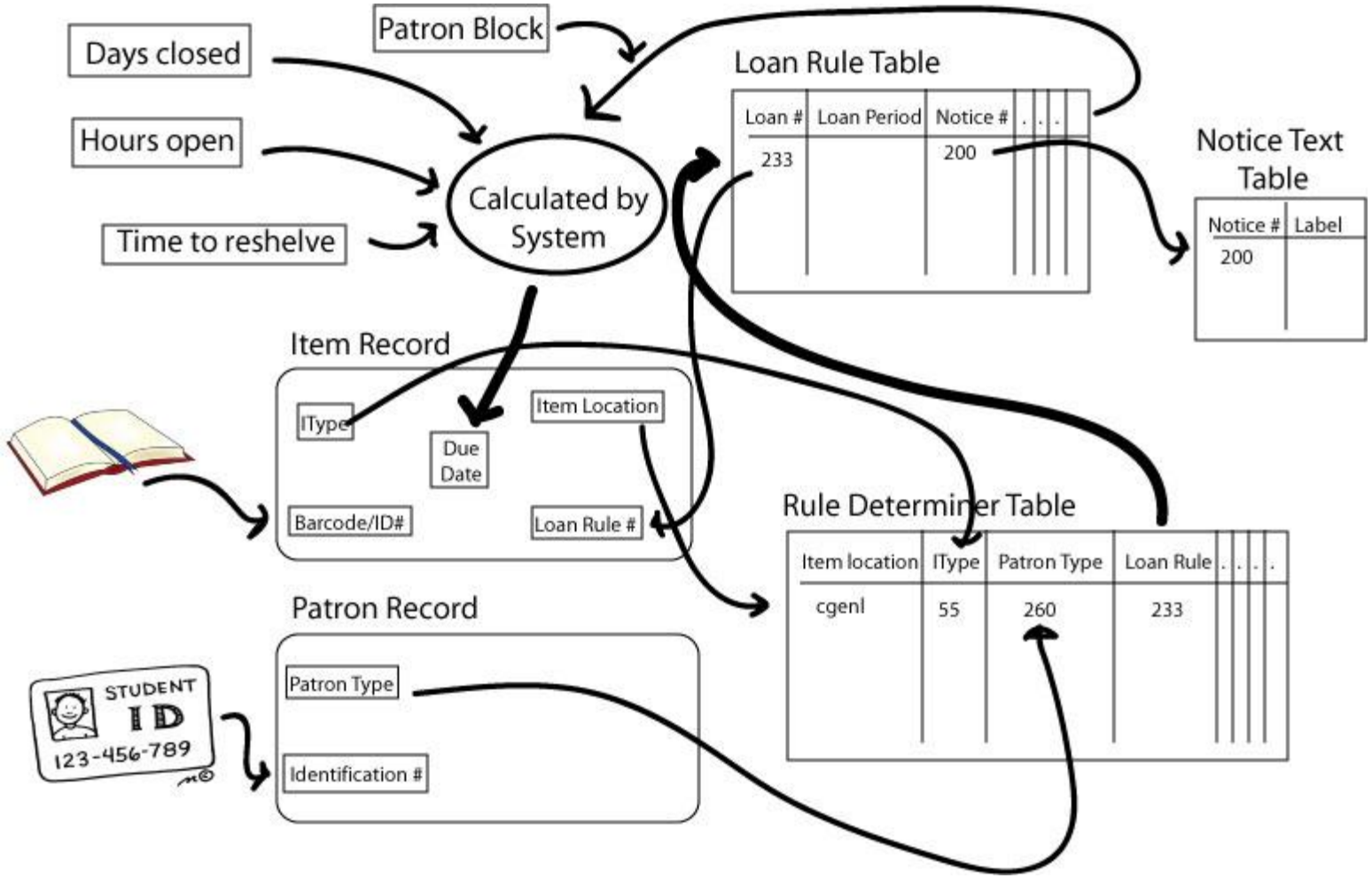
Preparation for profiling

- **Review all locations from your old system**
  - **Are there any item in it?**
  - **Do we still need it or can we combine it with another location, or discard completely?**
  - **Are there locations with multiple item types that circulate differently?**
- **Review patron types the same way**

Consider changing policy

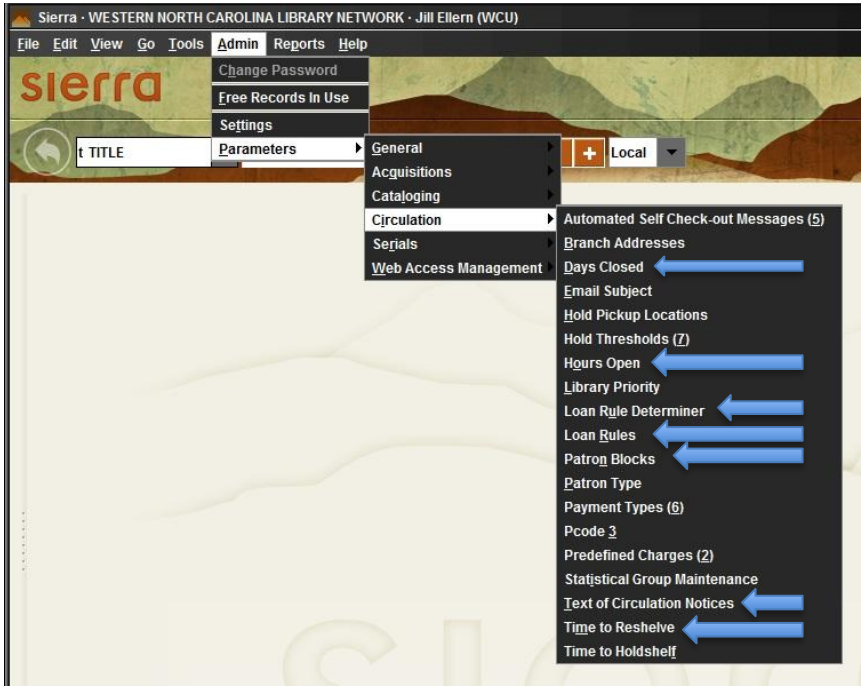
- **NOW is the best time to update circulation policies**
  - **There are some policies that can't be done with Innopac**
  - **There might be some policies you don't want to do with Innopac**
- **Blame automation/computer system**
  - **people understand this**
  - **you might not be able to change it again until you change systems**

Reviewing the process



Tables needed for Circulation Profiling

- Days closed
- Hours open
- Loan Rules
- Loan Rule Determiner
- Patron BLOCKS
- Text of circulation NOTICES
- TIME to reshelve



Review the loan rule elements (all 56 of them)

- The manual is your good friend
  - Online tables as editing uses cryptic language, very abbreviated
  - The tables will run together in your mind
- Elements are grouped
- Plan to review them every few years as updates happen

General principles of tables

- Most read from the bottom up
- Modifying vs adding lines in a table
- Know which elements refer to lines in other tables
- Power of two - two eyes when doing modification to ANY table

Creating Location/Branch Codes

- Second most important step in profiling after indexing
- Determines the ease of Circulation profiling
- Location/Branch codes have implications throughout the system
  - Effects scoping, limiting, circulation, and statistics

Location/Branch Codes

- **located in bib, item, order, checkin records**
- **1 to 5 letters**
- **Can have multiple entries**
  - Total of 900 overall
  - Up to 100 in a single record
  - Creates a “variable field” in the record
- **No duplicates**
- **define a label that the patron sees in OPAC**
  - (up to 25 characters)
- **essential component of circulation profiling**

Location/Branch codes recommendations…

- **Hierarchical**
  - **Location of character means something**
  - **alphabetical with each letter a place holder**
    - refer (reference),rindx (ref index),ritab (ref index table),ritcd (ref index table cd)

Location/Branch codes recommendations…

- **Mnemonic**
  - **Tying it to full words helps**
    - **for ease of reading**

Location/Branch codes recommendations…

- **The number of characters as an indicator**
  - **we use different numbers of characters in different kinds of records**
    - **designates where it's used**

Getting the most out of Location/Branch codes

- The first letter
- A unique letter(s)
- Common letter(s)

The first letter - example in a shared system

- **Shared library system with three libraries**
  - **A**
    - (Asheville)
  - **B**
    - (Boone)
  - **C**
    - (Cullowhee)

The first letter

- **Using operator in create list**
  - **BETWEEN**
    - caaaa-czzzz
      - All of the Cullowhee collection can be selected
    - cpaaa-cpzzz
      - All of the cullowhee periodical collection can be sellected
    - raaaa-rzzzz
      - refer *refer
      - index *rindx

Common letter(s)

- **Using operator in create list**
  - **HAS**
    - mgenl bioz
    - rgenl mflz
    - bgenl libz
  - **We created three letter codes for location/department/disiplines so we would search for those within a code**

A unique letter

- Use a special letter (at the end) to denote a common attribute
  - z
  - k
  - q
  - x
  - rx
  - symbols

WNCLN Location Codes

- First letter of all location codes indicate the Library
  - each library subdivided location into broad categories using next one or two characters
- Only 5 letter codes in attached records
- Less then 5 letters
  - only in bib records
  - forced multiple locations in bibs (library, sub-category) for limiting, scoping, statistics
  - Only 1-letter codes have labels

Making use of the asterisk

- If r* for all reference
- if m* for all main stacks
- Means you only have to define the exceptions
  - if more then 5 exceptions, consider another first letter for that area

Periodicals and Newspapers

- **c** WCU
- **cp** (Bib location code - NL)
- **cpbgf** WCU PER G-FLOOR
- **cpbnd** WCU PER BOUND
- **cpcur** WCU PER CURRENT
- **cpers** WCU PERIODICALS
- **cpfch** WCU PER MFICHE
- **cpflm** WCU PER MFILM
- **cpicv** WCU PER INCOMPLETE
- **cpn** (Bib location code - NL)
- **cpnbf** WCU NEWSP CABINETS
- **cpncr** WCU NEWSP SERIALS
- **cpnmc** WCU NEWSP MCARD
- **cpnsr** WCU NEWSP RACK
- **cpnss** WCU NEWSP SHELF
- **cppro** WCU PER TECH SERV

More Examples

- **cgenl WCU GENERAL**
- **cgeno WCU GENERAL**
- **cgens WCU GENERAL STC**

- **argen UNCA GENERAL**
- **argew UNCA GENERAL**
- **argju UNCA JUV LIT**
- **argjw UNCA JUV LIT**

Organizing circulation tables

- Create a scheme in order to create consistency within and between all circulation profiling tables
  - makes finding, fixing, reading easier
- Plan for future growth and modification within each table
  - spread out entries

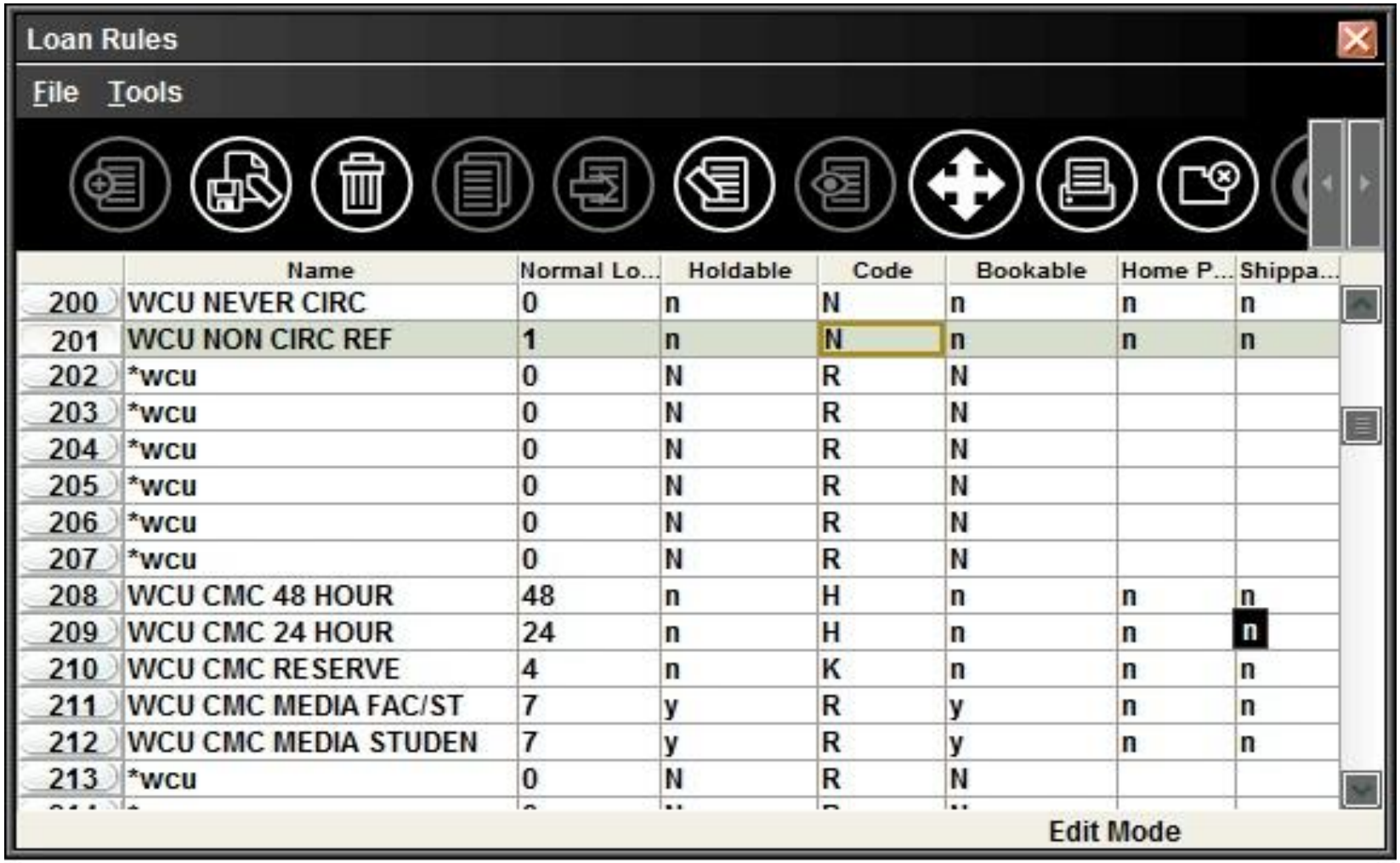
Within and Between tables

- **Group by library, location, patron category**
- **Remember that many tables read from bottom up**
  - **Default first, then exceptions**
    - Network then libraries in alphabetic order
    - Set number for start of each category
      - 256 - divided by number of libraries

Padding the table

- Placeholders names (*)
- Undefined locations
- Means you modify table / you NEVER add
  - loan rules
  - jump to a line

Example of padding and grouping a table

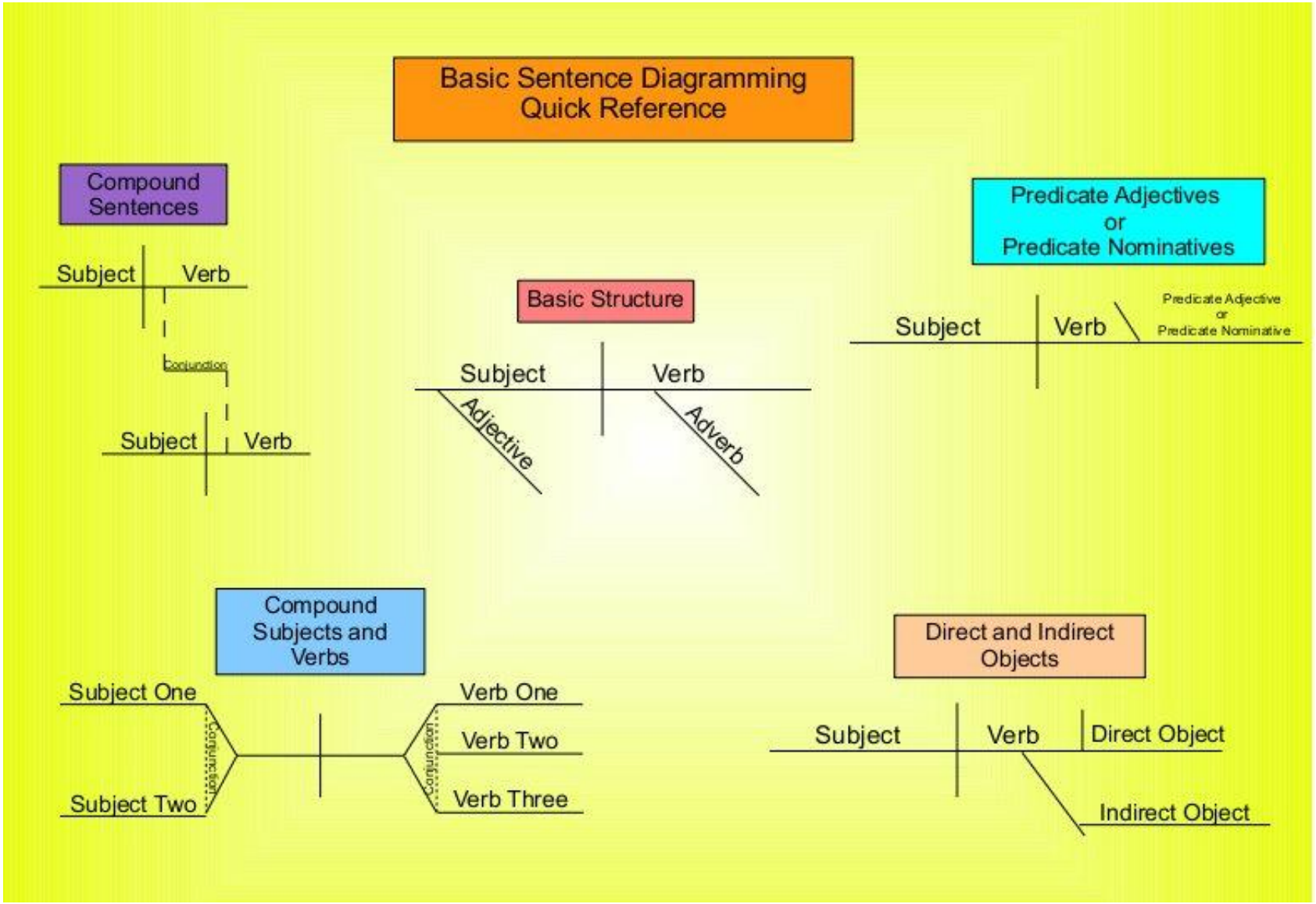


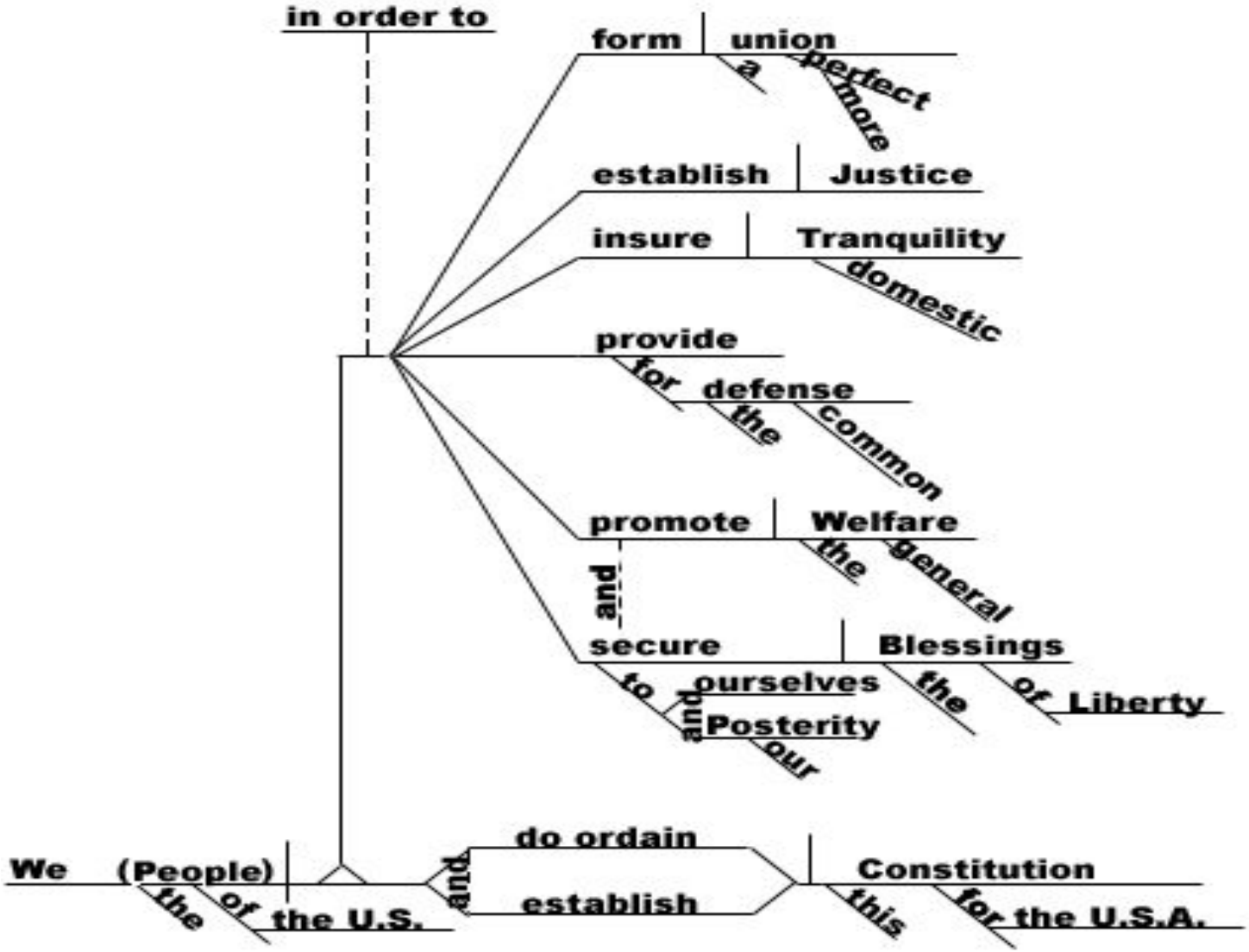
	Name	Normal Lo...	Holdable	Code	Bookable	Home P...	Shippa...
200	WCU NEVER CIRC	0	n	N	n	n	n
201	WCU NON CIRC REF	1	n	N	n	n	n
202	*wcu	0	N	R	N		
203	*wcu	0	N	R	N		
204	*wcu	0	N	R	N		
205	*wcu	0	N	R	N		
206	*wcu	0	N	R	N		
207	*wcu	0	N	R	N		
208	WCU CMC 48 HOUR	48	n	H	n	n	n
209	WCU CMC 24 HOUR	24	n	H	n	n	n
210	WCU CMC RESERVE	4	n	K	n	n	n
211	WCU CMC MEDIA FAC/ST	7	y	R	y	n	n
212	WCU CMC MEDIA STUDEN	7	y	R	y	n	n
213	*wcu	0	N	R	N		

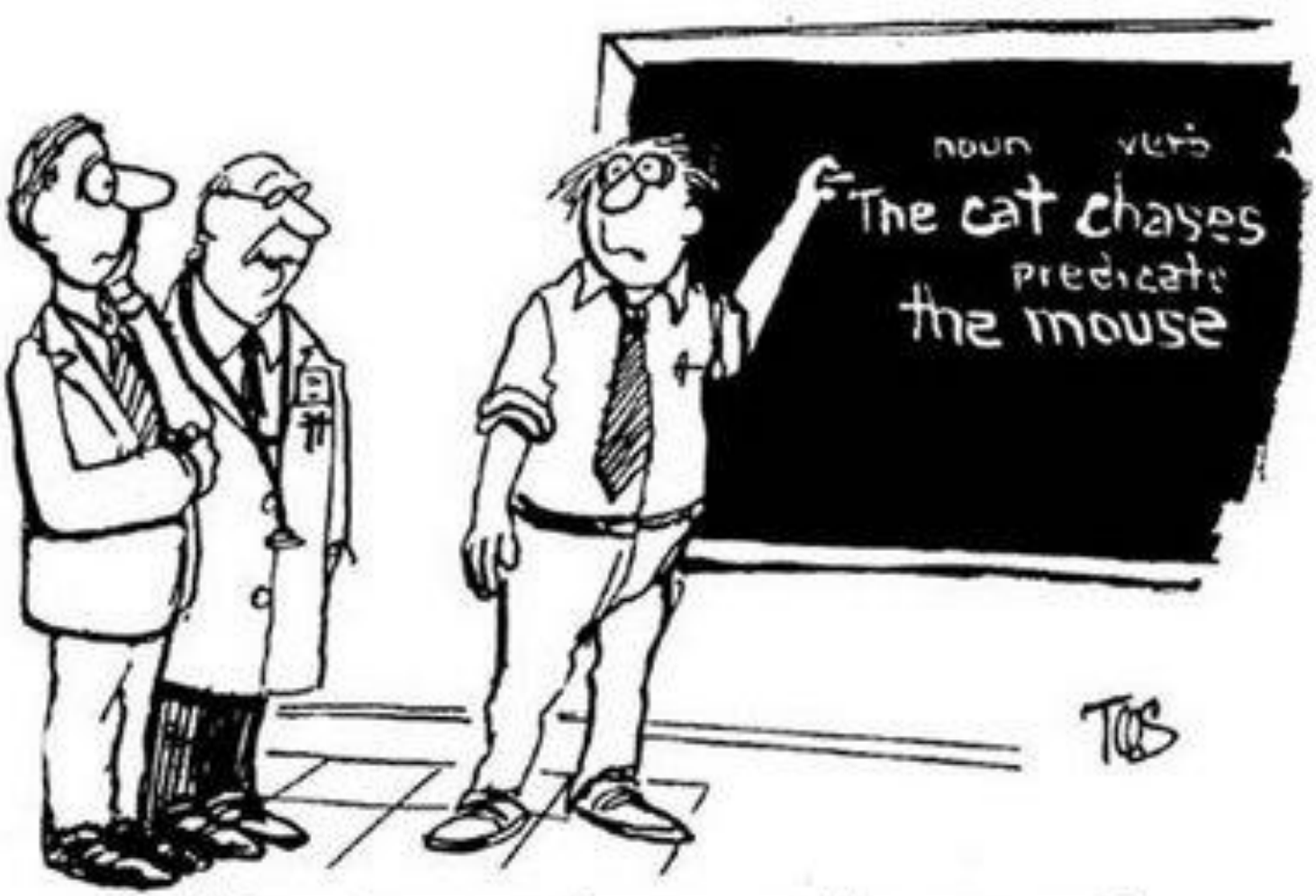
Visualizing loan rules

- **Create a visual picture or map of the most important of the 56 data elements of a Loan Rule**

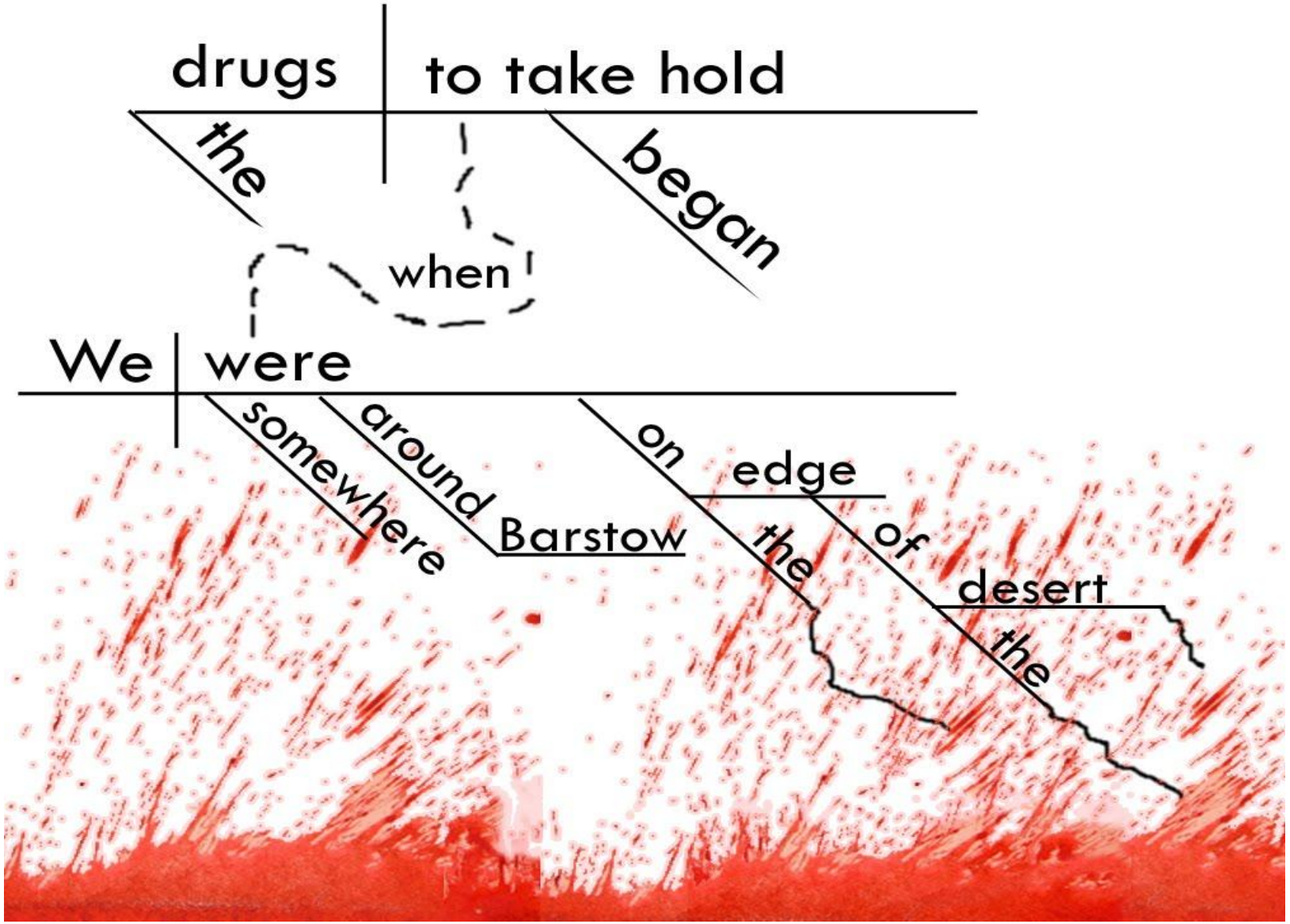
- **Do you remember diagramming sentences in school?**


Basic Sentence Diagramming
Quick Reference
Compound Sentences
Subject
Verb
Conjunction
Subject
Verb
Basic Structure
Subject
Verb
Adjective
Adverb
Predicate Adjectives
or
Predicate Nominatives
Subject
Verb
Predicate Adjective
or
Predicate Nominative
Compound Subjects and Verbs
Subject One
Subject Two
Conjunction
Verb One
Verb Two
Verb Three
Conjunction
Direct and Indirect Objects
Subject
Verb
Direct Object
Indirect Object

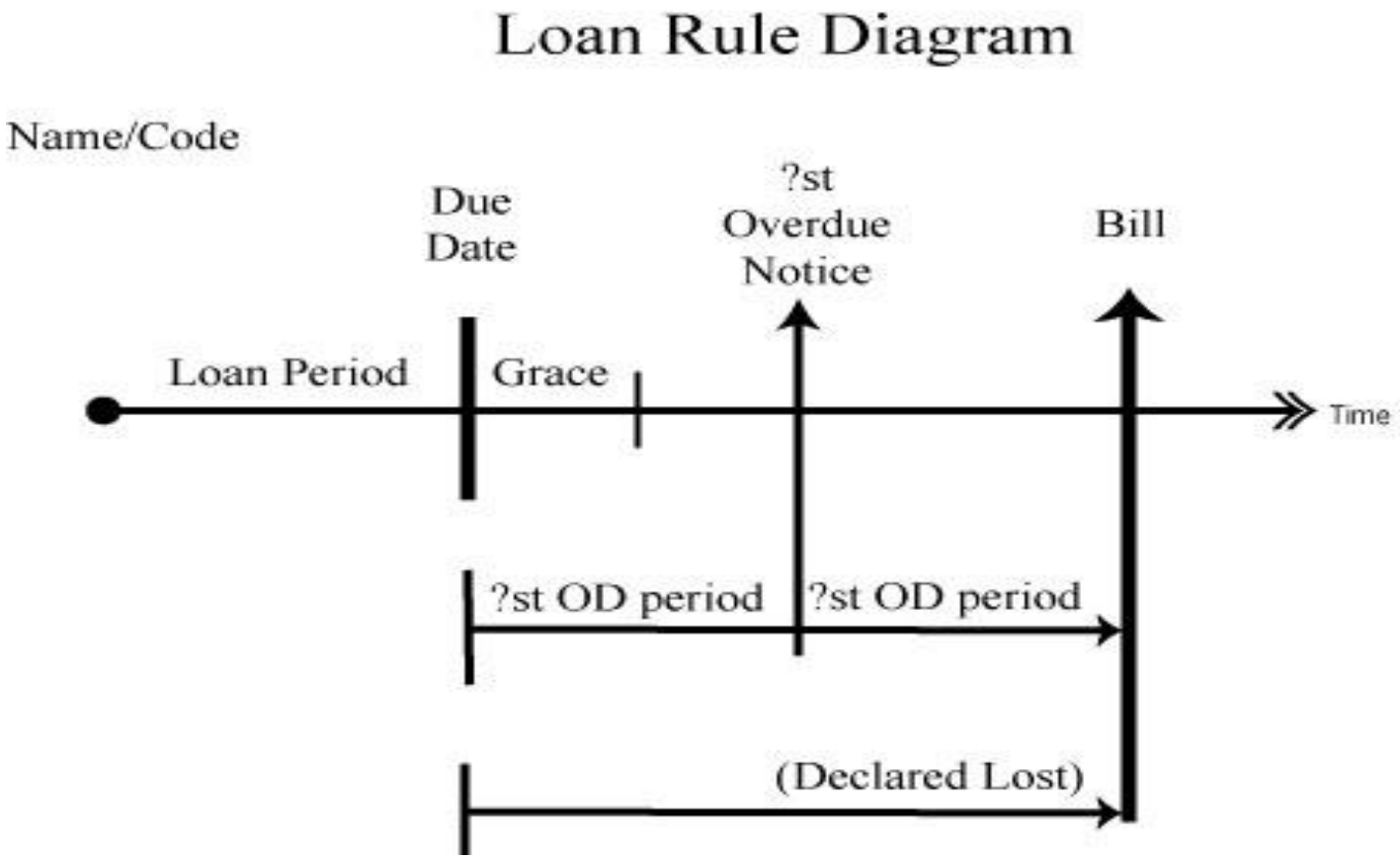

in order to
form
union
a
perfect
more
establish
Justice
insure
Tranquility
domestic
provide
for
defense
the
common
promote
Welfare
the
general
and
secure
Blessings
ourselves
to
and
Posterity
our
the
of
Liberty
We
(People)
the
of
the U.S.
and
do ordain
establish
Constitution
this
for the U.S.A.



"Seen it many times ... a clear case of Sentence Diagram Paralysis."

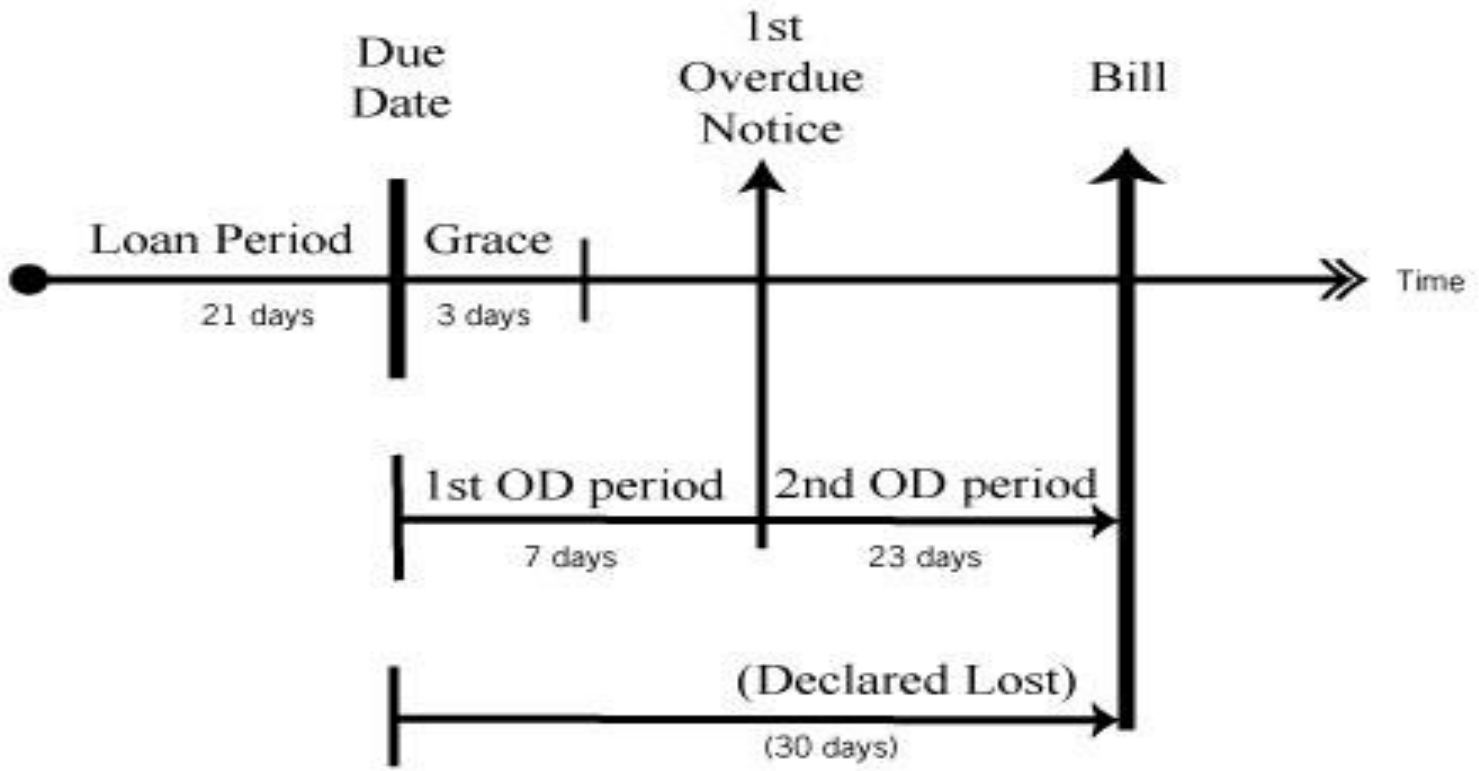

drugs
to take hold
the
began
when
We
were
somewhere
around
Barstow
on
edge
the
of
desert
the

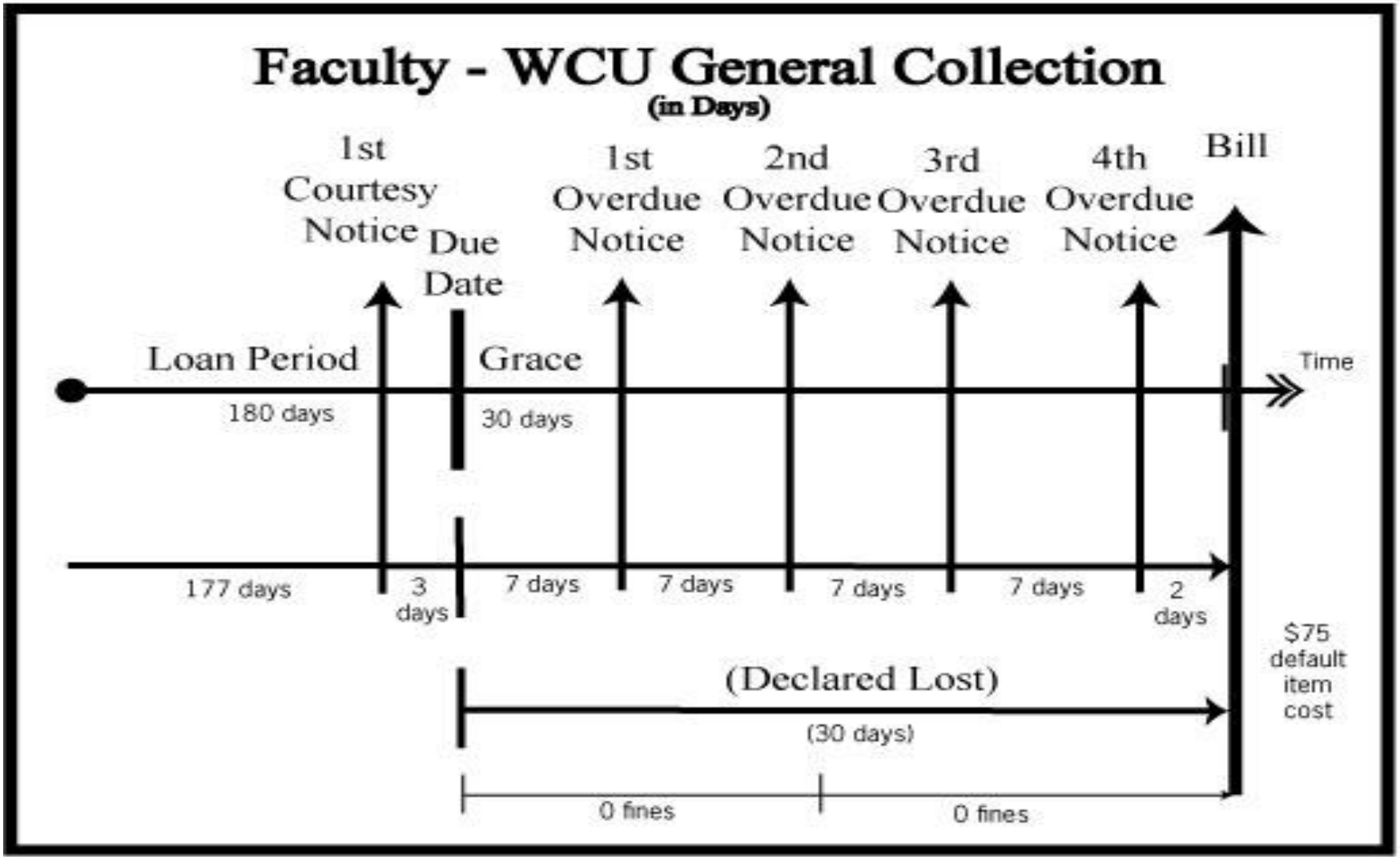
Looking at a loan rule using a diagram

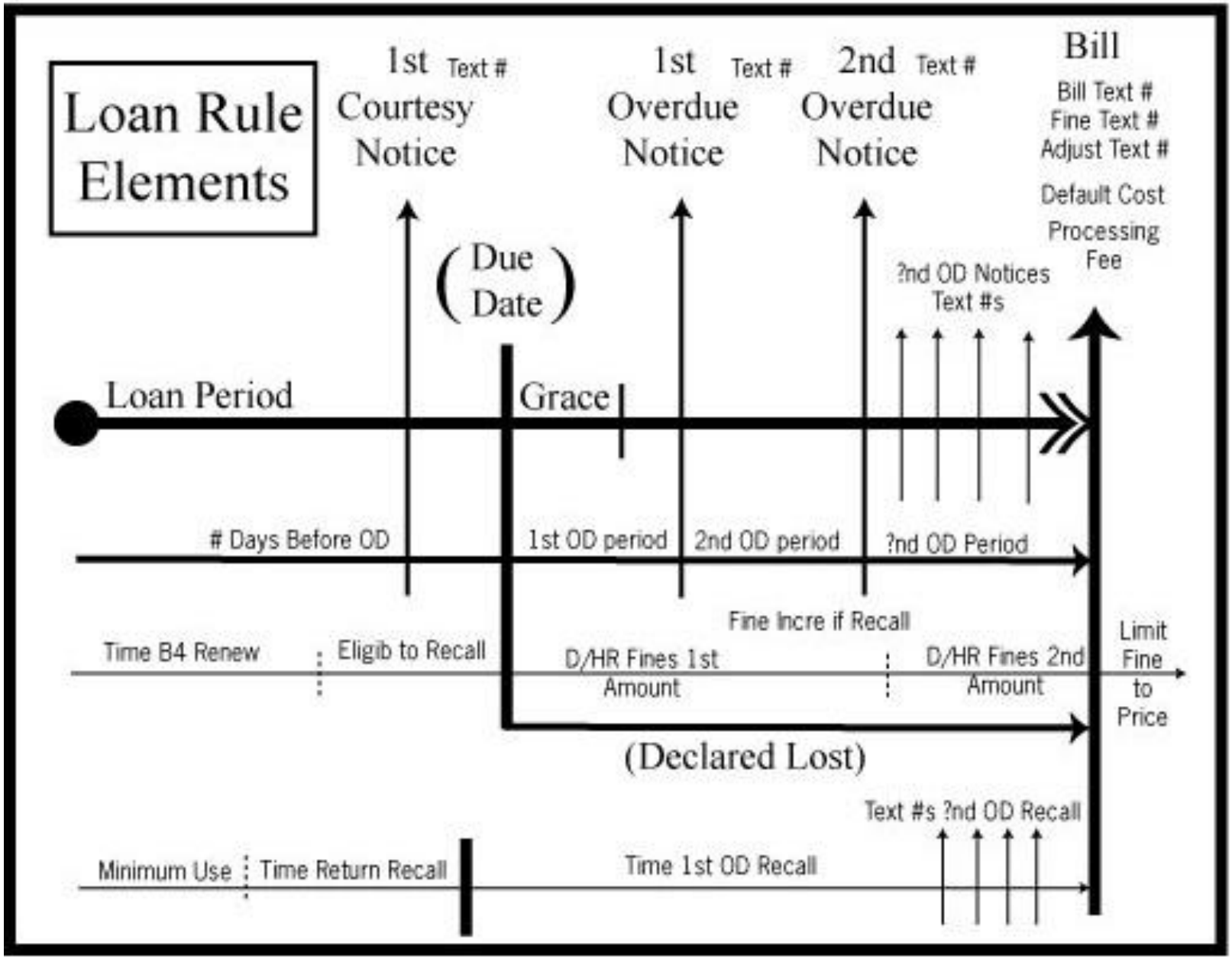


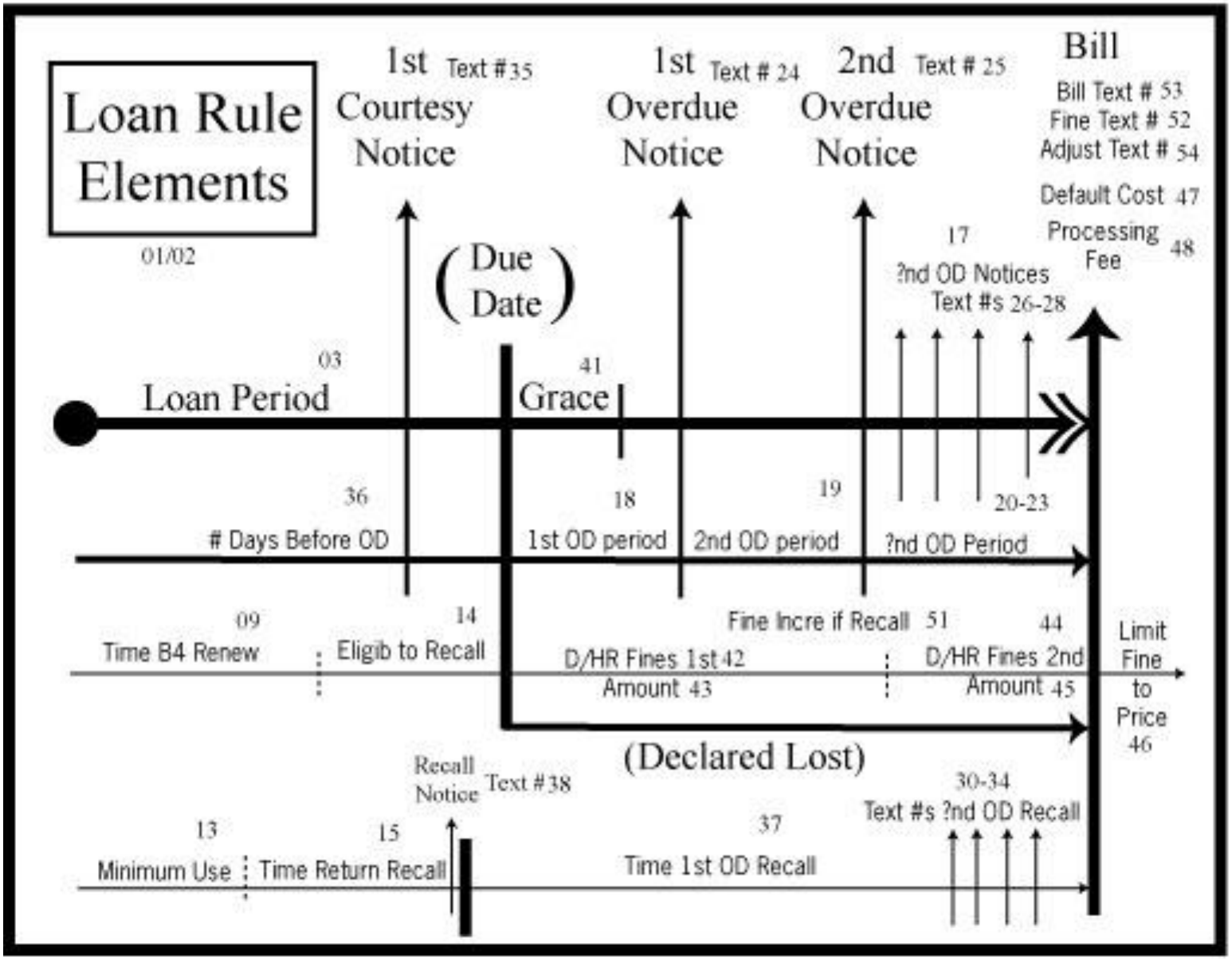
Students - WCU General Collection

(Default Loan Rule - in Days)




Faculty - WCU General Collection
(in Days)
1st Courtesy Notice
Due Date
1st Overdue Notice
2nd Overdue Notice
3rd Overdue Notice
4th Overdue Notice
Bill
Loan Period
180 days
Grace
30 days
Time
177 days
3 days
7 days
7 days
7 days
7 days
2 days
$75 default item cost
(Declared Lost)
(30 days)
0 fines
0 fines


Loan Rule Elements
1st Courtesy Notice
Text #
1st Overdue Notice
Text #
2nd Overdue Notice
Text #
Bill
Bill Text #
Fine Text #
Adjust Text #
Default Cost
Processing Fee
(Due Date)
?nd OD Notices Text #s
Loan Period
Grace
Days Before OD
1st OD period
2nd OD period
?nd OD Period
Fine Incre if Recall
Time B4 Renew
Eligib to Recall
D/HR Fines 1st Amount
D/HR Fines 2nd Amount
Limit Fine to Price
(Declared Lost)
Text #s ?nd OD Recall
Minimum Use
Time Return Recall
Time 1st OD Recall


Loan Rule Elements
01/02
1st Courtesy Notice Text #35
1st Overdue Notice Text # 24
2nd Overdue Notice Text # 25
Bill
Bill Text # 53
Fine Text # 52
Adjust Text # 54
Default Cost 47
Processing Fee 48
17
?nd OD Notices Text #s 26-28
(Due Date)
03
Loan Period
41
Grace
36
Days Before OD
18
1st OD period
19
2nd OD period
20-23
?nd OD Period
09
Time B4 Renew
14
Eligib to Recall
Fine Incre if Recall 51
D/HR Fines 1st Amount 42 43
44
D/HR Fines 2nd Amount 45
Limit Fine to Price 46
(Declared Lost)
Recall Notice Text #38
13
Minimum Use
15
Time Return Recall
37
Time 1st OD Recall
30-34
Text #s ?nd OD Recall

Presentation Outline

- General preparation ideas
- Creating location/branch codes
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- Visualizing loan rules

NO, NO, SEE, PUDDY TAT IS THE DIRECT OBJECT, AND TAW IS THE VERB...
I TAWT I TAW TAT A PUDDY
BETWEEN SHOWS, CARTOON CHARACTERS STILL HAVE TO GO TO SCHOOL...

Thank You!

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