



# Tips for Profiling in a Network Environment

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## Abstract

This presentation was given at two annual Innovative Users Group meetings. The tips include advice the presenter wishes she had been told before getting started as the chair of the implementation committee charged with profiling of the library system. Details about how to keep everyone informed about the process are included, along with examples of committees, meeting agendas, and coding suggestions.

Ellern, G.D. (1997, March 15). *Tips for Profiling in a Network Environment* [Presentation]. Innovative Users Group Meeting, Oakland, California.

Ellern, G.D. (1998, May 2-4). *Tips for Profiling in a Network Environment* [Presentation]. Innovative Users Group Meeting, Nashville, Tennessee.

Archived version from NC DOCKS available at: <http://libres.uncg.edu/ir/wcu/listing.aspx?id=37431>.

# Tips for Profiling in a Network Environment

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# Presentation Outline

- About WNCLN
- Profiling Do's and Don'ts
- Lines of Communication
- Network Coding Considerations
  - Branch/Location Codes
  - Circulation Parameters
  - Batchloading

# Western North Carolina Library Network

- **Three-Library Network**
  - University of North Carolina at Asheville
  - Appalachian State University
  - Western Carolina University
- **Installed August 1994**
  - Profiled April - Oct.
- **Completely installed Late Oct.**

# Info about WNCLN

- Database Size
  - 945,000 bibliographic records
  - 1,750,000 item records
  - 40,000 patron records
- Moved from LS2000
  - second system for network
  - allowed scoping
- Two farthest libraries are 145 miles from each other

# Profiling Do's and Don'ts

- I wish that someone had told me them before I started

# Don't think you can do this all yourself

Profiling is a collaborative effort. You will need the cooperative effort of many people and libraries in your network. As a coordinator, you need to think about your organization and how it works in order to plan your committees for effectiveness. Delegate! Delegate! Delegate!



# Do get help from local experts in your network

Tap the knowledge base you already have available. Ask for their input, visit their libraries, and get to know who your local experts are. Get them on committees! If you can't get them on committees, solicit them individually and give them credit.



# Don't think that profiling will be easy or quick

Profiling, especially in a network, will take many months of hard work. To make sure everyone is involved, listened to, and reaches consensus takes effort and patience.

# Do break the process up into manageable parts with achievable deadlines

Start by creating a schedule and timetable. Try to be realistic with your due dates and deadlines. Make sure you have planned in time for preparation and for practice. For example, planning circulation to become live the day after circulation training is not reasonable or sane. Be prepared to plan, replan and plan again.

# Don't be afraid to change your mind

As you and your committees learn more about the system, you will find there are unforeseen ramifications to the decisions you just made. Don't let this worry you much. There are very few decisions that are not changeable later - or for a small price.... Unfortunately, the "small price ones" are some of the first ones you'll make. (DP sheets) Make very sure that your database is the way you want it before you signoff on Testpac.

# Do ask lots of questions

It may seem like you always have questions. This is part of the profiling process. Remember, there is no such thing as a stupid question when profiling. Ask everyone questions; your implementation person, your trainer, and other users. You even might want to consider an outside consultant from a neighboring network.

# Do make sure to keep everyone in your network informed

This is the most important profiling tip. Anything and everything you do toward bringing your system live should be communicated to everyone that is interested. Cooperation and enthusiasm is directly related to how much everyone feels informed.



# Don't neglect your spouse, your family, your friends or yourself.

This is a very exciting process. There is an enormous amount of work to do. You will be learning exciting and interesting things about your network and your new library system. You will be spending huge amounts of money. The pressure is on to get it done and done correctly. Just make sure to eat, get up out of your chair, take breaks, take small vacations away from it all and go home at a reasonable hour. In addition, insist that your library invest in some good office equipment for you; most especially a good chair and a phone headset. You will spend lots of time at your computer on the phone.

# **The most important principle of successful profiling**

**Keep everyone  
informed**



# Lines of communication

## How to keep everyone informed

- Email
- Listserv
- Teleconference
- Phone Conference Calls
- Meetings

# Listserv or Mailserv

- Encourage EVERYONE to subscribe to it
- Make it the major info source
- Kinds of things to send via it
  - Minutes of meetings
  - Any and all communications with III
  - Personal Visits
  - Drafts of Profile sheets

## Examples of Mailserv emails from profiling WNCLN

#	From	Date	Subject
92	IN%"MCCALLISTERM@con	31-MAR-1994	partial answer from sean
93	IN%"BLAND@UNCA.EDU"	31-MAR-1994	Patron tapes
96	IN%"COOKEI@conrad.ap	31-MAR-1994	3 vs. 5 letter innopac codes
97	IN%"COOKEI@conrad.ap	31-MAR-1994	Field trips to UNCC, Winthrop
98	IN%"spickett@vega.iii	31-MAR-1994	answers
100	IN%"ELLERN@WCUVAX1	31-MAR-1994	More answers from Sean -2 (Sean please
101	IN%"BLAND@UNCA.EDU"	1-APR-1994	data comm stuff
102	IN%"BLAND@UNCA.EDU"	1-APR-1994	UNCA Recommendation for DP3A
144	IN%"drj@uncecs.edu"	8-APR-1994	patron questions
145	IN%"spickett@vega.iii	8-APR-1994	MTY tags
146	IN%"spickett@vega.iii	8-APR-1994	answers
147	IN%"WILKINSNCL@conra	8-APR-1994	ASU'S Proposal for DP-3A
148	IN%"WILKINSNCL@conra	8-APR-1994	ASU's Proposal for DP-9
149	IN%"WILKINSNCL@conra	8-APR-1994	ASU's Proposal for DP-4
150	IN%"REICHELML@conrad	9-APR-1994	RE: March 25 meeting continues....
154	IN%"VANAUSDALK@conra	11-APR-1994	Treatment of 130 (U.T.) in Innopac
156	IN%"BLAND@UNCA.EDU"	13-APR-1994	UNCA DP9 WORKSHEET
157	IN%"GREENE@UNCA.EDU"	13-APR-1994	III Documents Presentation
158	IN%"GREENE@UNCA.EDU"	14-APR-1994	III Remote Request and Check-out
160	IN%"BLAND@UNCA.EDU"	14-APR-1994	UNCA DP10 PROPOSAL
161	IN%"spickett@vega.iii	14-APR-1994	MTY tags
163	IN%"ELLERN@WCUVAX1	14-APR-1994	More questions answered by Sean (4/14/94)
166	IN%"LYSIAKLD@conrad.	15-APR-1994	Terminal purchase
221	IN%"lbills@brynmawr.	2-JUN-1994	Circulation Profiling Questions (fwd)
...			
23	IN%"ELLERN@WCUVAX1	27-JUN-1994	TESTPAC LOGIN INFORMATION!!
24	IN%"ELLERN@WCUVAX1	27-JUN-1994	Problems I have found
42	IN%"mgettys@vega.iii	29-JUN-1994	Questions from Karl -- 1 answer...
76	IN%"MITCHELLWB@conra	1-JUL-1994	Mapping problems
147	IN%"BLAND@unca.edu"	9-JUL-1994	RE: TESTPAC signoff? are we ready?
156	IN%"BLAND@unca.edu"	11-JUL-1994	Signoff
168	IN%"ELLERN@WCUVAX1	18-JUL-1994	A database is born!

# Committees and Meetings

- **Committees**

- Local Profiling Committees on each campus (chairs sat on NIC)
- Network Implementation Committee

- **Meetings**

- Local and Network Committee Meetings
  - Recommend weekly
  - Minutes sent to list
- Network Pow Wows

# **Network Profiling Pow Wow I**

Agenda

March 25, 1994

- 1) Schedule for the Day and Meeting Rooms
- 2) Implementation time table
  - a) Patron tapes
  - b) Central training
  - c) Testpac Tape (20,000) - Date for contrived records
- 3) Profiling Worksheets
  - a) Due Dates
  - b) Which worksheets need network agreements
- 6) Ideas on OPAC indexes and BCODES
- 7) Scoping issues
- 8) Question and Answer session

# **Network Profiling Pow Wow II**

Agenda

April 20, 1994

- 1) Schedule for the Day
- 2) Go over DP, OP and SP sheets
- 3) Lunch

## Innopac Profiling Worksheets timetable

March 25, 1994

<u>Worksheets</u>	<u>Due Date</u>	<u>Network</u>	<u>Effected areas/comments</u>
DP-3A	April 22	Y	Staff/Public screens
DP-4	April 22	Y	MARC tags stored in system
DP-4a	April 22	? ?	
DP-5	****		*We will use DP-6 instead?
DP-6	April 22	N	Location mapping from LS2K to III
-a	April 22	N	For initial load
-b	April 22	N	For live loads
DP-7	April 22	Y	Still working on this
DP-8	April 22	Y	See agenda item 6
DP-9	April 22	Y	Bib and Patron SC need to look at
DP-10	April 22	Y	Bib and Patron SC need to look at
DP-11	April 22	Y	Can we agree on variable-length?
OP-1	April 22	N	Each library needs its own Still working on limit by location
OP-2	April 22	Y	Based on DP-3a, Patron Screens
OP-3	April 22	Y	Based on DP-3a & OP-2, Patron Screens
C-1	June 24	Y/N	First 50 will be network categories 50-119 a (Asheville) 120-199 b (Boone) 200-255 c (Cullowhee)
C-2	?	Y	List of item types,
C-3	June 24	Y/N	For first 50 network categories
C-4 - C-8	June 24	N	
C-9	June 24	Y	Circ Options
C-10	June 24	N	
C-11	June 24	Y	3 PCODES, Circulation SC
C-12	? Y		ICODEs, can be done at any time
C-13	June 24	Y	Call number buckets revisited
C-14	?		?Depends upon C-9
A-1 - A-6	Aug 31	N	Separate Accounting modules means all decisions are for your library only
S-1	Aug 31	N	Separate Serials checkin modules means

# Network Coding Considerations

- Branch/Location Codes
- Circulation parameters
- Batchloading



# Branch/location codes

- Try to think about scoping, limiting, circulation, and statistics as you create them
  - hierarchical
  - mnemonic
- Consider changing circulation policies to group branch codes
  - take advantage of “\*”

# WNCLN Branch Codes

- Different codes for Bib records than Item records  
(bib - 1,2,3 letters)(item - 5 letters)
  - scoping and limiting advantages
  - cataloging upkeep disadvantages
- “Forced” multiple locations
- Code labels start with library

**OPAC Label Item Bib**

WCU ARCHIVES csarc c, es  
 WCU ATLAS CASE cratl c, cr  
 WCU BIBL crbib c, cr  
 WCU CAT.DEPT cleat c, cl  
 WCU CHILD.COLL cjmc c, cj  
 WCU CLOSED egeld c, eg  
 WCU CMC cjkit c, cj  
 WCU CMC cjtex c, cj  
 WCU CMC cmctr c, cm  
 WCU CMC APP cjapp c, cj  
 WCU CMC AUDIO CASS macs c, cm  
 WCU CMC AUDIO CD cmcds c, cm  
 WCU CMC VIDEODSC cmlas c, cm  
 WCU CMC MEDIA CENTER cmequ c, cm  
 WCU CMC OTHER cmoth c, cm  
 WCU CMC REF cjref c, cj  
 WCU CMC RESERVE cmres c, cm  
 WCU CMC SOFTWARE cmcomc, cm  
 WCU CMC VIDEO cmvid c, cm  
 WCU DOCS OFFICE cldoc c, cl  
 WCU GENERAL cgenl c, eg  
 WCU GENERAL cgeno c, cg  
 WCU GOVT cdusa c, cd, cdu  
 WCU GOV REF cdurf c, cd, cdu  
 WCU GOV MICROFICHE cdufc c, cd, cdu  
 WCU GOV MICROFILM cdufl c, cd, cdu  
 WCU GOV GROUND FLOOR cdugf c, cd, cdu  
 WCU GOV OVERSIZE cduov c, cd, cdu  
 WCU GOV PAMPHLET cdupm c, cd, cdu  
 WCU GOV POSTER cduop c, cd, cdu  
 WCU GOV CD ROM cdued c, cd, cdu  
 WCU GOV IND TBL cduit c, cd, cdu

**OPAC Label Item Bib**

WCU MAPS cemap c, cc  
 WCU MAPS DESK ccnsk c, cc  
 WCU MAPS REF cceref c, cc  
 WCU MICRO FICHE cfich c, cf  
 WCU MFICHE INDEX crfch c, cr  
 WCU MICRO FILM cfilm c, cf  
 WCU MFILM INDEX crflm c, cr  
 WCU NEWSP RACK cpnsr c, cp, cpn  
 WCU NEWSP SHELF cpnss c, cp, cpn  
 WCU NEWSP MCARD cpnmc c, cp, cpn  
 WCU NEWSP SERIALS cpner c, cp, cpn  
 WCU NEWSP CABINETS cpnbf c, cp, cpn  
 WCU ONLINE conln c, co  
 WCU PERIODICALS cpers c, cp  
 WCU PER CURRENT cpcur c, cp  
 WCU PER TECH SERV cppro c, cp  
 WCU PER BROWSING cpbrs c, cp  
 WCU PER INCOMPLETE cpicv c, cp  
 WCU PER BOUND cpbnd c, cp  
 WCU PER G-FLOOR cpbgf c, cp  
 WCU PER MCARD cpmed c, cp  
 WCU PER MFICHE cpfch c, cp  
 WCU PER MFILM cpflm c, cp  
 WCU REF crefe c, cr  
 WCU REF DESK crdsk c, cr  
 WCU REF DSK (govt) cdurd c, cd, cdu  
 WCU REF DSK (state) cdsrd c, cd, cds  
 WCU REF G-FLOOR crefg c, cr  
 WCU REF INDEX crinx c, cr, cp, cpx  
 WCU REF INDX SHELF crins c, cr, cp, cpx  
 WCU REF INDX TABLE crint c, cr, cp, cpx

# Circulation Parameters

- Use one letter bib branch code to organize the order of all tables (A,B,C)
- Use placeholders in loan rules and notice text
  - Quickly jump to your part of the tables
  - Number ranges would never change
  - Leave space between entries for future growth

# Batchloading

- Understanding the 949 tag
- Use premapping programming before loading records
- Have III change menu text

# 949 tags

- Find the details of how it's mapped in your MARC load table definition
  - 949 \_\_\_ for bib info
  - 949 \_1 for item info
  - 949 \_2 for order info
- We added two subfield tags |m (material type) and |j (bib location) to map fields into the bib record
  - have default values

# Premapping

- Usually used during the conversion process
- Use to map 5 letter item location codes to 1, 2, or 3 letter bib codes and put them into |j subfields
  - Must be kept up-to-date



# Menu Changes

- Default menu from III for loading MARC records make it hard to tell what to do next
- Multiple load tables can be menu options and complicate matters SO:
- Have III CHANGE wording to make it easier to understand

# Example of menu changes

## Load Bibliographic Records From Tape or IFTS

- F > LOAD/GET MARC records into Innopac using IFTS
- B > PREPROCESS IFTS file to then convert
- C > CONVERT an AUTHORIZED MARC file
- H > CONVERT BY MATCH-AND-ATTACH via OCLC#
- M > CONVERT BY OVERLAY via OCLC#
- + > ADDITIONAL options
- Choose one (F,B,C,H,M,S,V,L,T,A,R,Y,Q,+)

# Summary

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