



U

U

G

2018

ORLANDO

Changing the Rules

From Owning to Lending Library Circulation Rules

Lori Roholt
Kathy Setter
Indianhead Federated Library System
Eau Claire, Wisconsin



About Indianhead Federated Library System

- IFLS serves 53 public libraries in West-Central Wisconsin
- 49 are members of the automation and resource-sharing consortium known as MORE
- Started in 1999, went live on Millennium in July 2000
- Upgraded to Sierra in May 2012
- Currently on release 3.3.0_6



Why would we do this?!

■ History

- ◆ Always used default setting: LOCATION fixed-length field in the item record determines which loan rule to apply to a circulation transaction (“owning library rules”)
- ◆ As library service philosophies diverged, interest in “lending library rules” grew (Sierra’s “Loan Rule Determined by Checkout Location”)
- ◆ Most other consortia in Wisconsin use “lending library rules”
- ◆ Sticking point was control over items loaned around the system

■ Director’s Council Decision

- ◆ Ad hoc committee met in April and June 2016, and did not reach a recommendation; other advisory committees also weighed in
- ◆ Approved in September 2017, implemented April 2018



Planning

- The Loan Rule Determiner table had to be completely re-written to go from this:

cfave	2-5,9-17,20-22,...	88		350	Y
cfill	999	37		336	Y
cfjip	999	79		143	Y
cfaip	999	79		143	Y
cfico	999	79		327	Y
cfbbc	999	0,5,30,66		227	Y
cfbcs	999	0,5,30,66		227	Y
cfbnb	999	0,5,30		205	Y
cfkin	999	78,79		352	Y
cfjhs	999	999		269	Y
cfbnf	999	999		245	Y
cfbnl	999	999		245	Y
cfbnn	999	999		245	Y
cf***	3,30	999		279	Y
cfjbg	999	0,30		267	Y
cf**	999	999		156	Y

to this:

cf***	999	999		575	Y
cf***	999	121,124,126,12...		576	Y
cf***	999	122,149-152		577	Y
cf***	999	135,143,200		578	Y
cf***	999	173,174,176,17...		579	Y
cf***	999	172,175,178,18...		580	Y
cf***	999	170		581	Y
cf***	999	241		582	Y
cf***	999	233		583	Y
cf***	999	231		584	Y
cf***	999	229		585	Y
cf***	999	140,141,185		589	Y
cf***	3,30	999		588	Y
cf***	999	98		586	Y
cf***	999	99		587	Y

- Our largest library went from 29 loan rules to 15 and 104 lines in the determiner table to 16.



Planning

- Location in Determiner Table could only reflect circulating location
 - ◆ Taken from the Locations Served table
- Took opportunity to clean up loan rules and assign a unique set to each library
 - ◆ Makes tracking problems easier
 - ◆ Simple to make any changes to a library's circ policy
 - ◆ Estimated work would take 6 months
- Created new list of itypes to accommodate different loan lengths
 - ◆ Kept like formats together
 - ◆ Keep in mind 256 limit in itype table (0-255)



The Process

- Create list of all library's items
- Run through Statistics
- Export report by Itype
- Fill in chart, showing current itype with new itype
- Determine loan rules needed
 - ◆ Changes? Work from there.
 - ◆ No changes, use current loan rule determiner lines
- Identify conflicts, determine best new itype
- Enter loan rules
 - ◆ Named by library, loan length and fine amount



Creating New Loan Rules

- Copied existing rules and edited
- Better to copy by loan length, fines easier to change
- For libraries with fees or special fields, easier to create the first loan rule and copy and edit that one
- Added them from default down to non-circ
- Left empty lines between each library for future additions

670	BA 21 day	R	21	y	n	n	n
671	BA 14 day	R	14	y	n	n	n
672	BA 7 day	R	7	y	n	n	n
673	BA 2 day	R	2	n	n	n	n
674	BA Lucky Day 3 day	R	3	n	n	n	n
675	BA 1 hour	K	1	n	n	n	n
676	BA ILL 21 day noHnoR	R	21	n	n	n	n
677	BA NonCirc	N	7	n	n	n	n
678	Empty	R	0	n	n	n	n
679	Empty	R	0	n	n	n	n



Lending Library Rules

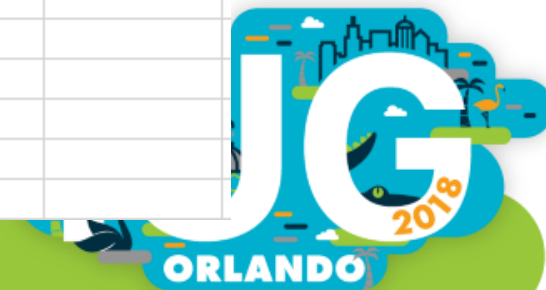
- All items (itypes) that may come into the library need a loan rule
 - ◆ Some libraries circulate new books for 2 weeks, some do not; where should the 2 week itypes go in your library's determiner lines?
 - ◆ Not all libraries own game discs; if one comes in for your patron, how do you want to circulate it?
 - ◆ Consistency in that library is still the goal
- Conferred with each library
 - ◆ All wanted to keep things the same for their patrons
 - If their magazines checked out for one week, all magazines coming in would be one week
 - Once exception – one library's DVDs
 - ◆ Differing fine rates for same itypes no possible in our setup
 - Would require double or triple the itypes
 - Age range only possibility – based on patron, not material



The Process

- Assign each itype a loan rule
 - ◆ Sort chart by loan rule number, in reverse order
 - ◆ Easier to pick out what is not the default
 - ◆ Makes entering loan rule determiner lines a breeze

Library:	Baldwin						
itype #	Label	Old itype #	Loan rule				
140	Ref/noncirc book	46	677			Loan rules	Rule #
141	Ref/noncirc misc		677			21 day no fine	670
185	Ref/noncirc AV	47,48	677			14 day no fine	671
170	ILL loan items	37	676			7 day no fine	672
229	Tablet Hourly	62	675	iPad		2 day no fine, no holds, no renewals	673
99	Lucky Day 3 day	99	674			3 day Lucky Day \$1 fine, no holds, no renewals	674
244	Equipment 2 day No Holds	10	673	Projectors		1 hour	675
122	Book 1 wk	58	672			21 day ILL, no holds, no renewals	676
148	Pamphlet	20	672			Non-circ	677
149	Newspaper		672				
150	Magazine 1 wk	1	672				
151	Magazine 2 wks		672				
152	Magazine 3 wks		672				
172	DVD 1 wk	9	672				
175	Blu-ray 1 wk	109	672				
178	Blu-ray/DVD combo 1 wk	108	672				



The Process

- Enter loan rule determiner lines
 - ◆ If not ready to update, keep Active line to No
 - ◆ Remember table reads from bottom to top
 - ◆ Insert lines going from itype specific up to default
 - ◆ Be aware of special ptypes that need their own line

	Location	Patron Type	Item Type	Age Range	Rule Number	Active
511	ba***	999	999		670	Y
512	ba***	999	121,173,176,179,181,183,232		671	Y
513	ba***	999	122,148-152,172,175,178,180,182,2...		672	Y
514	ba***	999	244		673	Y
515	ba***	999	99		674	Y
516	ba***	999	229		675	Y
517	ba***	999	170		676	Y
518	ba***	999	140,141,185		677	Y



It's the little things...

- Created Macros to open tables
 - ◆ Loan Rule Determiner table: %ALT+a%p%i%u
 - ◆ Loan Rule table: %ALT+a%p%i%r
- Opened 2 Sierra sessions
 - ◆ Did global updates on one, manual updates on the other



Global Update

- Converted itypes with Global Update
 - ◆ Done when library was closed
 - ◆ Refreshed list of items
 - ◆ Opened in global update by itype
 - ◆ Depending on number of entries, did 3-4 itypes at a time
 - ◆ Itypes with less than 5 entries done manually
 - ◆ Some itypes needed manual entry to separate one itype into several
 - Almost always equipment itypes
 - Game/Toy into Board Games and Toys
 - MP3 Audiobook into Playaway and MP3 discs



Finishing Touches

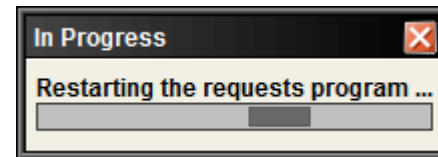
- After all items were updated, run list through Statistics again to make sure all items were updated
- Entered loan rule determiner lines, or if already there turn Active to Yes.
- Create a cheat sheet of old itypes to new for each library

Baldwin itypes		
Old itype	New itype	Description
0	120	Book hardcover 3 wks
1	150	Magazine 1 wk
2	182	VHS 1 wk
3	161	Audiobook cassette 3 wks
3	164	Music CD 3 wks
5	127	Book large print 3 wks
8	221	CDROM/Software
9	172	DVD 1 wk
10	247	Equipment 1 wk
10	244	Equipment 2 day No Holds
13	212	Board game
14	199	Kits 3 wks
14	230	Tablet 1 wk
20	148	Pamphlet
22	191	Sewing pattern



System Maintenance Must-Dos

- After each session of changing the loan rules and/or determiner table lines you must:
 - ◆ Restart Automatic Request Processing
 - Done by service commitment, or making a change to the Hold Pickup Locations table and saving it. On Close, you will see this:



- ◆ Restart the Web Options
 - Select a File
 - Open
 - Restart



Ask us how we learned this...



Lessons learned from first library

- Holds
 - ◆ Seriously decreased number of pages (300 down to 40)
 - ◆ Opened helpdesk ticket; solution was restarting request processing and web options
- Special ptypes consortium wide
 - ◆ At bottom of determiner table; ascertain if all itypes apply
- Special ptypes in library (Home delivery)
 - ◆ Need special loan rule and determiner table line

731	ec***	999	140,185,196		380	Y
732	ec***	30	999		381	Y
733	ec***	999	98		384	Y
734	ec***	999	99		383	Y
735	?????	17,18	0-97,100-255		281	Y
736	?????	13	0-97,100-255		152	Y
737	?????	22	0-97,100-255		278	Y
738	?????	16	0-97,100-255		151	Y
739	?????	14	0-97,100-255		275	Y
740	?????	14	2,9,41,42,65,10...		288	Y



System change to Lending Library Rules

- Done by Innovative Helpdesk overnight
- Lots of staff warning and education
- Change went smoothly!



[This Photo](#) by Unknown Author is licensed under [CC BY-NC-SA](#)



Conclusions

- Time to complete project: about 6 months
- Side benefits: loan rule and item type clean-up
- Remaining issues: waiving fines and allocating fines paid online



Questions?

Thank you!

Lori Roholt roholt@ifls.lib.wi.us

Kathy Setter setter@ifls.lib.wi.us

