

Cleaning up Branches and Loan Rule Determiner Tables in Sierra



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Presentation Outline

1. The Problem: where we started and why we had to change
2. The Plan: what we thought we needed to do
3. The Solution: what actually happened



Who we are

- City of Cambridge - Population of 129,920 (2016 Census)
- Idea Exchange (Formerly Cambridge Public Library) has 4 library locations + 3 art galleries
- New Digital Library coming June 2018
- Sierra ILS with Encore discovery layer



Where we started

238 Branch Codes

341 lines in our Loan Rule Determiner Table



14	call	Clemens Mill - Main Floor	?	#27	77	hall	Hespeler - Main Floor	?	135	pall	Preston - Main Floor	?
15	call7	Clemens Mill - Main Floor	?	#36	78	hall7	Hespeler - Main Floor	?	136	pall7	Preston - Main Floor	?
16	calp	Clemens Mill - Main Floor	3 weeks		79	halp	Hespeler - 2nd Floor	3 weeks	137	palp	Preston - Main Floor	3 weeks
17	camg	Clemens Mill - Main Floor	3 weeks		80	hamg	Hespeler - 2nd Floor	3 weeks	138	pamg	Preston - Main Floor	3 weeks
18	canf	Clemens Mill - Main Floor	3 weeks		81	hanf	Hespeler - 2nd Floor	3 weeks	139	panf	Preston - Main Floor	3 weeks
19	capb	Clemens Mill - Main Floor	3 weeks		82	hapb	Hespeler - 2nd Floor	3 weeks	140	papb	Preston - Main Floor	3 weeks
20	carez	Clemens Mill - Reference	no loan		83	harez	Hespeler - Reference	no loan	141	parez	Preston - Reference	no loan
21	casb	Clemens Mill - Main Floor	3 weeks									
22	castz	Clemens Mill Storage	3 weeks		84	hastz	Hespeler Storage	3 weeks	142	pastz	Preston Storage	3 weeks
23	catb	Clemens Mill - Main Floor	3 weeks		85	hatb	Hespeler - 2nd Floor	3 weeks	143	patb	Preston - Main Floor	3 weeks
24	cau	Clemens Mill - Main Floor	3 weeks		86	hau	Hespeler - 2nd Floor	3 weeks	144	pau	Preston - Main Floor	3 weeks
25	caun	Clemens Mill - Main Floor	3 weeks		87	haun	Hespeler - 2nd Floor	3 weeks	145	paun	Preston - Main Floor	3 weeks
26	cavd7	Clemens Mill - Main Floor	1 week		88	havd7	Hespeler - 2nd Floor	1 week	146	pavd7	Preston - Main Floor	1 week
27	cavg	Clemens Mill - Main Floor	3 weeks		89	havg	Hespeler - Main Floor	3 weeks	147	pavg	Preston - Main Floor	3 weeks
28	cavgr	Clemens Mill - Main Floor	3 weeks		90	havgr	Hespeler - Main Floor	3 weeks	148	pavgr	Preston - Main Floor	3 weeks
29	cavr1	Clemens Mill - Main Floor	1 day		91	havr1	Hespeler - 2nd Floor	1 day	149	pavr1	Preston - Main Floor	1 day
30	caya	Clemens Mill - Main Floor	3 weeks		92	haya	Hespeler - 2nd Floor	3 weeks	150	paya	Preston - Main Floor	3 weeks
31	ccdb	Clemens Mill - Main Floor	3 weeks		93	hcdb	Hespeler - 2nd Floor	3 weeks	151	pcdb	Preston - Main Floor	3 weeks
32	ccdm	Clemens Mill - Main Floor	3 weeks		94	hcdm	Hespeler - 2nd Floor	3 weeks	152	pcdm	Preston - Main Floor	3 weeks

Location Codes



18	pacd7	1-19,21,22,25,35-37	4,16	13	Y
19	qacd7	1-19,21,22,25,35-37	4,16	13	Y
20	cacdb	1-19,21,25,35-37,40	4,7,16	11	Y
21	hacdb	1-19,21,25,35-37,40	4,7,16	11	Y
22	pacdb	1-19,21,25,35-37,40	4,7,16	11	Y
23	qacdb	1-19,21,25,35-37,40	4,7,16	11	Y
24	cafi	1-14,17-19,21-22,27,40	0	7	Y
25	hafi	1-14,17-19,21-22,27,40	0	7	Y
26	pafi	1-14,17-19,21-22,27,40	0	7	Y
27	qafi	1-14,17-19,21-22,27,40	0	7	Y
28	qafi	1-15,17-19,21,22,25-27,36,37,40	0,1,2,5	7	Y
29	qafir	1-15,17-19,21,22,25-27,36,37,40	0,1,2,5	7	Y
30	call	1-19,21-22,25-27,35-37,40	0,1,2,15,23	7	Y
31	hall	1-19,21-22,25-27,35-37,40	0,1,2,15,23	7	Y
32	pall	1-19,21-22,25-27,35-37,40	0,1,2,15,23	7	Y
33	qall	1-19,21-22,25-27,35-37,40	0,1,2,15,23	7	Y
34	call7	1-19,21-22,25-27,35-37,40	0,1,2,13,17	3	Y
35	hall7	1-19,21-22,25-27,35-37,40	0,1,2,13,17	3	Y
36	pall7	1-19,21-22,25-27,35-37,40	0,1,2,13,17	3	Y
37	qall7	1-19,21-22,25-27,35-37,40	0,1,2,13,17	3	Y
38	calp	1-14,17-19,21,27,40	0	7	Y

The Problems

- ▶ We were using Location codes instead of ITYPE to designate collections
 - ▶ Each new type of item in our collection was given 4 new Location codes which then had to be entered into the Loan Rule Determiner table 4 times
 - ▶ No one had recorded which items corresponded to which Location codes
- ▶ We couldn't just merge/delete/create new Location codes
 - ▶ These codes are “special” - used in so many parts of the system that deleting one still in use may affect borrowing in unexpected ways
- ▶ We wanted to add many new and unusual items into our borrowing collection and we were implementing CollectionHQ
 - ▶ We needed to simplify our location codes!

The Solution (we hoped)

With support from management, we came up with a plan:

1. Each type of item with a unique loan period will be given a unique ITYPE. (June 8)
2. Create new Loan Rules as needed. Rename and “empty” old Loan Rules. (June 19)
3. Insert the new ITYPES into the Loan Rules Determiner Table (June 19)
4. Run lists to change all old ITYPES to new (June 19)
5. Create new Location codes based only on shelving locations within the libraries (June 23)
6. Search Sierra for all old Location codes and recommend changes and deletions (June 23)
7. MEETING
8. Rewrite the LRDT with new codes, insert it into the top of the LRDT, make it active and turn off the old lines in the LRDT (July 14)
9. Cross all fingers + toes and run lists to change all the old Location codes to new (July 14)

Step One:

Print out Related Tables and Post Them

- ▶ 5 main tables in Sierra affect the loan rules:
 - ▶ **Branches** -- Admin>Parameters>General>
 - ▶ **Item Types** -- Admin>Parameters>General>
 - ▶ **Patron Type** -- Admin>Parameters>General>
 - ▶ **Loan Rules** -- Admin>Parameters>Circulation>
 - ▶ **Loan Rule Determiner**-- Admin>Parameters>Circulation>

- ▶ Other tables that affect loan rules:
 - ▶ **Patron Blocks** -- Admin>Parameters>General>
 - ▶ **Hours Open** (needed for hourly loans) - Admin>Parameters>Circulation>

London

From Type	To Type	Rule Number
999	99	1
999	99	2
999	99	3
10.10.10.10	10.10.10.10	10
10	10	11
10	10	12
10	10	13
10	10	14
10	10	15
10	10	16
10	10	17
10.10.10.10	10.10.10.10	18
10.10.10.10	10.10.10.10	19
10.10.10.10	10.10.10.10	20
10.10.10.10	10.10.10.10	21
10.10.10.10	10.10.10.10	22
10.10.10.10	10.10.10.10	23
10.10.10.10	10.10.10.10	24
10.10.10.10	10.10.10.10	25
10.10.10.10	10.10.10.10	26
10.10.10.10	10.10.10.10	27
10.10.10.10	10.10.10.10	28
10.10.10.10	10.10.10.10	29
10.10.10.10	10.10.10.10	30
10.10.10.10	10.10.10.10	31
10.10.10.10	10.10.10.10	32
10.10.10.10	10.10.10.10	33
10.10.10.10	10.10.10.10	34
10.10.10.10	10.10.10.10	35
10.10.10.10	10.10.10.10	36
10.10.10.10	10.10.10.10	37
10.10.10.10	10.10.10.10	38
10.10.10.10	10.10.10.10	39
10.10.10.10	10.10.10.10	40
10.10.10.10	10.10.10.10	41
10.10.10.10	10.10.10.10	42
10.10.10.10	10.10.10.10	43
10.10.10.10	10.10.10.10	44
10.10.10.10	10.10.10.10	45

Proposed New Load Rules Table

From Type	To Type	Rule Number	Comment
1	1	1	New Connection
2	2	2	New IP
3	3	3	New IP
4	4	4	New IP
5	5	5	New IP
6	6	6	New IP
7	7	7	New IP
8	8	8	New IP
9	9	9	New IP
10	10	10	New IP
11	11	11	New IP
12	12	12	New IP
13	13	13	New IP
14	14	14	New IP
15	15	15	New IP
16	16	16	New IP
17	17	17	New IP
18	18	18	New IP
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36	36	36	New IP
37	37	37	New IP
38	38	38	New IP
39	39	39	New IP
40	40	40	New IP
41	41	41	New IP
42	42	42	New IP
43	43	43	New IP
44	44	44	New IP
45	45	45	New IP

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09/4/17

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BRANCHES

Name	Description
Branch 1	
Branch 2	
Branch 3	
Branch 4	
Branch 5	
Branch 6	
Branch 7	
Branch 8	
Branch 9	
Branch 10	
Branch 11	
Branch 12	
Branch 13	
Branch 14	
Branch 15	
Branch 16	
Branch 17	
Branch 18	
Branch 19	
Branch 20	

PORT TYPE

Name	Description
Port Type 1	
Port Type 2	
Port Type 3	
Port Type 4	
Port Type 5	
Port Type 6	
Port Type 7	
Port Type 8	
Port Type 9	
Port Type 10	
Port Type 11	
Port Type 12	
Port Type 13	
Port Type 14	
Port Type 15	
Port Type 16	
Port Type 17	
Port Type 18	
Port Type 19	
Port Type 20	

PRTYPE

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Step Two:

Create some massive spreadsheets!

1. Map out the **collections** - Itemize each type of borrowable item with detailed loan rules, itypes, mattypes, location codes, and loan rule #
2. Map out **who can take out what for how long** - Itemize PTYPE and borrowing restrictions

Item	loan	Renewals	Holdable	fine	fine max	iType	MatType	Call No	Loan Rule	PTYPE limit*	Sugge
VLS for Kids Kits	21 days	2	y	.15	4.50	32 J Book	h Book Club	VLS FOR KIDS KIT	8		
Quest	21 days	2	y	.15	4.50	32 J Book	a Book	EAGLE EYE	8		Was lo
MUSIC											
Music CD	7 days	2	y	.30	9.00	4 Music on CD	j Music on CD	CD [GENRE]	13		
J Music CD	7 days	2	y	.30	9.00	4 Music on CD	j Music on CD	J CD MUSIC	21		loan r
OTHER											
Active Living Collection	2 hour	no	n	none	\$0 or billed	8 2 Hour Loan	x Sports Equipment	ACTIVE LIVING	32		was ity
Board Games	21 days	2	y	.30	9.00	23 Board Games	w Games & Puzzles	GAMES	7		limit of
Chromebooks	2 hour	n	n	none	\$0 or billed	10 St. Benedicts	s Electronic Device	CHROMEBOOK		St. Benedict Students	
Cricut	2 hour	n	n	none	\$0 or billed	8 2 Hour Loan	s Electronic Device	CRICUT TOOL BOX	32		
Daisy Reader	6 weeks	no	y	\$2.00	16.00	15 Book Club Set	s Electronic Device	DAISY READER	28		
Guitar Acoustic	21 days	2	y	.30	9.00	20 3D Object 3 Week Loan	r Musical Instrument	GUITAR ACOUSTIC	7		was ity
Guitar Electric	21 days	2	y	.30	9.00	20 3D Object 3 Week Loan	r Musical Instrument	GUITAR ELECTRIC	7		was ity
Maker Kit	21 days	2	y	.30	9.00	18 Maker Kit	n Kit	MAKER KIT	7		was loa
Maps	21 days	2	y	.30	6.00	9 Maps	e Map	MAPS	9		EMPTY
Microfilm	none	none	n	none	n	19 Non-Circulating	k Microform	MICROFILM	1		Was 19
Museum Pass	7 days	no	y	.30	9.00	24 Passes	none	MUSEUM PASS	26		
Music Hub Instrument:	2 hour	no	n	none	\$0 or billed	8 2 Hour Loan	r Musical Instrument				
Pedometer Kits	6 weeks	no	y	\$2.00	16.00	15 Book Club Set	n Kit	PEDOMETER KITS	28		
Power Saving Toolkit	7 days	2	y	.30	9.00	17 3D Object 7 Day Loan	n Kit	POWER SAVING TOOLKIT	13		Was iTy
Puzzles	21 days	2	y	.30	9.00	20 3D Object 3 Week Loan	w Games & Puzzles	PUZZLES	7		Was M
Selfie Sticks	7 days	2	y	.30	9.00	17 3D Object 7 Day Loan	s Electronic Device	YOUNG ADULT MEMBER SERVICE	13		Was Ity
Teen Media Kit	2 days	no	n	none	\$0 or billed	14 2 Day Loan	s Electronic Device		3		
Tools	7 days	2	y (only at PR)	2.00	16.00	6 Tools	p Tools	TOOL [EDGER]	5		

A	B	C	D	E
PTYPE	All Item Borrowing?	If NO, what ITYPE Restrictions? (Loan Rules Determiner Table)	Any other Restrictions? (Patron Blocks Table)	Any other Restr (Loan Rules T
1 Adult-Resident	Yes		2 of 3 Video Game / 26 Video Game 18+ 2 of 29 New DVD / 30 New DVD 18+ 20 of 13 DVD / 25 DVD 18+	
2 Juvenile Resident	No	3 Video Game 6 Tools 13 DVD 25 DVD 18+ 26 Video Game 18+ 27 Rapid Read 29 New DVD 30 New DVD 18+	no	
3 YA - Resident	No	6 Tools 25 DVD 18+ 26 Video Game 18+ 30 New DVD 18+	2 of 3 Video Game 2 of 29 New DVD 20 of 13 DVD	
4 Non-Resident Adult	Yes		2 of 3 Video Game / 26 Video Game 18+ 2 of 29 New DVD / 30 New DVD 18+ 20 of 13 DVD / 25 DVD 18+	

Step Three: Create new ITYPES

1. Identify patterns in the collection - Group those with the same loan rules together and create new/rename ITYPES for those with same rule
2. Send a proposal out to the team with the new ITYPES
3. Add the new ITYPES to ITYPES table
4. Add the new ITYPES to the Loan Rules Determiner table
5. Before opening, perform a rapid update of the records containing these items

Step Four: Clean up the Loan Rules

The names of old loan rules did not reflect what they were actually used for

Sent out a proposal to team with actions to be taken with Loan Rules:

1. Renamed so that the name column, when sorted, will easily show characteristics and differences:
 - ▶ 21D 30F \$9M H 2R
2. Any no longer in use labelled as “empty”

Step Five:

Map out Changes to the Branch table

1. Make a draft of the new Branch table - branches based only on library shelving locations
2. Run lists to find where branch codes are used in bib, patron & item records. Map these out on a spreadsheet along with how you want them to change
3. Send both the draft of the new Branch table and the changes to the old out to your team



Step Six: Make a Draft of the Loan Rule Determiner Table

If ITYPES were created properly, you should be able to wildcard most locations in the table

1. Once all parties agree on the new Branches and LRDT, insert your new LRDT into the top lines of the old.
2. Make the old rules in the LRDT inactive

Step Seven: Change those Location codes!

1. Agree on a Branch code changeover date with all parties involved and send out a memo to staff
2. When you're not open, insert the new branch codes into all areas where the branches are involved
 - ▶ Locations Served (Admin Corner: Additional > Alter > Circ Parameters > Locations Served)
 - ▶ Location Mapping Table (Admin Corner: Additional > Maintain Links > Update > Examine)
 - ▶ Branches Table (Sierra)
 - ▶ Hold Pickup Locations (Sierra)
 - ▶ Record Templates (sierra)
 - ▶ Teleforms Locations (Admin Corner: Circulation > Edit TNS location map)
 - ▶ Maintain Scope Table - for Encore too (Admin Corner: Additional > N Scope Menu)Contact Help Desk to alter table via Service Commitment WebPAC > Update Scopes
 - ▶ Preferred location in staff member logins (Sierra Admin)

Step Seven: Change those Location codes! (continued)

3. Run lists to change all of the Branches in the item records (Ideally, before you open)
4. Delete all the old branch codes from the areas where used in Sierra
5. Delete the old LRDT

Hiccups and Results

- ▶ Success + Zero downtime!
- ▶ Holds placed in Encore on available items with new ITYPES did not appear on our paging lists because we did not restart automatic request processing
- ▶ Some ITYPE changes resulted in returned materials sorting to the wrong bin
- ▶ Some ITYPE changes resulted in the wrong messages appearing on Self-Checks
- ▶ Scopes broke in Classic Catalogue - However this led us to reexamine facets in Encore and a redo of MAT TYPES