



Making Your Item Records Make Sense

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Who We Are

- Independent district with 20 branches
- Polaris users for over 15 years
- Host Polaris on premise
- Polaris is part of our IT Portfolio Management Process
 - Business owners are Collection Management (including technical services) and Customer Experience (Public Services)
- Simply Reports user
- SQL data dude

The ability to take data - to be able to understand it, to process it, to extract value from it, to visualize it, to communicate it, is going to be a hugely important skill in the next decade.

Hal Varian: Google's chief economist

The Whys

- Record coding was legacy from previous ILS
- 170+ collection codes that were mostly mirrored by statistical code
- Grown organically over the years with no definition or structure
- Pulling data was challenging



Previous Work that Set Us Up For Success

- Polaris System Configuration Audit
- Polaris Permissions Project
- Leadership Academy Capstone Project – Polaris Upgrade



Methodology

- Cross departmental project team



Corrine Weatherly
KC



Hannah Taylor
UP



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Annabel Guimont
PKS



Tracey Thompson
CM



Heather Kaufman
CM



Luisa Diaz
IT

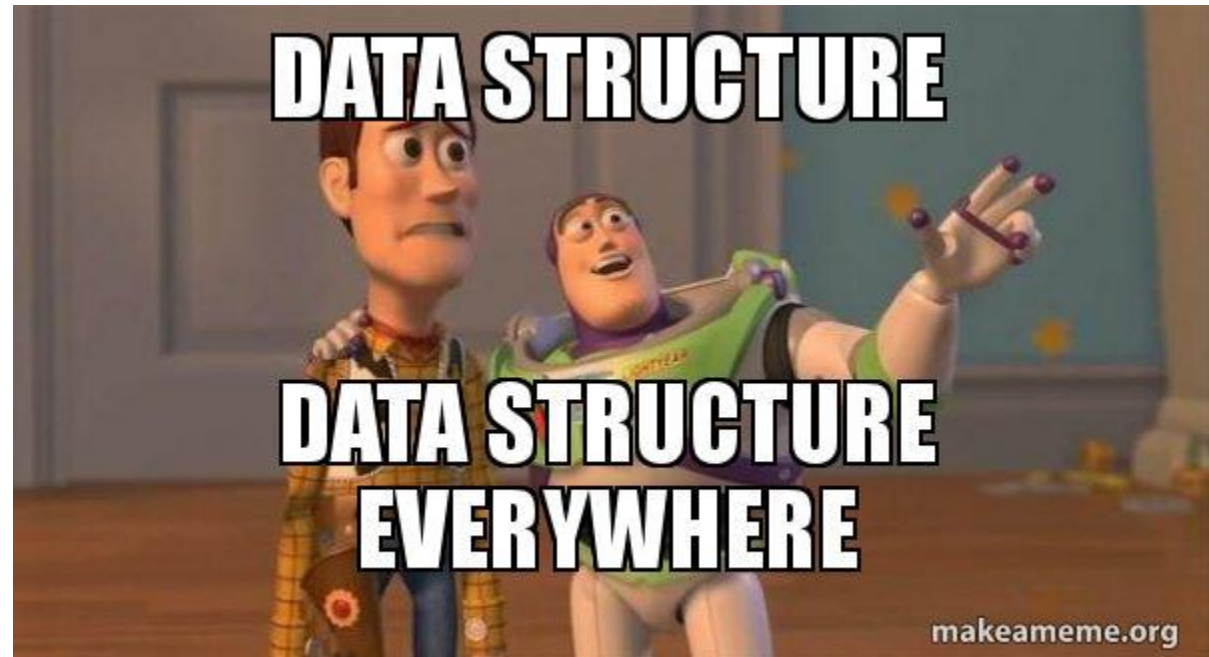
Methodology

- Project management tools such as project charter, work breakdown structure, etc.
- Stakeholdered with Community of Practice (Adult Services, Youth Services, and CE Supervisors)
- Roadshows
- Training
- Follow-up at 30 days and six months



Structure and definitions

- Meet Industry Standards
- Clear path to the data
- Defined Purpose for the fields
- Unique data in each field
- Improved Consistency

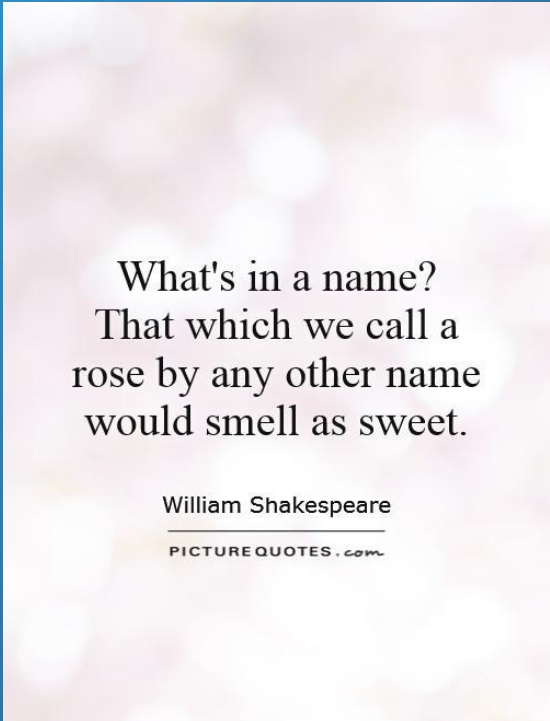


Definitions

- **Collection Code:** Define collections. Consistent, intuitive naming system that allows the collections to be view in their entirety such as DVD and Fiction
- **Statistical Type:** will be used to take a deeper dive into the collection such as genres and Dewey centuries
- **Prefix (Top line of call label):** Name of the audience such as Japanese, YA, and Juvenile
- **Shelf Location:** Branch specific notation of items that are shelved in areas separate from the rest of their collection
- **Material Type:** System defined; allows for narrowing of searching by physical format. Also impacts loan periods and fines.

Note: We will do a clean up of Shelf location and Material Type to remove outdated options.

Collection Names & Shelf Locations



What's in a name?
That which we call a
rose by any other name
would smell as sweet.

William Shakespeare

[PICTUREQUOTES.com](http://picturequotes.com)

Collection Name Changes & Shelf Locations

- **GOALS**

- Increase PCLS customer findability
- Increase staff findability
- Be as intuitive as possible
- Data organized in a way that draws clear
- Clean Up

Collection Change Recommendations

Current Collection Name	Recommended Collection Name	Reason
Talking Book	Audiobook	More intuitive for PCLS customers and staff. Industry standard
Easy	Picture Book	More intuitive for PCLS customers and staff.
Easy Board Book	Boardbook	Distinguishes this collection for other children's collections.
Easy Reader	Reader	Distinguishes this collection for other children's collections.
Large Type	Large Print	Industry standard and the Polaris type of material (which can't be changed) is Large Print.
J Fiction Readalong J Non Fiction Readalong	Readalong	Clear for customers, eliminated confusion regarding easy or juvenile



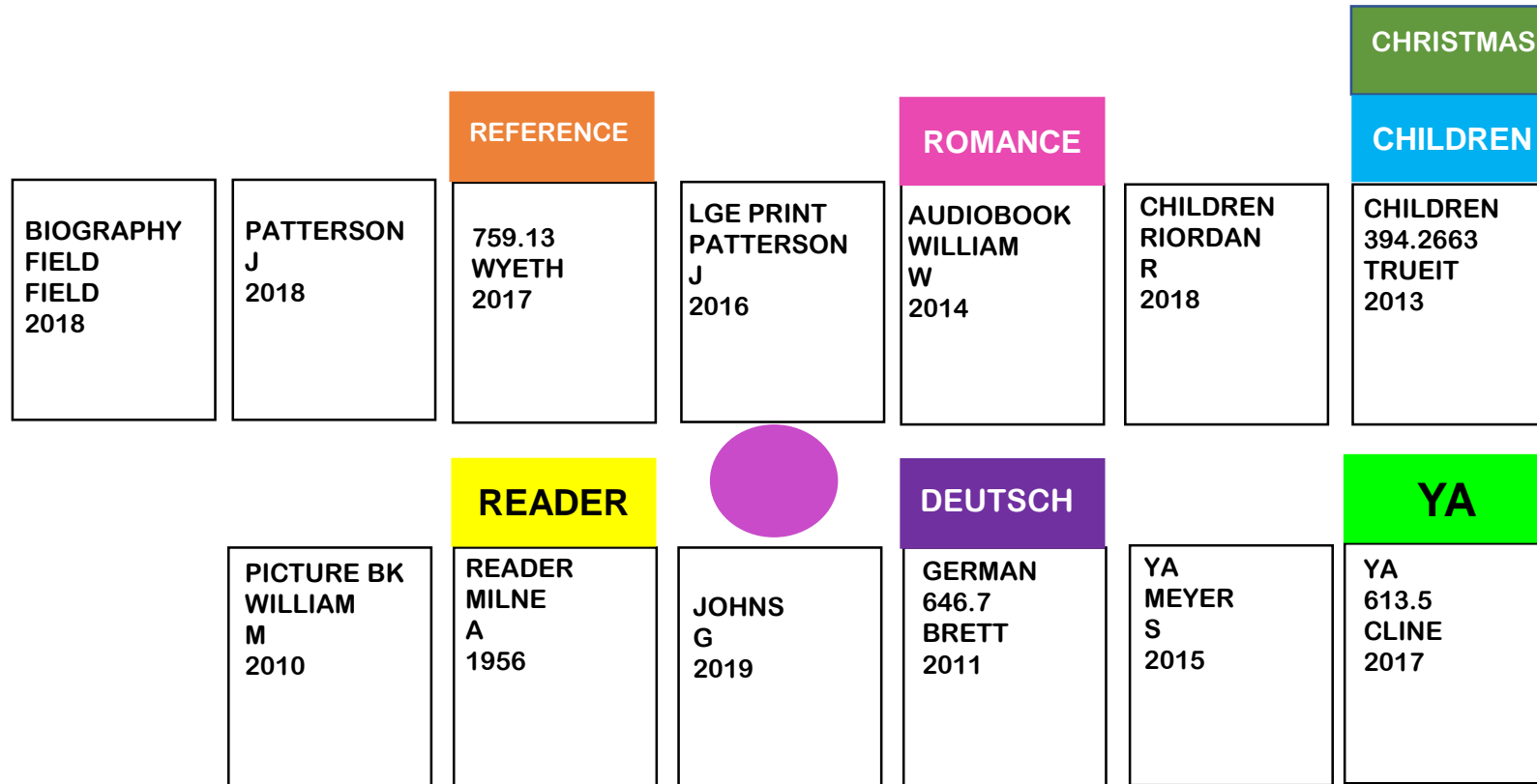
Other Collection Recommendations		
Current Collection	Recommended Change/Questions	Reason
EPB	Change to shelf location instead of collection code with a Statistical Code of EPB.	There isn't enough items to constitute a separate collection, and they will be included in Children's report. Having a stat code will still allow weeding and circulation reports to be run.
JPB	Recommend rolling into Juvenile collection.	Consistent with YA. Can still search to find paperbacks at a material type.
Career and Education Center	Sunset collection code.	No longer used.
International Collection CD- Korean	Sunset.	Not able to obtain – no longer collection. Withdraw remaining items or move to WORLD.
Juvenile NF Large Print	Roll into Juvenile NF	Not enough items for separate collection code. Will still have material type of Large Print.
Juvenile Fairytales	Roll into JNF with shelf location of Fairy Tales and state code of Fairy Tales	Consistent with other collection codes and easier to pull reports. Still findable.
J Reference	Used for 31 titles	Recommendation to review titles.
J Theme Packets	Sunset	No longer used
Non Fic Professional	Sunset	Collection has been rolled into NF
Oversize	Change to shelf location	Will be included in reports for pertinent collection



Labels

- Consistency with wording
- Cover as little of the spine/title as possible
- Readable Font
- Add year to Fiction – recommendation
- Preference given to prefix and class on skinny spines
- Intuitive





How did we make all of these changes?

- Utilized a Test Server and made all changes here first
- Provided new Codes to Innovative for Programming
- Created a series of Crosswalk documents
- Decided who would so which parts of the work

Playing with the Test Server

- Completely separate instance of Polaris
- Make changes without Fear of blowing up the Production server
- Allowed III access to test process



Dividing up the work

Initial Plan

- PCLS would create new Collection and Stat codes
- PCLS would create a mapping document for the changes
- Innovative would map the codes with provided documentation
- Innovative would convert or create new On Order Item template

What Actually Happened....

- PCLS created the Collection codes
- PCLS provided Innovative with the new stat codes; Innovative created them in Polaris
- Innovative mapped the codes
- Innovative created new On Order Item templates

Starting the Mapping Process

A	B
Current Codes	New Codes
DVD COMEDY	DVD
DVD DRAMA	
DVD FAMILY	
DVD FOREIGN	
DVD HOLIDAY	
DVD HORROR	
DVD SCIENCE FICTION	
DVD SPECIAL INTEREST	
DVD SUSPENSE	
DVD FOR THE YOUNGEST	
DVD NONFICTION	DVD NONFICTION
DVDs TO GO	DVD
EARLY LEARNING	EARLY LEARNING
EASY	PICTURE BOOK
EASY BOARD/SMALL	BOARD BOOK
EASY NON-FICTION	PICTURE BOOK NONFICTION

A	B
Current Stat Code	Proposed Stat Code
VIDEO SUSPENSE	Remove
YA FICTION	YA FICTION
	YA FICTION CLASSICS
	YA FICTION FANTASY
	YA FICTION HISTORICAL
	YA FICTION HORROR
	YA FICTION MYSTERY
	YA FICTION SCIENCE FICTION
YA FICTION CHRISTIAN	
YA GRAPHIC NONFIC	Remove
YA GRAPHIC NOVEL	YA GRAPHIC NOVEL
YA NON FICTION	YA NON-FICTION - 000-099
	YA NON-FICTION - 100-199
	YA NON-FICTION - 200-299
	YA NON-FICTION - 300-399
	YA NON-FICTION - 400-499
	YA NON-FICTION - 500-599
	YA NON-FICTION - 600-699
	YA NON-FICTION - 700-799
	YA NON-FICTION - 800-899
YA NON-FICTION - 900-999	
YA PAPERBACK	Remove

Round 2 through 17ish

	A	B	C	D	E	F	G	H	I	J	K
	ExistingCollection	ExistingMatType	ExistingStatCode	ExistingCallGroup	Split	TargetCollection	TargetMatCode	TargetStatCode	ShelfLocation	LibOrIII	Notes
2	BABY BOOKS TO GO	Book	JUV THEME PACKET			BABY BOOKS TO GO	Book	CHILD THEME PACKET			
3	BABYTIME	Book	J STORY TELLING			BABYTIME	Book	CHILD STORY TELLING			
4	BIOGRAPHY	Book	BIOGRAPHY			BIOGRAPHY	Book	BIOGRAPHY			
5	BOOK CLUB KIT	Book	FICTION			BOOK CLUB KIT	Book	BOOK CLUB KIT			
6	CD BLUES/SOUL	CD	CD BLUES/SOUL			CD	CD	CD BLUES/SOUL			
7	CD CLASSICAL	CD	CD CLASSICAL			CD	CD	CD CLASSICAL			
8	CD CHILDREN	CD	CD CHILDREN			CD CHILDREN	CD	CD CHILDREN			
9	CD COUNTRY	CD	CD COUNTRY			CD	CD	CD COUNTRY			
10	CD FOLK	CD	CD FOLK			CD	CD	CD FOLK			
11	CD HOLIDAY	CD	CD HOLIDAY			CD	CD	CD HOLIDAY			
12	CD HUMOR	CD	CD HUMOR			CD	CD	CD HUMOR			
13	CD JAZZ	CD	CD JAZZ			CD	CD	CD JAZZ			
14	CD LATIN	CD	CD LATIN			CD	CD	CD LATIN			
15	CD MISCELLANEOUS	CD	CD OTHER			CD	CD	CD MISC			
16	CD MUSICALS/FILMS	CD	CD MUS/FILMS			CD	CD	CD MUSICALS/FILMS			
17	CD NEW AGE	CD	CD NEW AGE			CD	CD	CD NEW AGE			
18	CD OPERA	CD	CD OTHER			CD	CD	CD OPERA			
19	CD POPULAR	CD	CD POPULAR			CD	CD	CD POPULAR			
20	CD RAP/HIP HOP	CD	CD RAP/HIP HOP			CD	CD	CD RAP/HIP HOP			
21	CD ROCK	CD	CD ROCK			CD	CD	CD ROCK			
22	CD SACRED	CD	CD SACRED			CD	CD	CD SACRED			
23	CD VOCAL/ EASY LISTENING	CD	CD VOCAL EASY			CD	CD	CD VOCAL/EASY			
24	CD WORLD MUSIC	CD	CD WORLD MUSIC			CD	CD	CD WORLD MUSIC			
25	DEVICE	DEVICE	(NONE)			DEVICE	DEVICE	DEVICE			
26	DVD FOR THE YOUNGEST	DVD	DVD FOR THE YOUNGEST			DVD FOR THE YOUNGEST	DVD	DVD FOR THE YOUNGEST			
27	DVD ACTION	DVD	DVD ACTION			DVD	DVD	DVD ACTION			

Process Changes and more Mapping

- Used the project to change processes
 - Utilizing \$h in 970 tags
 - Defined subfields in 092 field to map to Item records
 - Cleaned up Material Types and shelf locations



New On Order Templates

TemplateName	TemplateOwner	Non-Circulating	DisplayinPAC	Owner
On Order *ABIO Biography	(Same as Branch in Template name)	Blank	Checked	Administrative Center Library
On Order *CDCHI Children's CD	(Same as Branch in Template name)	Blank	Checked	(Same as Branch in Template name)
On Order *CDBLU Blues/Soul CD	(Same as Branch in Template name)	Blank	Checked	(Same as Branch in Template name)
On Order *CDCLA Classical CD	(Same as Branch in Template name)	Blank	Checked	(Same as Branch in Template name)
On Order *CDCOU Country CD	(Same as Branch in Template name)	Blank	Checked	(Same as Branch in Template name)

Defining Subfields in 092

- Implemented to decrease customer confusion and speedup data entry
- Help to reduce errors between Bibliographic and Item records



2020

1. You are an awesome woman : affirmations and inspired ideas for self-care, success and a truly happy life

by Anderson, Becca, author.

Description: 197 pages : illustrations ; 18 cm
Publisher, Date: Coral Gables, FL : Mango Publishing Group, a division of Mango Media Inc., [2020]

System Availability: 2 (of 4)

Call Number: 158.1082 ANDERSO 2020

Current Holds: 0

<input checked="" type="checkbox"/>	AVAILABILITY BY BRANCH
<input type="checkbox"/>	FULL DISPLAY
<input type="checkbox"/>	PLACE HOLD

Add to My List



#IUG2020



MARC Validation Editor - Bibliographic - Pierce County Library System

MARC Fields

Current tag: 092

Go to tag:



Tag	Ind1	Ind2	Subfield	MARC Name	Required	Validate	Repeat	Obsolete
+ 083				Additional Dewey De		Yes	Yes	
+ 084				Other Classification M		Yes	Yes	
+ 085				Synthesized Classifica		Yes	Yes	
+ 086				Government Docume		Yes	Yes	
+ 088				Report Number		Yes	Yes	
- 092				Local tag		Yes	Yes	
	#			Local indicator one				
		#		Local indicator two				
			a	Local subfield				
			b	Local subfield				
			e	Local subfield				
			f	Local subfield				
			2	Local subfield				
+ 100				Main Entry--Personal		Yes		
+ 110				Main Entry--Corporat		Yes		
+ 111				Main Entry--Meeting		Yes		
+ 130				Main Entry--Uniform		Yes		
+ 210				Abbreviated Title		Yes	Yes	
+ 222				Key Title		Yes	Yes	
+ 240				Uniform Title		Yes		
+ 242				Translation of Title b		Yes	Yes	
+ 243				Collective Uniform Ti		Yes		
+ 245				Title Statement	Yes	Yes		
+ 246				Varying Form of Title		Yes	Yes	
+ 247				Former Title		Yes	Yes	
+ 250				Edition Statement		Yes	Yes	
+ 254				Musical Presentation		Yes		

Done

Item Create Call Number Hierarchy

Organization	Pr...	Scheme	Tag	Prefix	Classification	Cutter	Suffix	Vo...	C...
ACL Closed Stacks	1	Dewey Decimal	92	f	a	b	e		
ACL Closed Stacks	2	Dewey Decimal	984		c	b			
Administrative Cent...	1	Dewey Decimal	92	f	a	b	e		
Administrative Cent...	2	Dewey Decimal	984		c	b			
Anderson Island	1	Dewey Decimal	92	f	a	b	e		
Anderson Island	2	Dewey Decimal	984		c	b			
Bonney Lake Library	1	Dewey Decimal	92	f	a	b	e		
Bonney Lake Library	2	Dewey Decimal	984		c	b			
Buckley Library	1	Dewey Decimal	92	f	a	b	e		
Buckley Library	2	Dewey Decimal	984		c	b			
DuPont Library	1	Dewey Decimal	92	f	a	b	e		
DuPont Library	2	Dewey Decimal	984		c	b			
Eatonville Library	1	Dewey Decimal	92	f	a	b	e		
Eatonville Library	2	Dewey Decimal	984		c	b			
Gig Harbor Library	1	Dewey Decimal	92	f	a	b	e		

47 row(s)

Benefits of mapping 092

- Faster data Entry
- Reduced typos in call number
- Reduced customer confusion for call numbers

Item Record Bulk Change - Number of records: 4

Location Circulation Call Number Notes/Blocks Misc Report/Record Set

Shelving scheme: [dropdown]

Call number prefix: [text box]

Classification number: [text box]

Cutter number: [text box]

Call number suffix: [text box]

Volume number: [text box]

Copy number: [text box]

Use call number fields from bib record

OK Cancel Help

Cleaning up the rest

- Changed Material Types
- Cleaned up Shelf locations
- Worked through errors in mapping



Reports

- User stories for what staff needed
- Can now pull data at a higher collection level of by more granular genre/Dewey century level
- Tweaked several reports
- PLDS was waaaaayyyy easier



Follow-UP

- 30 day follow-up
 - Didn't make major changes
- 6 month – ish follow up with survey to staff
 - Mixed reviews
 - Most feedback around lables

Questions?

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