


Circulation Parameters

or
How I Learned to Rule my Loan Rules

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EGL-IUG 2006 Toledo
20 October 10 a.m.



Topics

- Circulation Parameters
 - Codes
 - Tables
- Loan Rules
- Loan Rule Determiner Table
- Watch out!!

Circulation Parameters

- Patron Record Codes
 - Patron Type (PTYPE)
 - Numeric up to 256 values
 - PCODE1, PCODE2
 - 32-value alphanumeric
 - PCODE3, PCODE 4
 - Numeric up to 256 values

Circulation Parameters

- Item Record Codes
 - Item Type (ITYPE)
 - Numeric up to 256 values
 - Set by cataloging of material
 - Item (Branch) Location
 - Also set by our friends the catalogers



Label	Code
Undergrad Students	0
Honors Students	1
Graduate Students	2
University Staff	3
University Faculty	4
University Administration	5
JCU Alumni	6
Friends of the Library	7
High School Student	8
Special Borrowers	9
Inferiary Loan	10
Part Time Faculty	11
Retired Faculty	12
PCirc ONLY People	13
Guest Scholars	14
Library Admin	15
Library Staff	16
Library Faculty	17
	18
	19

Label	Code
book	0
serial	1
gov. doc.	2
serial gov. doc.	3
computer software	4
video recording	5
audio cd	6
audio cassette	7
	8
thesis	9
artwork	10
map	11
microfilm	12
microfiche	13
microcard	14
periodical	15
annual report	16
slides	17
kit	18
CRserve ARTICLE	19
CRserve Personal Material	20
cover collection	21
incubation collection	22

Circulation Parameters

What can codes do for you?

- PTYPE, ITYPE along with Item Location used to select a loan rule for a circulation transaction
- Use to gather statistics
- Group records in Create Lists

Circulation Parameters

- Tables
 - Hours Open
 - Important if you have hourly checkouts
 - Days Closed
 - Important to determine due dates and fines
 - Patron Blocks Table
 - Loan Rules
 - Loan Rule Determiner
 - Spend lots of time getting to know the last two!!!!

Location	Day	Open	Closed
1	?????	sun	1100 2400
2	?????	mon	730 2400
3	?????	tue	730 2400
4	?????	wed	730 2400
5	?????	thu	730 2400
6	?????	fri	730 2400
7	?????	sat	1000 1800
8	?????	sun	1100 2330
9	?????	mon	730 2330
10	?????	tue	730 2330
11	?????	wed	730 2330
12	?????	thu	730 2330
13	?????	fri	730 2330
14	?????	sat	1000 1730
15	?????	09:04	1100 2200
16	?????	10:13	730 2200
17	?????	10:14	730 1900
18	?????	11:22	730 1800
19	?????	11:23	730 1700
20	?????	11:26	1000 1600
21	?????	11:26	1100 1800
22	?????	12:11	1100 2600
23	?????	12:12	730 2600
24	?????	12:13	730 2600
25	?????	12:14	730 2600
26	?????	12:15	730 2600
27	?????	12:16	730 1600
28	?????	12:19	800 1700
29	?????	12:20	800 1700
30	?????	12:21	800 1700

Location	Day Closed
1	0101
2	0102
3	0107
4	0108
5	0114
6	0115
7	0116
8	0305
9	0414
10	0415
11	0416
12	0514
13	0529
14	0529
15	0614
16	0611
17	0610
18	0625
19	0702
20	0704
21	0709
22	0716
23	0723
24	0730
25	0807
26	0814
27	0821
28	0827
29	0828
30	0905

Patron Type	Patron Agency	Patron Exp. Date	Max Owed	Highest Level Oduans	Max Items	Max Holds	Max ILL (at one time)	Max ILL (per interval)	Max RemA	Max RemB	Max RemC	Max RemD	Highest Number Odue Points	Block Days
1	0	999			0	999			0	999			0	0
2	1	999			0	999			0	999			0	0
3	2	999			0	999			0	999			0	0
4	3	999			0	999			0	999			0	0
5	4	999			0	999			0	999			0	0
6	5	999			0	999			0	999			0	0
7	6	999			0	999			0	999			0	0
8	7	999			0	999			0	999			0	0
9	8	999			0	999			0	999			0	0
10	9	999			0	999			0	999			0	0
11	10	999			0	999			0	999			0	0
12	11	999			0	999			0	999			0	0
13	12	999			0	999			0	999			0	0
14	13	999			0	999			0	999			0	0
15	14	999			0	999			0	999			0	0
16	200	999			0	999			0	999			0	0
17	201	999			0	999			0	999			0	0
18	202	999			0	999			0	999			0	0
19	203	999			0	999			0	999			0	0
20	204	999			0	999			0	999			0	0
21	205	999			0	999			0	999			0	0
22	206	999			0	999			0	999			0	0
23	210	999			0	999			0	999			0	0
24	211	999			0	999			0	999			0	0
25	212	999			0	999			0	999			0	0
26	213	999			0	999			0	999			0	0
27	214	999			0	999			0	999			0	0
28	215	999			0	999			0	999			0	0
29	216	999			0	999			0	999			0	0

Loan Rules

- Loan rule controls all aspects of managing a particular loan to a patron, including fines and notices
 - Loan variables
 - Recall variables
 - Overdue variables
 - Fine variables

[Sample Loan Rule](#)

Loan Rule Determiner Table

- Selects which loan rule to use for each checkout
- System searches from bottom to top and selects first match—ORDER IMPORTANT
- Always have a default non-circulating entry as first item to catch omissions from the table

Loan Rule Determiner

Location	Patron Type	Item Type	Age Range	Rule Number	Active
1	?????	999	999	1	Y
2	?????	999	9	1	Y
3	[svd]	999	999	4	Y
4	[rdrf]	999	999	1	Y
5	?????	3,4,5,11	999	15	Y
6	?????	4,5,11,12	0-3,9,29,63-64	8	Y
7	?????	999	19,20,	4	Y
8	?????	1,2	0-3,9,29,63-64	9	Y
9	?????	999	4	11	Y
24	?????	200,205,212,217	6,27	6	Y
25	[pou]	4,5,11	1,3,15	10	Y
26	?????	0-999	17,47,48	11	Y
27	?????	200-217	17,47,48	1	Y
28	?????	0,2,6,9,14	6,7,21	3	Y
29	?????	0,6-9,14	0,3,9,29,63-64	2	Y
30	?????	3	0,3,9,29,63-64	12	Y

010377517

AUTHOR Newman, Judie.
 TITLE The ballistics hand : postcolonial fictions / Judie Newman.
 CALL # PR0004 .N49
 LOCATIONS Hly

Summary | Record #10418611 | 0 Item-Level Holds | 0 Bib-Level Holds

#10418611 Last Updated: 06-16-2006 Created: 02-10-1998 Revisions: 16

COPY #	1	LOTRIN	12-14-2003	LOCATION	Hly
ICODE1	0	BINDA	-	LOANBLE	2
ICODE2	-	#RENEWAL S	0	STATUS	0
ITYPE	0	#OVERDUE	2	INTL USE	0
PRICE	50.00	ODUE DATE	05-16-2006	COPY USE	0
OUT DATE	03-28-2006 09:46PM	REF USE	0	MESSAGE	
DUE DATE	04-25-2006	RECAL DATE	-	OPACMSG	-
PATRON#	1022180	TOT CHECKOUT	3	YDCIRC	0
LPATRON	1020197	TOT RENEW	0	LYCRC	0

a 952 01010180118801199795.c000.p0004.N49.p.c.1
 0118801199795

Notice Parameters

- Notices
 - Text of Circulation Notices
 - This doesn't control circulation, but is referenced by the loan rules.
 - Email Subject Table
 - Good customer service

Watch Out!

- Table order of entries important
 - Loan Rule Determiner—Reads Bottom to Top
 - Days Closed—Bottom to Top
 - Hours Open—Bottom to Top AND
- Just to Confuse You
 - Patron Blocks—Top to Bottom

Watch Out!

- Be careful when you delete any codes or table entries
- NEVER** delete an entry in the Loan Rule Table (except the very last one)
 - This is the quickest way to get the Circulation staff annoyed with you!
 - Make it 'inactive' or rename it 'unused'

Watch Out!

- Watch out when increasing the number of notices in a loan rule. Best to start a new loan rule.
- Always check to see that a code is truly unused before deleting it.

Where to look for help

- CSDirect (You'll need Password)
 - "Introduction to Circulation Parameters"
 - <http://csdirect.iii.com/documentation/cir/introcircparam.shtml>
 - "Circulation Parameters: What You Need to Know Before You Make Changes"
 - <http://csdirect.iii.com/documentation/cir/circtroubleshooter.shtml>

Where to Look for Help

- Innovative Guide and Reference
 - Circulation Parameters
 - Page #105401

Where to Look for Help

- Innovative Guide and Reference
 - Codes
 - Patron Types (PTYPE)
 - page #106044
 - Item Types (ITYPE)
 - page #106052
 - Item (Branch) Location
 - page #103428

Where to Look for Help

- Innovative Guide and Reference
 - Tables
 - Loan Rules
 - Page#105408
 - Loan Rule Determiner Table
 - Page #105407
 - Patron Blocks Table
 - Page #103426

Where to Look for Help

- Innovative Guide and Reference
 - Tables
 - Hours Open
 - Page #105406
 - Days Closed
 - Page #105403
 - Text of Circulation Notices
 - Page #105409
 - Email Subject
 - Page #105793

Thank You

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Link to this presentation
http://www.jcu.edu/library/leggiero/circulation_parameters.ppt