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# Streamlining a Focused Collection: I-Types, Loan Rules, ICODE1 Fields and Much More

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# Streamlining a Focused Collection

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- In 2008, UCL moved our circulating multimedia equipment collection from our Student Technology Resource Center to our then Circulation Services Department.
- After two years of data collection and analysis of usage trends, the Dean and University Librarian charged a working group to assess, streamline and revise the collection, the lending policies and all procedures and documentation relating to equipment. The Dean's stated goal was to have the library more in line with ITIE (Information Technology and Instructional Equipment ) guidelines and curricular support.



# Streamlining a Focused Collection

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## Initial discussion points:

- Casual observations of usage
  - Historical circulation data
  - Equipment viability
  - Student expectations – expressed and otherwise
  - ITIE guidelines
  - Library leadership expectations
- The working group included management from Circulation & Multimedia Services, members of library administration, Library IT and the library business office.
  - The working group first studied equipment lending at other institutions, both peer and those with unique/interesting equipment lending situations. (Webpac booking, funding, staffing, etc.)



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After research and analysis, the group addressed the collection itself and focused on streamlining. Many miscellaneous pieces were decommissioned. Other parts were expanded. For example, large speaker systems were removed and the amount of data projectors was increased.

Also, the intended user groups were identified and addressed. Staff and summer program students were removed from the pool of borrowers. Departments across campus were informed of the changes. Promotional materials were created to notify the student population.

The group also addressed the equipment borrowing contract and the policies/procedures for outstanding overdue materials. The result was clear procedures for lost/billed/long overdue items. (UC Asset Management.)



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- Next were the necessary technical changes.
- Cleaning up itypes.
- Cleaning up the loan rules and the loan determiner table.
- Employing ICODE1 field for statistics.

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Went from forty plus itypes to three:

- 5day bookable equipment
- 4hr equipment
- 5day limit one equipment

This changed improved the functionality of the 5 day loan rule in the determiner table and facilitated use of the MaxItem fields for the patron type. The MaxItem fields enable ptype specific circ limitations or specifications.

MaxItemA				
ulabk				
LIMIT OF 6 PER PATRON				
MaxItemB				
itype 152				
Limit one per patron				

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- Changes to the loan rule determiner table.

rule	location	ptype	itype	loan rule	active	NOTES
448	ulabk	0-7,27,28	100,101,103-141	68	Y	5 day renew
449	ulabk	0-7,27,28	55	70	Y	
450	?????	0-7,27,28	102,128	54	Y	
451	?????	9	999	13	Y	
452	ulabc	0-7,27,28	102	71	Y	
453	ulabk	0-15,17-23,25-255	27	44	Y	
454	ulabk	0-7,27,28	102	71	Y	
455	ulabk	25,26	999	1	Y	

Old

	Location	Ptype	Itype	Rule Number	Active
462	ulabk	0-6	150,152	68	Y
463	ulabk	0-7,27,28	55	70	N
466	ulabc	0-3	102	71	Y
467	ulabk	0-15,17-23,25-255	151	44	Y
469	ulabk	7-8,15,25-28	999	1	Y

New.  
Much  
simplified.

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Use the ICODE1 to track individual item stats.

ICODE1	Code name		
100	Calculator Graphing		
101	Calculator Scientific		
102	Camcorder Cables & Remote		
103	Camcorder digital (bloggie flip)		
104	Camcorder Mini-DV		
105	Camera Digital		
106	Cart with 2 wheels		
107	Data Projector		
108	Data Projector Adaptor for Mac		
109	Digital Audio Recorder		
110	Digital Audio Recorder Professional		
111	DVD Player		
112	Extension Cord Multi-outlet		
113	Firewire 4pin to 6pin		
114	Firewire 4pin to 9pin for Mac		
115	Green Screen		
116	Hard Drive Portable		
117	Headphones		
118	Laptop		
119	Microphone Boom Pole		
120	Microphone Shotgun		
121	Microphone Stand		
122	Microphone Wired		
123	Microphone Wireless Clip On		
124	Microphone Wireless Handheld		
125	Microphone Wireless Handheld for Camcorder		
126	Microphone Tabletop Stand		
127	Mixing Board		
128	Pen Tablet accessories for STRC		



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The ICODE1 field enables us to gather stats on equipment in this fashion without employing numerous itypes and loan rules.

			Patron Type								TOTAL by item
			ESL	Faculty	Faculty Affiliate	Grad Student	Law Student	NH Undergrad	Staff	Undergrad	
Equipment Item Name	ICODE1										
Calculator Graphing	100		0	0	0	10	0	3	0	139	152
Calculator Scientific	101		0	0	0	13	0	0	0	128	141
Camcorder Cables & Remote	102		0	9	0	2	0	0	0	3	14
Camcorder digital (bloggie flip)	103		0	3	0	65	0	1	9	122	200
Camcorder Mini-DV	104		0	41	0	159	0	9	11	515	735
Camera Digital	105		0	17	0	121	0	8	39	167	352
Cart with 2 wheels	106		0	5	0	8	0	0	2	12	27
Data Projector	107		0	88	0	637	1	0	9	488	1223
Data Projector Adaptor for Mac	108		0	4	0	69	1	0	0	84	158
Digital Audio Recorder	109		0	14	0	83	0	5	34	161	297
Digital Audio Recorder Professional	110		0	1	0	18	0	0	1	14	34



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Outcomes and ongoing efforts.

Questions?

Thank you.

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