Shrink your Sierra System

LEIGH DUNCAN, WRIGHT STATE UNIVERSITY
OH-IUG 2019
About Our Sierra System

Wright State University Libraries – Main Campus and Lake Campus

College of Education Resource Center

Kettering College

Dayton-area hospitals
  ◦ Dayton Children’s Hospital
  ◦ Kettering Medical Center
  ◦ Grandview Medical Center
  ◦ Miami Valley Hospital
  ◦ VA Medical Center
Sierra Administration

Sierra Admin App

Admin Corner

Sierra Desktop App

ASAA
Sierra Services

- Circulation Materials
- Reserving/Booking Library Materials
- Authentication Source
- Print Book/Journal Acquisitions
- Serials Check-in
- Catalog
- E-Resource Management
- and more . . .
Why?
Usage Trends

Sierra Services

Other Services

springshare

EBSCO

bepress

kanopy
How?
#1 - (Branch) Location Codes
(Branch) Location Codes

1. Function=Statistics
2. Run a fixed-field report for item records
3. Look at the Record Count column; any locations with a low number (<10) are possible candidates for deletion
   Note: *codes that are used zero times will not display in the report; compare your Branches table to the report to find locations not currently used in item records*
4. Run fixed-field reports for bib and all other attached records; look for the branch codes you identified as possible candidates for deletion
5. Consult with stakeholders and determine which codes to delete
(Branch) Location Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Meaning</th>
<th>Record Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>02100</td>
<td>Kettering College</td>
<td>27642</td>
</tr>
<tr>
<td>02101</td>
<td>Kettering College Audio Visual</td>
<td>4522</td>
</tr>
<tr>
<td>02103</td>
<td>Kettering College Reserve</td>
<td>645</td>
</tr>
<tr>
<td>02104</td>
<td>Kettering College Reserve</td>
<td>38</td>
</tr>
<tr>
<td>02105</td>
<td>Kettering College Reserve</td>
<td>94</td>
</tr>
<tr>
<td>02106</td>
<td>Kettering College Reserve</td>
<td>19</td>
</tr>
<tr>
<td>02107</td>
<td>Kettering College Reserve</td>
<td>2</td>
</tr>
</tbody>
</table>
(Branch) Location Codes

*Review relevant documentation before deleting any codes*

Branch codes are used in other areas of the system, including:

• Scoping
• Locations Served
• Hold Pickup Locations
• Days Closed/Hours Open
• Loan Rule Determiner
• Link Maintenance
• System Options
• Record Templates
• and more . . .

Delete Branch codes from all other areas of the system first; the Branches table should be the last place you delete the code.
(Branch) Location Codes

22% reduction
#2 - Catalog Scopes
Catalog Scopes

1. If you use Google Analytics, review rudimentary scope usage statistics
2. Work with stakeholders to determine which scopes to delete
3. Work with III to remove locations from scopes
4. Reorder remaining scopes, as needed
Catalog Scopes

17% reduction
#3 – Patron Types
Patron Types

1. Function=Statistics

2. Run a cross-tab report on patron records, looking at the ptype and home library fields

3. Choose the Record Count report and look for any ptypes with a low number in the Total column
   
   *Note: Again, ptypes with zero uses will not display; compare your Patron Types table with the statistical report to identify any ptypes not in use*

4. Consult with stakeholders to determine which codes can be deleted
Patron Types

Patron Types are used in other areas of the system, including:

• Patron Blocks
• Loan Rule Determiner
• System Options
• Record Templates
• WWWOptions

*Work with OhioLINK to update your patron type mapping with central.
Patron Types

30% reduction
Warning:

“Do not delete, reorder, or insert entries in the Loan Rules table. The system identifies loan rules by their numerical position in the Loan Rules table. Changing the order of entries in the table causes the system to apply the wrong loan rule parameters system-wide. You can append new entries to the end of the table or reuse entries that are not currently used to circulate items.”

--Sierra Web Help manual
Loan Rules

1. Open the Loan Rule Determiner table
2. Sort by the Loan Rule column
3. Note any loan rules numbers not in use (e.g. if you see entries for loan rules 1,2,3,5 then you know loan rule #4 is not currently being used)
4. Go to Function=Create Lists and create an item record list looking for any of your unused loan rule numbers in the Loan Rule field
5. If the loan rule is not being held in the Loan Rule field of the item record, it is a candidate for “removal”
Loan Rules

OK TO REUSE

• If the loan rule is not being used for current circulation AND is it not being used in the Loan Rule field in any item records, change the name of that rule to something like OK TO REUSE

DO NOT DELETE

• If the loan rule is not being used for current circulation, but it is being used in the Loan Rule field of item records, change the name of that rule to something like DO NOT DELETE or DO NOT REUSE
Loan Rules

This part of the project is currently in-process. Anticipated statistics are:

14% reduction

# of Active Loan Rules

Before | After
--- | ---
118 | 101

14% reduction
#5 – Item Types
Item Types

1. Function=Statistics
2. Run a cross-tab report on item records looking at the item type and location fields
3. Choose the Record Count report and look for any item types with a low number in the Total column
   Note: Item types with zero uses will not display in the report; compare your Items Types table to the report to find those codes not in use
4. Consult with stakeholders to determine which item types to delete
Item Types

Item types are used in a variety of areas throughout the system, including:

- Loan Rule Determiner table
- Record Templates
- ASAA functions (e.g. Rules for Requesting and more)
- System Options

Delete Item Types from all other areas of the system first; the Item Types table should be the last place you delete the codes.
Item Types

# of Item Types

<table>
<thead>
<tr>
<th></th>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>79</td>
<td>71</td>
</tr>
</tbody>
</table>

10% reduction
#6 - Fixed-Length Fields

1. Closely examine the field options the fixed fields in each record type
2. Run fixed-field statistical reports for each record type and look for unused or little-used codes
3. Work with stakeholders to determine which field options to delete
Fixed Fields

Examples:

• CODE1 – we use the Order CODE1 to denote which specific librarian selected the item for purchase. People come and go so this field requires continual maintenance to make information relevant.

• PCODE2 – we use Patron PCODE2 for our hospital libraries, to link patrons to their work department.

• Other fixed fields we updated: Item Status, Order Type, Order Format, and more.
Serials Units

1. Requires working with III Sales, as well as III Tech Support because maintenance is paid on serials units

2. Requires a lot of preparatory work to ensure checkin records and relevant codes are deleted, login accounts are updated, and options groups are updated prior to removing the units

3. What else is on your product list that isn’t being used?
Caveat

**These instructions are based on my experience with our Sierra system**

**Consult the Sierra Web Help manual before making system changes**
What’s Next?

For me: Options Groups

What maintenance projects have you done?
What sort of maintenance do you do on a regular basis?
What is on your “I’d love to shrink that table” wish list?
Questions/Comments?

Leigh Duncan  
Head of Library Technology Services  
Wright State University Libraries

leigh.duncan@wright.edu

(937) 775-2570

Selected Works: https://works.bepress.com/leigh_duncan/