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

Select Report

- COPY #
- ICODE1
- DISPLAY
- I TYPE
- OUT LOC
- IN LOC
- **LOCATION**
- LOANRULE
- STATUS
- IMESSAGE
- OPACMSG
- All Fields

Wright State University Libraries
Report for the fixed fields - item
Range = i1000000-4684586
1387332 records were processed. (2297255 records had been deleted.)

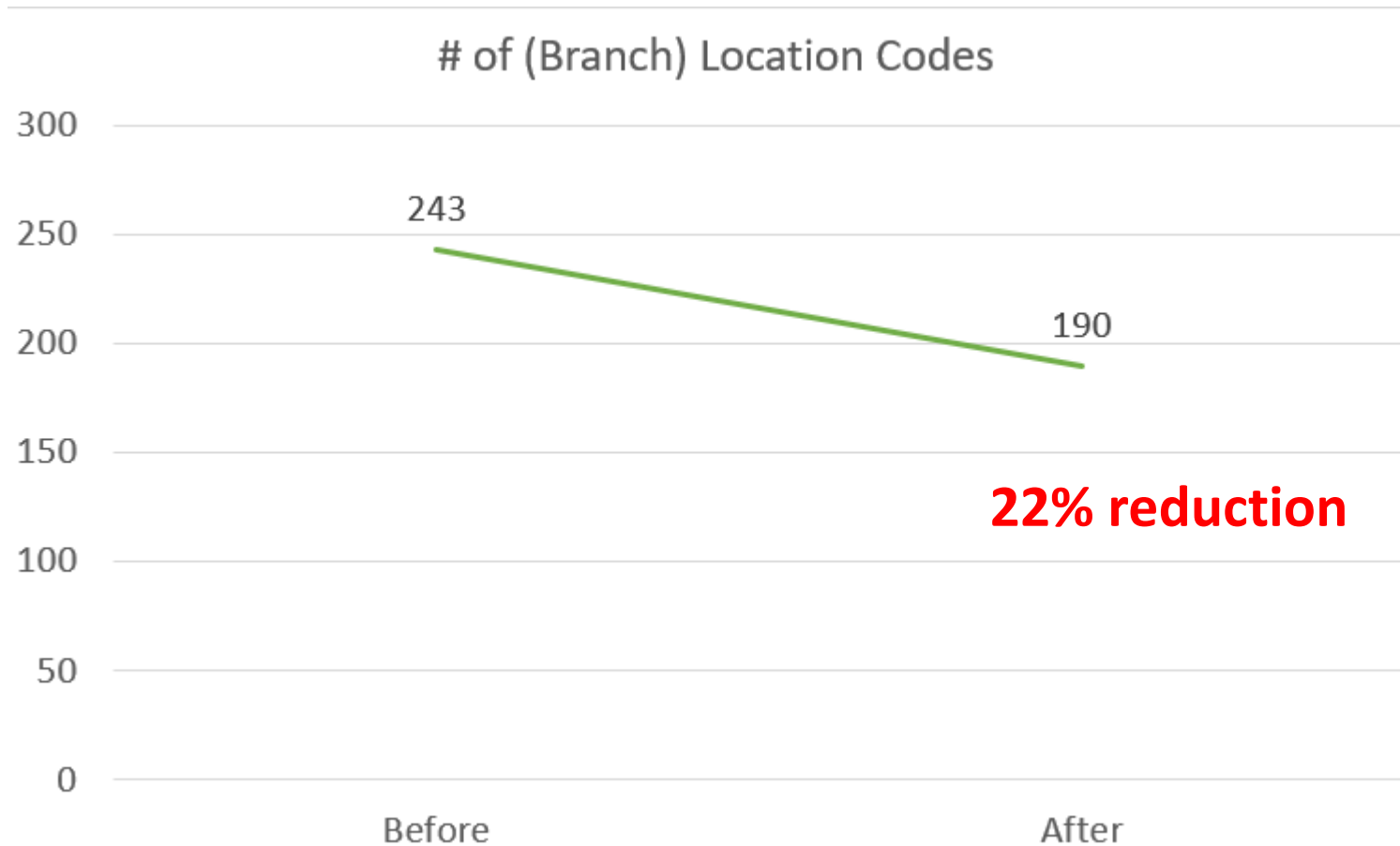| Code	Meaning	Record C...
02100	Kettering College	27642
02101	Kettering College Audio Visual	4522
02103	Kettering College Reserve	645
02104	Kettering College Reserve	38
02105	Kettering College Reserve	94
02106	Kettering College Reserve	19
02107	Kettering College Reserve	2

(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

of (Branch) Location Codes

243

190

22% reduction

Before   After

#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

of Scopes

25

23

20

19

15

17% reduction

10

5

0

Before   After
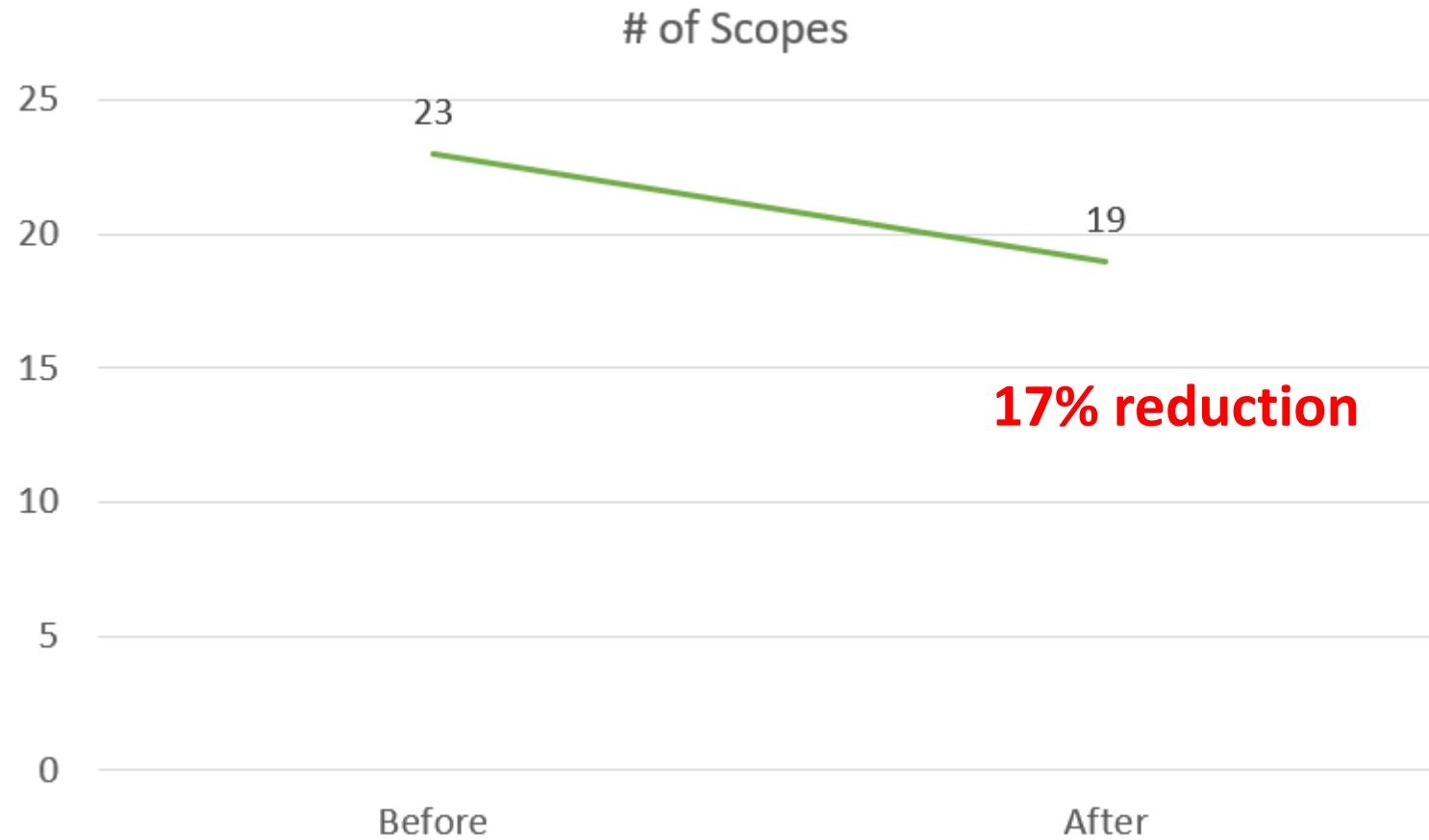
#3 – Patron Types

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.

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

Patron Types

# of Patron Types

35
30
25
20
15
10
5
0

32

23

30% reduction

Before   After
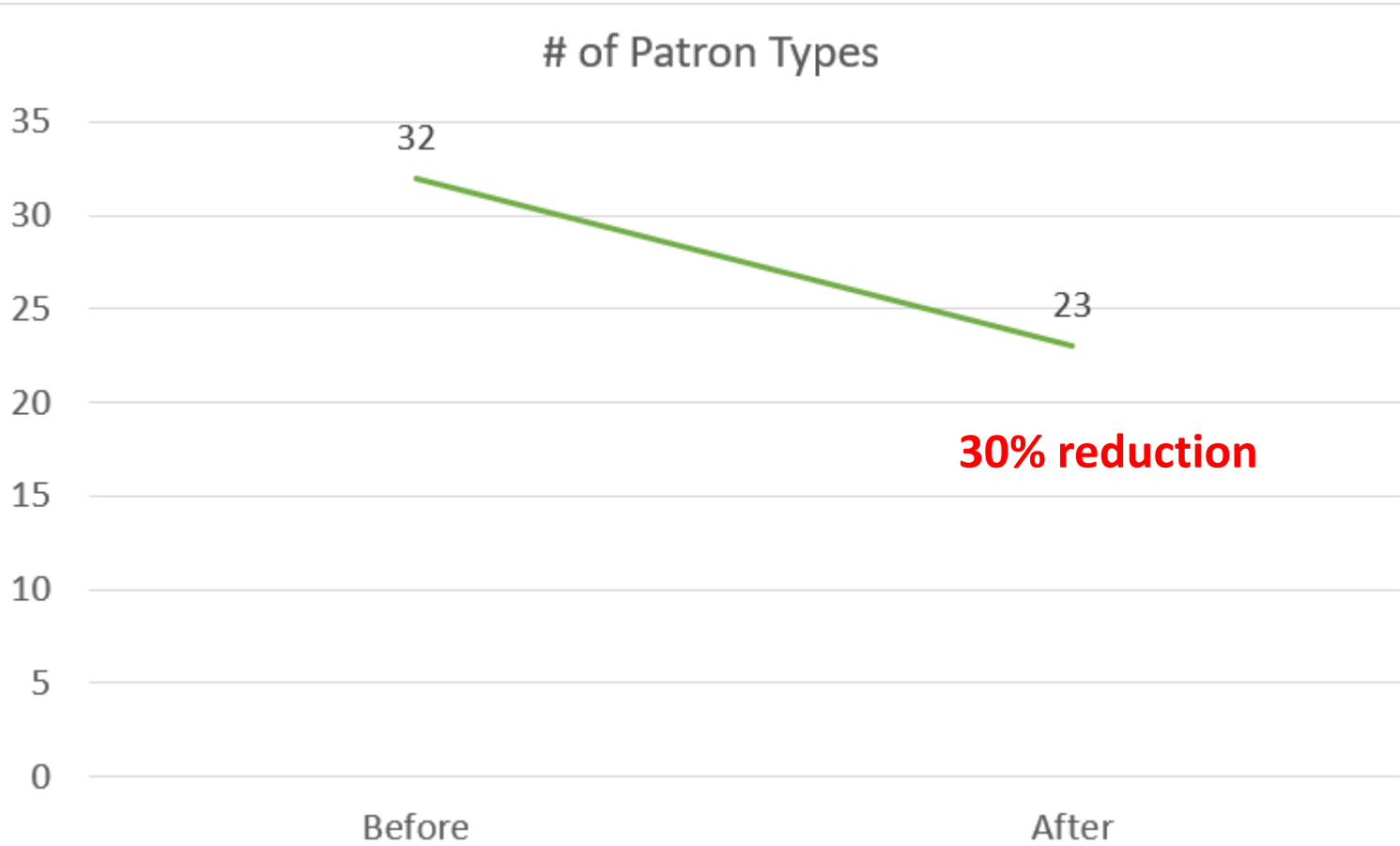
#4 - Loan Rules

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

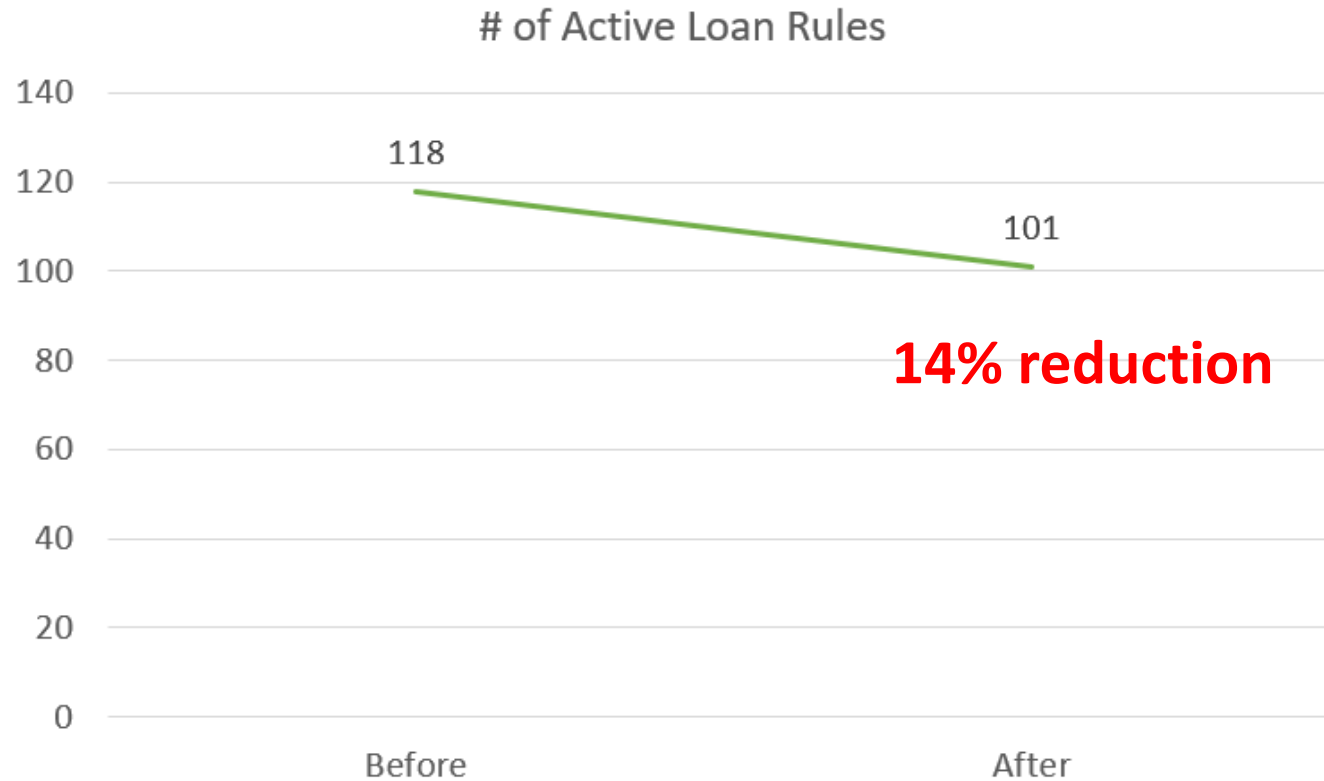- If the loan rule is not being used for current circulation AND is it not being used in the Loan Rule field in any item records, change the name of that rule to something like OK TO REUSE

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:

of Active Loan Rules

14% reduction

	Before	After
	118	101

(Chart: line decreasing from 118 (Before) to 101 (After), y-axis from 0 to 140)

#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

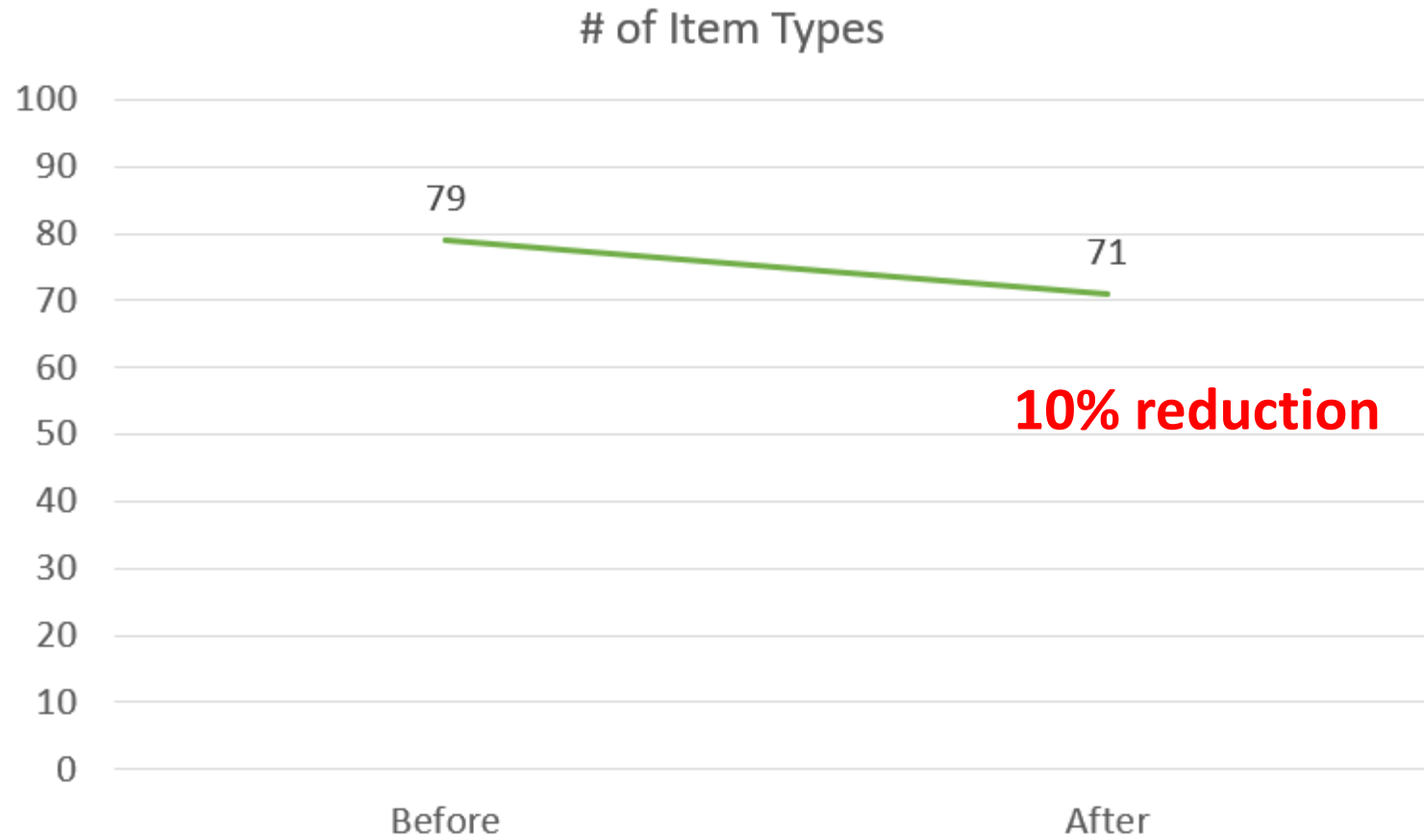4. Consult with stakeholders to determine which item types to delete

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

#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

#7 – Serials Units

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?

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