



SIERRA CIRCULATION

Circulation Parameters: What You Need to Know Before You Make Changes

Every library will need to make changes to circulation parameters. This resource offers guidelines, whether you are a long-time user or a newcomer to the Innovative system.

Before You Start:

- Consult the "View Systems Messages" file regularly (Innovative recommends checking this file daily as part of the library's general system administration). Certain errors in parameters file creation will be written to this message file, along with other types of messages. If an error message is written to the Systems Messages file, staff can use the information to fix the problem entry. For more information, see the document: [System Messages Causes and Resolutions Troubleshooter](#).
- Plan ahead and enter parameters in a logical order to save time.
- Print out the list of branch codes from Management Information for easier data entry into parameters tables.
- Enter new patron type (PTYPE), item type (ITYPE), and branch location codes into tables and create loan rules before adding new lines to the loan rule determiner table.
- Keep records of circulation parameters changes in the library's system administration documentation. If something goes wrong, it is important to be able to retrace the steps taken by staff.

NOTE: Some changes may always be made safely, and some may not. If you are unfamiliar with a table, read the appropriate online Innovative Guide & Reference discussion before making a change.

What to Check When You Change:

Branch (Location) Codes

- For a comprehensive list of tables and settings which must be checked when adding or deleting a Branch (location) code, see [Adding Branches](#) and [Deleting Location Codes](#).
- See also [Adding a New Library Location](#).

Patron Types (PTYPES)

- The loan rule determiner table -- What loan rule(s) will be applied?
- The patron block table -- What blocks will apply to this patron type?
 - **NOTE:** Always include a '9999' wildcard line in the patron block table as the last entry.
- Default templates -- Should the patron type value in any default template for patron record creation be updated?

- Z39.50 server file (REQUEST ITEM ALLOWED) -- After updating the patron type table, add or remove patron types from the list of those eligible to make Z39.50 requests for each database in which requests are allowed.
- ILL worksheet options -- Have the patron types eligible to place inter-library loan requests changed for any request type?
- Web Access Management -- Should patron types be added or removed from those eligible to access particular databases?
- Electronic Reserves (Media Management) -- Contact Innovative to change eligible patron types for viewing articles online.
- See also Circulation System Options and OPAC System Options below.

Loan rules

- The loan rule determiner table -- Which lines should be inserted for the new loan rule?
 - See also [Modifying the Overdue Variables of a Loan Rule](#).

Item types (ITYPES)

- Default templates -- Should the item type value in any default template for item record creation be updated?
- The Loan Rule Determiner table -- What loan rule(s) will be assigned to this item type?
- The Request Rule table -- Should any request rules be updated?
- The Table of Self Booking Rules -- Should any self-booking rules be updated?
- See also Circulation System Options below.

Days the library will be closed

- The Days Closed table.

Hours the library will be open

- The Hours Open table.

Circulation System Options

- "Item types & locs for categories A, B, C, & D" -- Changes to item types and location codes may require these system options to be updated.
- "Renewals: Check loan rule at time of renewal" -- Changes to patron types, item types, or item location codes can cause a new loan rule to be applied during a renewal if this option is set to yes. Staff should be alerted if this system option is set to 'yes' and there are patrons with items checked out who will be affected by changes to patron types, item types, or item location codes.
- "Recalls: Course reserves patron type for recalls" -- If a special patron type is created for course reserve recalls, the value should be entered here.
- "Fines/Bills: Charge fines for days closed" -- If the library does not charge money for days closed, changes to the Days Closed table may impact fines collected.
- "Fines/Bills: Charge fines for hours library closed" -- If the library does not charge money for hours the library is closed, changes to the Hours Open table may impact fines collected.

OPAC System Options

- Requests: Eligible patrons -- After updating the patron codes or patron type tables, be sure all eligible patron codes or patron types have been entered in this system option.

Special Considerations for Table Changes

The Library Loads Patron Records.

If the library loads patron records, the locally maintained software program that outputs the file of patron records to be loaded may need to be updated in order for newly added values to be mapped properly during the file creation. For example, if the library has created a set of PCODE3 values to input into patron records based on a value found in student records within a university registration system, then the program to generate the file will need to be updated to input the appropriate PCODE3 value into each patron record.

The library Belongs to an INN-REACH Consortium

Changes to patron types and item types should be discussed with your central system administrator.

Making a Change to a Loan Rule

Some types of changes may be made to existing loan rules. Other types of changes cannot be made to existing loan rules without undesirable results.

Evaluate whether you need to change an existing loan rule or create a new version.

1. Are any items currently checked out under this loan rule? (Search in create lists for LOANRULE = <number of loan rule>) If no, you can change any element in the rule.
2. Do you want to change the number of notices element or the days between notices elements for a loan rule that currently has items checked out under it? If yes, you must create a new version of the loan rule. These elements must never be changed in a rule with items circulating under it.
3. Do you want to change an element other than number of notices or days between notices for a loan rule that currently has items checked out under it? If yes, you must assess the impact of the change and determine whether a change to an existing rule or a new rule will best meet your library's needs. In most cases, if you want the change to apply to items currently in circulation, you may update the existing loan rule.

To ensure that current checkouts will not be impacted by changes to loan rules, create a new version of the loan rule. Suppose library staff members are currently sending two notices and would like to send three instead for loan rule #2. How can this be done? Staff will need to create a new version of the existing loan rule and update the loan rule determiner table to select the new version.

Steps

1. Create the new loan rule. A fast way to do this is to choose to copy the existing old loan rule as the new last loan rule in the table. In other words, if there were eight loan rules, staff would copy the old rule as new rule #9. Never insert a new loan rule into the range of existing loan rules, because this action will renumber those loan rules following the new entry.
2. Edit the new rule. Update the number of notices. Enter any necessary fields, such as Overdue and Overdue Recall notice text #s for the new notice. Make any other changes your library wants.

Consider editing the names of the rules so that old and new versions are distinctive:

RULE NUMBER	NAME
02	OLD 3 Weeks
...	...
09	NEW 3 Weeks

3. Notify staff of the change in loan rules.
4. Update the loan rule determiner table

Replace the Loan Rule Number

On the determined date, go into the loan rule determiner table and replace the old loan rule number with the new loan rule number. In this example library, loan rule #2 must be replaced with loan rule #9. A library could use this method for a one-time change, for example if loan rule #2 will be retired.

Loan Rule Determiner table -- Old Version

LINE NUMBER	LOCATION	PATRON TYPE	ITEM TYPE	RULE NUMBER
01	?????	9999	9999	1
02	?????	0	1,2,6	5
03	?????	0,12,13	0	3
04	?????	1	1,2,6	4
05	?????	1	0	2
06	?????	3,30	9999	2
07	m*	0-1,3-8	0	2
08	m*	9999	1,2,5,6	4
09	s*	0-1,3-8	0	2
10	s*	9999	1,2,5,6	4
11	w*	9999	1,2,5,6	4
12	w*	0,1,5	0	2
13	n*	0	0	2

Loan Rule Determiner table -- New Version

LINE NUMBER	LOCATION	PATRON TYPE	ITEM TYPE	RULE NUMBER
01	?????	9999	9999	1
02	?????	0	1,2,6	5
03	?????	0,12,13	0	3
04	?????	1	1,2,6	4
05	?????	1	0	9
06	?????	3,30	9999	9
07	m*	0-1,3-8	0	9
08	m*	9999	1,2,5,6	4
09	s*	0-1,3-8	0	9
10	s*	9999	1,2,5,6	4
11	w*	9999	1,2,5,6	4

12	w*	0,1,5	0	9
13	n*	0	0	9

Set Table Entries to Active

The user may specify if an entry in the loan rule determiner table is active or inactive. The new line may be added and set to inactive until the user is ready to assign the new loan rule. In the example below, the new lines assigning rule 9 remain inactive. On the determined date, go into the loan rule determiner table and make the lines assigning loan rule number #2 inactive. Make the lines assigning loan rule #9 active.

A library could use this method when loan rules are retained and used again, for instance in the case where the library wants to assign different loan rules at the end of a semester. This method allows the library to 'switch' loan rules when needed over the course of a year.

Loan Rule Determiner table with entries for the new rule already added

LINE NUMBER	LOCATION	PATRON TYPE	ITEM TYPE	RULE NUMBER	ACTIVE
01	?????	9999	9999	1	Y
02	?????	0	1,2,6	5	Y
03	?????	0,12,13	0	3	Y
04	?????	1	1,2,6	4	Y
05	?????	1	0	2	Y
06	?????	1	0	9	N
07	?????	3,30	9999	2	Y
08	?????	3,30	9999	9	N
09	m*	0-1,3-8	0	2	Y
10	m*	0-1,3-8	0	9	N
11	m*	9999	1,2,5,6	4	Y
12	s*	0-1,3-8	0	2	Y
13	s*	0-1,3-8	0	9	N
14	s*	9999	1,2,5,6	4	Y
15	w*	9999	1,2,5,6	4	Y
16	w*	0,1,5	0	2	Y
17	w*	0,1,5	0	9	N
18	n*	0	0	2	Y
19	n*	0	0	9	N

Items checked out under retired loan rules

When all items checked out under a retired loan rule have been returned, then staff may mark this loan rule as 'unused' in the "Loan Rule Table". Should some items remain in circulation under the retired loan rule, staff may use Batch Checkin to manage items billed under the retired loan rule.

Loan Rules

RULE NUMBER	NAME
02	UNUSED/RETIRED

1. Allow items checked out under the old loan rule to complete the billing cycle.
2. Create a list of all items whose loan rule = the retired loan rule number and whose status = 'n' (Billed).
3. Use the batch checkin function to check these items in, leaving the bill on the patron's record.

For more information, see [Batch Check-In](#) and [Batch Checkin: Managing Long Billed Items](#).

NOTE: In order that patrons whose items are checked out under the old version of the loan rule receive the new loan rule when items are renewed, set the circulation system option "Renewals: Check loan rule at time of renewal" to YES.

Help! I deleted a loan rule!

If you delete a loan rule, either by accident or deliberately, if the rule is not the last rule in your list of loan rules, all loan rules following the position where the deleted loan rule resided will renumber, causing your loan rule determiner table to use incorrect loan rule information for some circulation transactions. Additionally, checkins and renewals will use the values in the loan rule that currently matches the number stored in the LOANRULE fixed field in the item, in some cases resulting in unwanted behavior. Some transactions may default to the 'wildcard' line at the top of your loan rule determiner table (all locations, all items, and all patrons, usually assigning a non-circulating loan rule).

If you delete a loan rule that causes some loan rules to renumber, you must fix the problem as quickly as possible.

Correct the Problem

If the loan rule was unused (e.g., no checked-out items had the deleted loan rule number present in the item LOANRULE fixed field), insert a new loan rule at the position where you deleted the loan rule or append a new loan rule and then move it to the desired position. For instance, if you deleted loan rule 56, causing 57 to become the new 56 (and all subsequent loan rules to shift up by one), insert a new loan rule at position 56. This will force the former loan rule 57 (now 56 after renumbering) to return to position 57. All loan rules after 57 will also renumber to their previous numbers. This will ensure that transactions going forward will occur properly. Label the new loan rule so that you know it is not currently in use, for instance, 'unused' or 'do not delete'.

If the loan rule was in use at the time of deletion (e.g., some items had the deleted loan rule number present in the item LOANRULE fixed field), you may either insert a new rule and edit it or copy an existing similar loan rule and move it to the appropriate position in the table. Recreate the settings of the rule that was deleted.

Have library staff log in on new Circulation sessions after changes are saved.

NOTE: If possible, as soon as you know there is a problem, alert library staff to hold checkins until you notify them that the loan rule table has been corrected. This will prevent bad behaviors at checkin for items with assigned loan rules equal to or higher than the deleted loan rule.

Identify affected items

Create a list of items that circulated during the day(s) that the table was incorrect. If your library displays date and time for checked out items (OUT DATE item fixed field), the time will display as well as the date. (If your library wishes to enable display of time, contact Innovative.) If you know roughly the time when the loan rule was deleted and the time when you completed your table fix, you can identify those items that potentially were affected.

For instance, upon renumbering the loan rule table due to a deletion, the last loan rule number in the table would no longer exist. Items which should have received this loan rule would either be assigned to a different loan rule or go to the wildcard line at the top of the loan rule determiner table. Items currently out under the correct loan rule numbers should not need further action taken once the table has been repaired. You can remove unaffected items from the review file, e.g. items circulated before or after the problem existed or items out under the proper loan rule number.

Example of an OUT DATE with time stamp displaying:

OUT DATE = 03-04-07 8:30

What to do with affected items

- You may wish to print a list of any items with incorrect loan rules for staff to consult in case a checked in or renewed item gives unexpected results. You may update your review file as items are returned and create new printouts.
- Staff may wish to add an IMESSAGE or variable message field to any affected items.
- If staff wish to update items assigned the wrong loan rule to the correct loan rule, the best way to do this is to check the item in and then back out. Depending on what loan rule was assigned and what system settings are in place, the system may not renew as desired or may not update to the proper loan rule upon renewal. Note that issues such as outstanding hold queues on a title will complicate clean up involving renewals or checkin-checkout. If staff overrode due date so that the patron received the normal circulation period, staff may find it easiest to deal with any problems for these items at checkin or on a case by case basis. Examples of reported problems could include a patron's not being able to self-renew affected items or fines being incorrectly calculated on affected items.

NOTE: The wrong loan rule number will only have been assigned if a transaction would have assigned the last loan rule number in the table during the time that the table was renumbered. Many transactions may have been affected during the time that the table was incorrect, but most problems encountered will have been due to the system's "seeing" the wrong information for each loan rule following the deleted loan rule, not because the wrong loan rule was assigned.

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