Best Practices for Item Count Reports in SirsiDynix Symphony - draft

by the LOUIS Reports Working Group

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1 INTRODUCTION

The Count Items Report (itemcnt) is a delivered report in SirsiDynix Symphony.

Unless otherwise noted, the procedures described and any screenshots are taken from SirsiDynix Symphony/WorkFlows 3.4.1.3.

This document was written for LOUIS institutions. Examples reflect real values seen at member institutions but they will differ from institution to institution.

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2 SCOPE AND PURPOSE

While plenty of documentation exists that explains the basics of running reports in Symphony, members of LOUIS institutions felt they needed further guidance on how to run the reports so as to:

- Ensure consistency across institutions
- Better understand their results
- Logically construct their reports

3 REPORT BASICS

Items have three levels on information:

- Title, which has bibliographic information.
- Call number, which has information such as library and class scheme.
- Item, which has information like Item ID, Item type, etc.

The Count Item report counts records at the item level. Other reports count records at the other levels.

- To count call numbers, use Count Call Number Records.
- To count titles, use Count Titles.
- To count items, but to use characteristics of the titles in order to find them, then use Count Item Titles.

If Item Group Editor is enabled for your site, that is a quick way to get item counts based on similar parameters.

4 HOW TO INCLUDE OR EXCLUDE POLICIES

Remember that in the Count Item report, the values that are held in the fields are called policies. Depending on the number of policies involved, it will be easier to select certain policies, or to exclude certain policies.
Select the gadget for the policies. At the top are two of four selections: Include Selected Policies and Exclude Selected Policies. The selected policies are in the right hand box with the label List Selected. To move them over, select them in the left hand box and click the arrow, which will make them appear in the right hand box. If nothing is in the right hand box, that that field is considered blank and all policies are considered.

- If there are fewer policies to include, then select Include Selected Policies, and then move the relevant policies to the right.
- If there are fewer policies to exclude, then select Exclude Selected Policies and move to the right.

5 UNDERSTANDING YOUR POLICIES

Before building an item count report, it is important to understand the policies that will be used to select the items. Policy names can sometimes be cryptic because there is a ten character limit for policy names. Some location policy names at LSU are AAAS, AACC, and USCW-YP. Someone not familiar with them might have a hard time knowing what they are.

Here are some ways to determine what a given policy means, or what type of items are assigned to the policy.

- If you have access to the Configuration Module, it will have the policy descriptions listed there.
- A list of many current policies for each LOUIS institution is available from the LOUIS Knowledge Base, Solution #5165: Symphony Policies for LOUIS Sites. Among the listed policies are Library, Location, Item Type and Item Categories.
- E-Library will have labels. Look at the Advanced Search and at the drop down menus.
  - Run a search in e-Library searching on the criteria.
  - A blank search query is #0, entered as a search term. Look at the items in the results.
- If you have access to Item Group Editor, use it to identify items that are assigned certain policies (or use it to get a quick count as suggested in Section 3. Report Basics).
  - One drawback with Item Group Editor is that the items cannot be selected to get more information about them.
- Run a List Item or List Bibliography limiting by the policy in question, and look at the results.
6 Fields To Consider

Although there are several policies to consider when constructing a Count Items report, the following policies would take the most focus in a well-constructed report: Library, Home Location, Current Location, Item Type, Item Category and Shadow Catalog.

6.1 Library
The institution may contain multiple libraries. Libraries may contain one or several locations (see 6.2 Libraries), which would make it easier to select by library rather than location. Some reasons to exclude or include libraries might be:

- The library is administratively separate.
- The library houses collections that are not part of the institutional proper.
- The collection is electronic and a count of physical items is needed.
- The library houses all of the collections of a certain branch.
  - It might be useful to limit by library rather than all of the locations.

6.2 Home Location, Current Location
Home Location is where the item is when it is not charged (checked out). Current Location reflects where the item is now, whether it is charged or not. The current location is associated with the user, in that the location of the user is assigned to the item. For example, an item that is checked out to a patron might have a location of CHECKOUT or PUBLIC.

Some locations reflect a status, such as BINDERY, MISSING, WITHDRAWN.

It is important to know how your site handles discards and withdrawn items. Some sites checkout items to a DISCARD user, which assigns a Current Location of DISCARD. Other sites might assign a home location of DISCARD or WITHDRAWN.

Types of locations might include:

- Locations related to the processing of materials
  - CATALOGING, INPROCESS, ORDER
- Locations related to being lost or removed
  - DISCARD, LONGOVRDUE, MISSING, LOST, WITHDRAWN
- Locations related to reserve desks
  - RESERVE
These items might not belong to the library but to professors or instructors.
- Location related to electronic and online items
  - ONLINE, ONLINE-NLA
- Depending what is being counted, these locations may be treated differently, either being counted or not counted.

### 6.3 Item Type

Item Types are related to the circulation characteristics or policies that relate to an item.

Before considering Item Types, think about the locations because locations might logically gather together groups of item types. For example, the location ONLINE might contain all of the item types that are online.

Some institutions might use Item Type for certain items, while others might use Item Categories (see 6.4 Item Categories).

Depending on what is being counted you may need to exclude some Item Types. Item Type might include:

- Rooms, room keys, study carrel
  - KEY, ROOM, CARREL
- Electronic equipment such as laptops, tablet computers, cameras, clickers, AV-equipment
  - AV-EQUIP, LAPTOP, TABLET
- Item related to electronic and online items
  - E-BOOK, E-JOURNAL, E-MATERIAL

### 6.4 Item Category 1-5

Item categories are purely statistical, in that they do not affect circulation (unlike Item Type). Because of this, they are used to group similar items with the statistical information being the sole purpose. Thus, they will be used often in Item Count reports. Many times for item counts, the report will be limited to certain item categories, or particular item categories will be excluded.

There are five item categories, although Item Categories 3-5 were recently added, in 2013 with the upgrade to Symphony 3.4.1.3 (Service Pack 3). That means most institutions only have Items Categories 1 and 2 at this time. Generally there is some similarities between categories in Item Category 1 and those in Item Category 2. For example, Item Category 1 might identify the type or format of the item, while Item Category 2 identifies the source (vendor or publisher). Some institutions use Item Category 2 to denote Federal Depository items.

Item categories are used for:

- Identify type of material
  - AUDIOCD, BOOK, JOURNAL-UB, MICROFILM
- Identify source of material (such as vendor or publisher)
  - Indicate e-resource packages and vendors to assist with database management and the loading and removal of catalog records
6.5 Shadow Catalog

Shadowed items are hidden from the public OPAC. It might be used to hide lost items or items that are being cataloged or processed.

It is important to know how your institution handles shadowing records. Most of the time, shadowed items are held in a shadowed location. For example, a lost item might be checked out to a LOST patron, which would then assign the Current Location of LOST, which is shadowed. Items might also be directly assigned to a shadowed location (see 6.2 Home Location, Current Location).

Items can also be shadowed by using a flag, and this can be assigned at the title, call number and item level. Anything shadowed will also shadow anything below it in this title, call number, item hierarchy.

When running the Item Count report, it is possible to include or exclude items that are shadowed.

7 Further Information

Additional resources (most of these require account passwords):

- More information on the Count Items report can be found in the Symphony Helps topic “Count Items Report”.
- The LOUIS Knowledge Base has an article about reports in general entitled “5219 – Symphony Reports – Tips”.
- SirsiDynix Support Center has a Solution Detail entitled “Difference between Count Titles and Count Items Report”.