

WYLD TECHNOTE 007: Symphony Circulation Map

What is the CIRC MAP?

The circ map is a group of Symphony policies made up of library, patron, and item information that tells the system how items should circulate.

You can view your library's circulation map and other policies at <http://will.state.wy.us/wyld/map>

System Policies used by the Circulation Map

Library

- Loan period (for fixed due dates)
- Closed days, closed dates

Item record

- Item type
- Circ/nocirc option

Patron record

- Maximum charges allowed (override required if exceeds)
- Life of card (override required if card is expired; loan period may be shortened)
- Overdue threshold (user is blocked if number exceeded)
- Bill threshold (when the user meets or exceeds the bill threshold amount the user is blocked)
- Library precedence (for fixed due dates)

Once the library, patron profile type, and item type have been considered, the map assigns a **circulation rule** to the item which determines the loan period, number of renewals, number of items allowed of that type, and the bill structure.

Circulation Rules are comprised of:

- Loan Periods (hourly, daily, weekly, minutes, date list - for fixed due dates)
- Fine structure (fine increment and maximum fine, e.g. \$.10 per day, maximum fine \$3.00)
- Number of renewals allowed
- Maximum charges
- Grace period
- Whether the charge is overridable

Circulation Configuration : Modify D14-ALBY2

Name: D14-ALBY2
 Description: ALBY 14day 10c/day max \$3, 2 renews, unlim
 Loan period: 14DAY
 Billing structure: 10CDM3D
 Renew limit: 2
 Chargeable: Yes No
 Maximum charges: 25000
 Grace periods are in Days Hours Minutes
 Overridable: Yes No
 Recall loan period: RECALL
 Alternate loan period: 14DAY

Save Changes 1 Discard changes 2

Reading your circ map

The system reads the circ map from the bottom to the top. If it encounters a match between the library, item type and patron profile, it will apply the circ rule designated. If no match is found, a default rule is used for that group of patrons.

In the following example, if any patron at this library were to check out an item type JUVBOOK, the rule D14-LINC2 will be used. However, if any other item type is encountered that is not specifically listed, the rule listed as D14-LINC1 will be used.

NAME	DESCRIPTION	LIBRARY	PATRON	ITEM TYPE	CIRC RULE
DEFAULT	Rule used if specific combination is not defined	ALL	ALL	ALL	NONCIRC-Y
12-ALL-ALL	LINC-ALL Patrons, OVERALL Rule	LINC	All	All	D14-LINC1
12-ALL-AVQ	LINC-ALL Patrons, AV-EQUIP Rule	LINC	All	AV-EQUIP	D1-LINC1
12-AL-BOOK	LINC-ALL Patrons, BOOK Rule	LINC	All	BOOK	D14-LINC2
12-ALL-ILL	LINC-ALL Patrons, ILL-BOOK Rule	LINC	All	ILL-BOOK	D30-LINC
12-AL-JVBK	LINC-ALL Patrons, JUVBOOK Rule	LINC	All	JUVBOOK	D14-LINC2
12-AL-JVMG	LINC-ALL Patrons, JUVMAG Rule	LINC	All	JUVMAG	D14-LINC3
12-ALL-NEW	LINC-ALL Patrons, NEW-BOOK Rule	LINC	All	NEW-BOOK	D14-LINC4
12-AL-NJBK	LINC-ALL Patrons, NEWJUVBOOK Rule	LINC	All	NEWJUVBOOK	D14-LINC4
12-ALL-FLY	LINC-ALL Patrons, ONTHEFLY Rule	LINC	All	ONTHEFLY	D14-LINC4
12-ALL-PER	LINC-ALL Patrons, PERIODICAL	LINC	All	PERIODICAL	D14-LINC3
12-TS-ALL	LINC-TS Class, OVERALL Rule	LINC	12TS	All	D180-LINC

The overall rule for each patron profile is meant to describe how most items in the library should circulate to this type of patron. Any exceptions to that rule follow in the subsequent lines. When a library decides to start circulating a new item type, only an item which will circulate differently from the overall rule would need its own line in the circ map. Additionally, there is no need to define rules for item types that are not in use at the library in question.

View your library's current circ map (and other policies) online at <http://will.state.wy.us/wyld/map/>

Troubleshooting your Map & Requesting Changes

When an item circulates in a way that seems incorrect, you should double check the item type and the patron's profile. Check the user's record to see if the correct circulation rule was applied. If you've verified that these are correct, and the online circ map appears to be correct, contact the WYLD Office with the item barcode and the patron barcode in question.

You may request changes to your circ map at any time by printing out the html or spreadsheet forms linked online at the WYLD Technical support map site and faxing or mailing them to the WYLD Office. Certain simple changes can also be requested via email or by phone.

Any questions regarding the circulation map may be submitted to wylstaff@will.state.wy.us
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