OhioLINK

Ohio's Academic Library Consortium

How PCIRC Works: Secrets From Behind the Scenes

Anita Cook

Webinar

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What I plan to cover in today's Webinar on PCIRC

- Flow of information between systems
- How SearchOhio works
- How Pickup Anywhere works
- How Visiting Patron works
- Policies and parameters
- Lots of time for questions

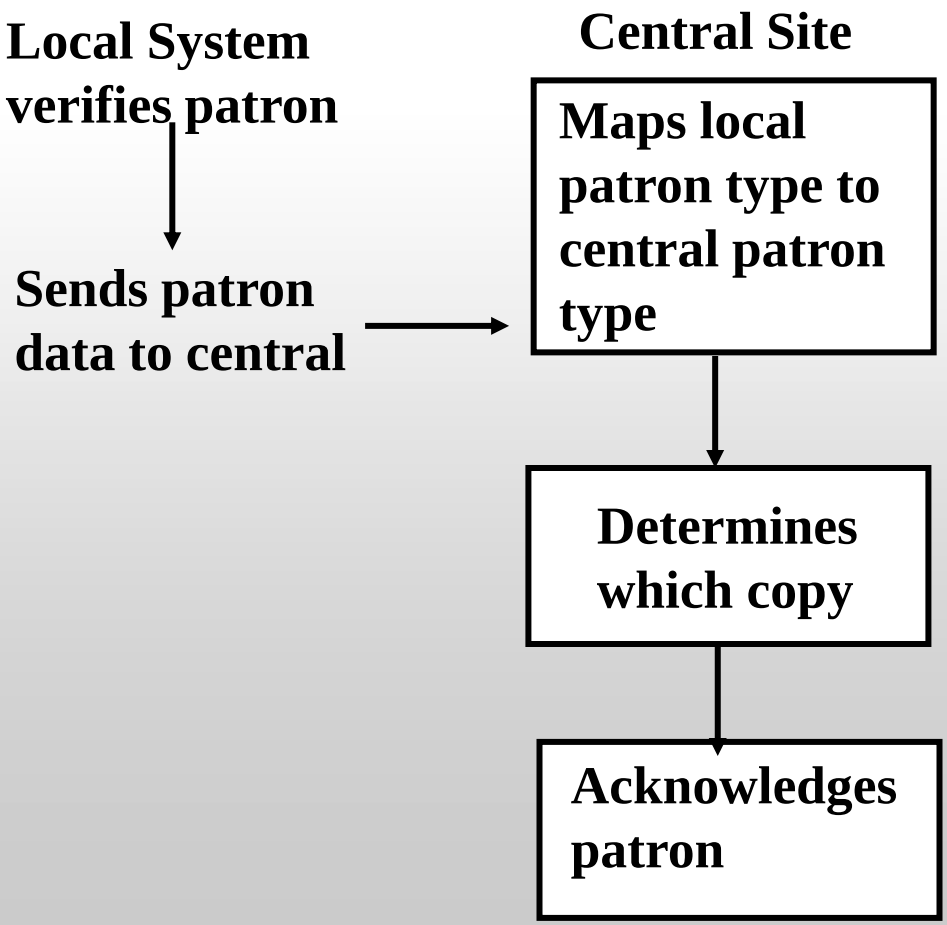
How Does PCIRC Work Behind the Scenes?

Patron requests item on central catalog

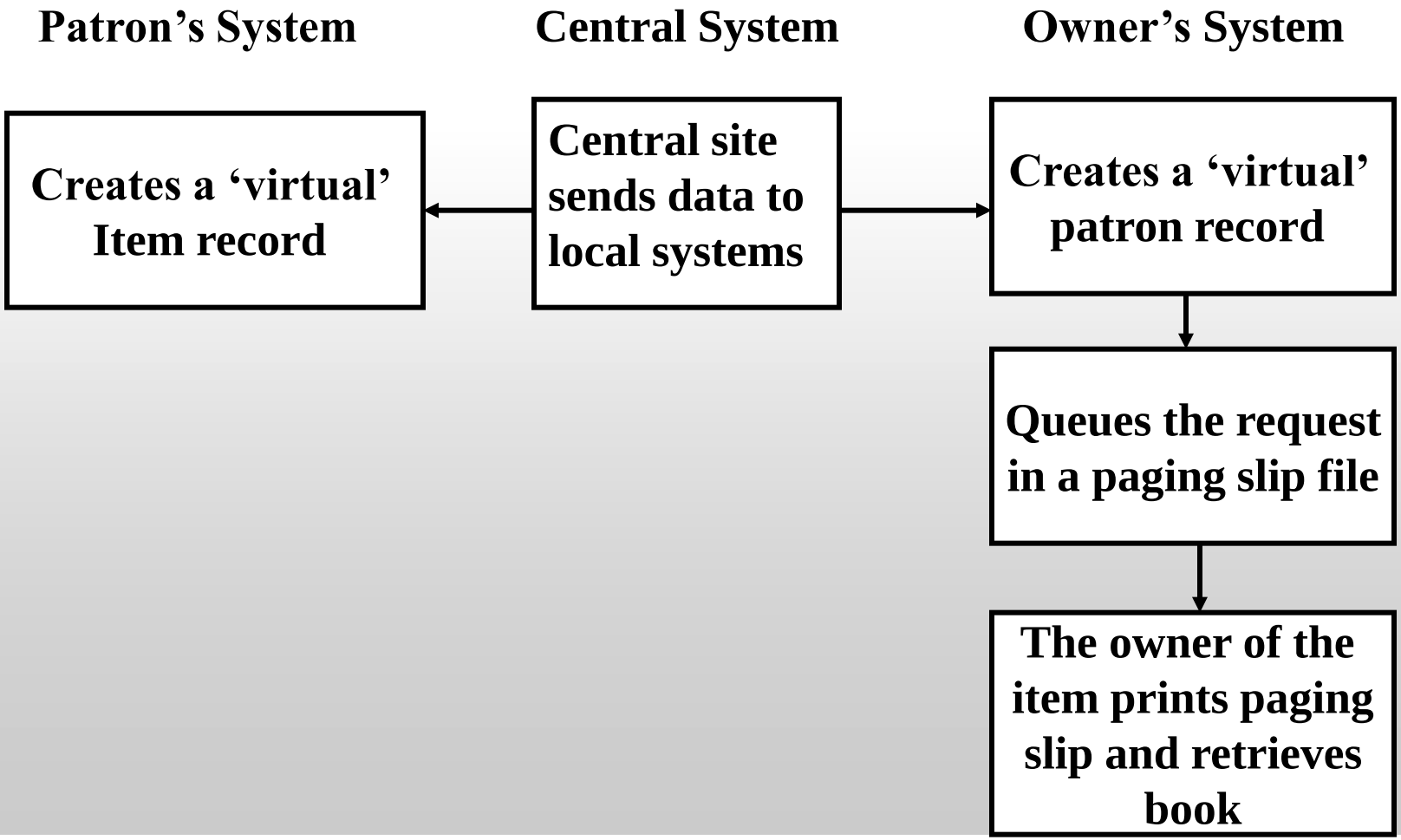
System determines availability of item

Verifies patron Against home Library database

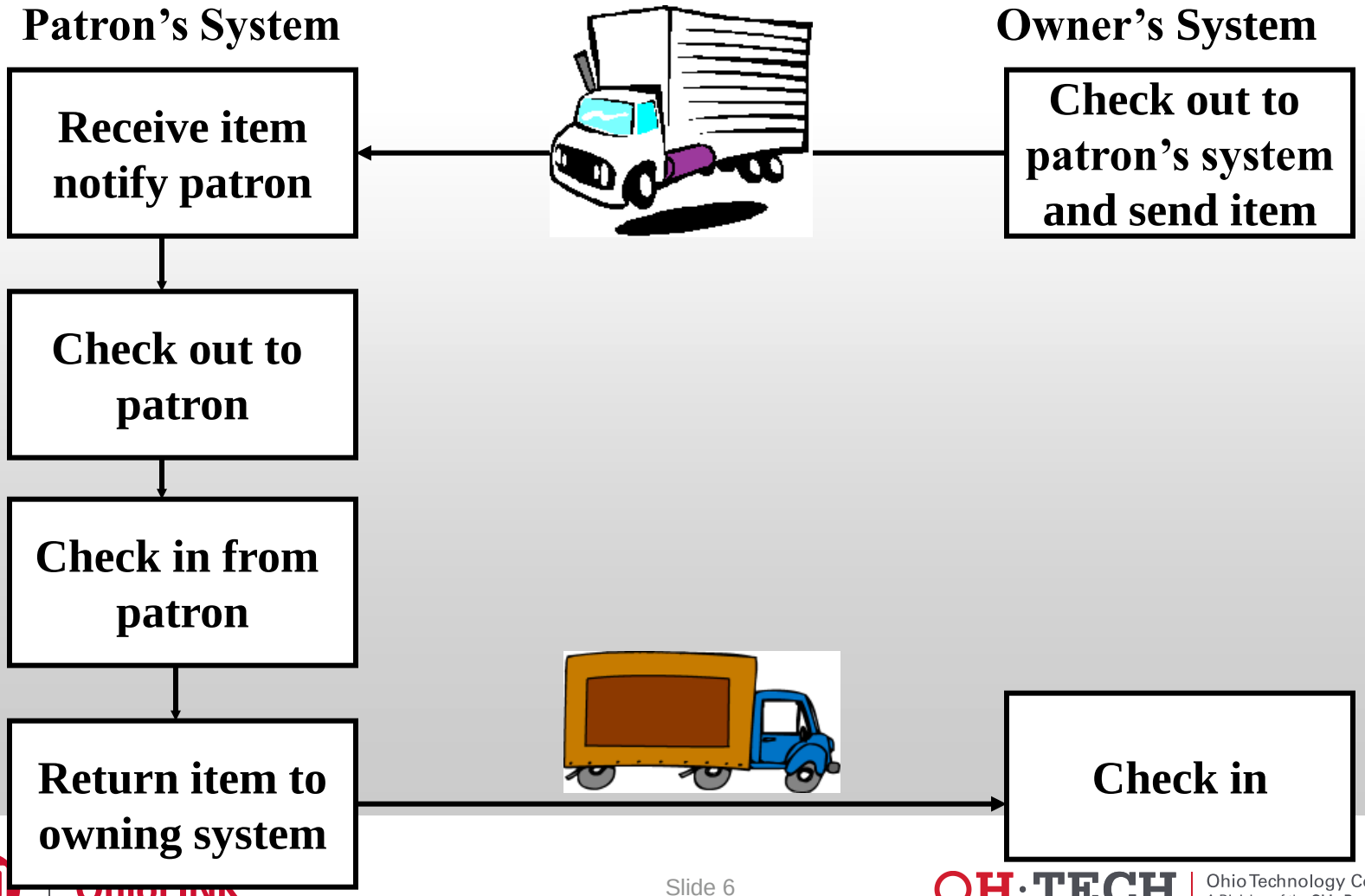
What Happens Next?



Behind the Scenes…



Getting the Item to the Patron



Things to Remember About PCIRC

- All circulation transactions between systems flows through the Central Catalog.

- The Central Catalog acts like a traffic cop, sending transactions to/from the patron's library and to/from the lending library

- Each institution is assigned a priority that determines whether they are chosen for the request

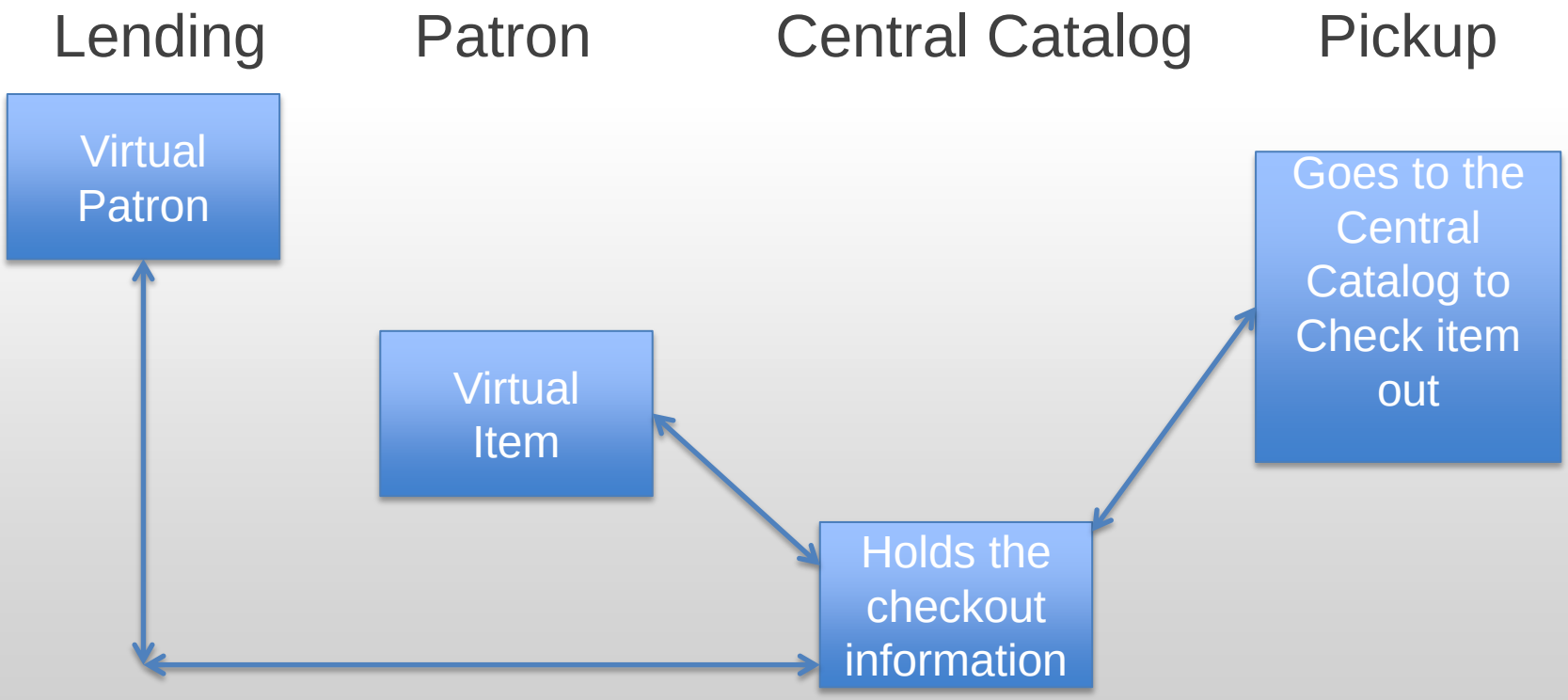
How does PCIRC work with SearchOhio?

- PCIRC works much the same with SearchOhio requests
  EXCEPT:
  - When your patron is requesting on the SearchOhio catalog your Innovative system is talking to SearchOhio's central catalog and not OhioLINK
  - When a SearchOhio patron is requesting from OhioLINK, their Innovative system is talking to the OhioLINK central catalog

How does Pickup Anywhere Work?

- Pickup Anywhere works a little differently
- There are four sites involved with Pickup Anywhere
  - The patron's home library
  - The lending library
  - The pickup location
  - The Central Catalog
- No transaction information is stored at the Pickup Location
- It still stored at the patron's library, at the lending library, and on the Central Catalog

How does Pickup Anywhere work?



How does Visiting Patron Work?

- Visiting patron works much the same as regular PCIRC except you skip the “requesting” phase.
- When a patron comes to another OhioLINK library with a book to check out:
  - Use their patron ID to look them up in their home system
  - Creates a virtual patron record in the lender’s system
  - Check the book out using the OhioLINK patron loan rule

  -- Creates a virtual item record in the patron’s system

Policies and Parameters

- What comes into play to determine a loan rule for an OhioLINK request?
  - Five character codes assigned to each Innovative system or agency
  - Patron types
  - Item types
  - Status
- Intercampus Services Committee recommends all policies

Five Character Codes

- Each Innovative system in OhioLINK has a five character code assigned to it
  - Examples:
    - os4ug Ohio State University
    - cl3tg Clark State Community College
    - fi1ug University of Findlay
    - cc2pl Cuyahoga County Public Library
- Each library in the two consortia (OPAL and Consort) also have 5 character codes (Agencies)
- https://www.ohiolink.edu/content/ohiolink_institutional_codes

Things to Remember About the 5 Character Code

- 5 Character Codes are what all parameters are based on
  - This means parameters can only be changed at the institution level, not at the branch level
    - Turn PCIRC off for a location
    - Setting priority in the priority table
    - Loan rules

Patron Types

- All locally defined Patron Types (ptype) must be mapped to one of the Central ptypes
- Https://www.ohiolink.edu/content/appendix_a1a
- So if you add or change a ptype locally, you must notify the OhioLINK office to re-map it centrally.

Item Types

- Each locally defined Item Type (itype) needs to be mapped to a centrally defined itype
- https://www.ohiolink.edu/content/appendix_a2a
- If you add or change an itype locally, you need to inform the OhioLINK office to re-map the central itype

Rules of thumb for using itypes and ptypes

- The Lending library uses a Central ptype with their local itype to check the book out to your institution (Institution Loan Rule)

- When you check it out to your patron, you use your local ptype and a Central itype (Patron Loan Rule)

Statuses

- Important things to remember!
  - Only the symbol transfers to the Central Catalog and not your local meaning
  - Only Centrally defined statuses will display a meaning—if you use a status locally that is not defined centrally, it will only display the symbol on the Central Catalog
  - Only the “-” or AVAILABLE status is allowed to be requested
  - Something can be AVAILABLE but still not be requestable because of the itype map
- https://www.ohiolink.edu/content/appendix_a6

Patron Block Tables

- Used to determine the following
  - Maximum number of requests (holds) a ptype can make
  - Maximum number items a ptype can have checked out before they are blocked from requesting
  - Maximum fine a ptype can have before they are blocked from requesting
  - Whether or not a ptype's expired patron record will block them from requesting
- All ptypes need to be defined in the Patron Block table or you get an error when you try to check an item out
- https://www.ohiolink.edu/content/appendix_a5

Summary

- The software behind PCIRC is complex but it is designed for ease of use for both the patron and the staff member
- Information about the patron and item is exchanged between systems so that no rekeying is necessary and all of the information is available for checking out the material when needed
- Maintenance of the many tables supporting PCIRC is infrequent, but a clear understanding of how these tables support the policies of PCIRC is necessary
- Coordination between the OhioLINK office and the local lead implementors is crucial for maintaining the smooth functioning of PCIRC
- PCIRC contacts should all be on the PCIRC email list
- PCIRC problems can be reported to support@ohiolink.edu

Questions

Anita Cook

Coordinator, OhioLINK Catalogs

anita@ohiolink.edu

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35 E. Chestnut St, 8th floor

Columbus, OH 43215
Phone: (614) 485-6753