

Rethinking Item Types and Collection Codes for Koha 3.0

I am writing this post to record the process I have been through thus far, to review our existing use of Item Types in Koha 2.x, in preparation for a move to Koha 3.x.

OPAC centric

I want to focus this exercise from the library users point of view. What would our patrons like to 'see' as a search result in OPAC interface?

Search Result:

- Title, author etc
- What format is it?
- Is it on loan or available ?
- If on loan when is it due back?
- If available, which library is it currently at?
- Which area of the library or which collection do I go to get it? Which collection or 'Living Room'?
- What is its shelving position ie dewey or filing letters?

Advanced Search:

- Only items not on loan OR all
- Only items at a specific library Or all
- Particular formats ie Book only or DVD OR all
- Particular audiences ie children's, teen or adult OR all
- Particular genre: romance or mystery etc
- Particular collections: easy reader fiction, picturebooks, local history etc

Item Types OR CCodes

There are two very different ways to organize a collection in Koha 3.0. Either heavy use of the Item Types OR heavy use of CCodes. My understanding is that you have to choose 1 or the other for advanced search, but not both.

Item types – These are used to set circulation policies. These are not format descriptors (GMDs). They can be set as advanced search options, and display as icons on the search results screen. The codes are never seen by the public, but informative descriptions add real value as a finding tool for patrons.

CCodes – Collection Codes can be set as advanced search options too, and can be set to display as text on search results.

Having minimal Item Types can greatly simplify the creation of circulation rules. So you could have just 3 or 4 Item types, and then use collection codes to shape your collection into ‘clusters’.

eg. Item Types:

G	General collection	3 week loan period, no rental
GR	General rental collection	3 week loan, \$3 rental
S	Short term loan	1 week loan, no rental
SR	Short term rental collection	1 week loan, \$1 rental

with a bunch of CCodes:

ANF	Adult nonfiction
CNF	Children’s nonfiction
TNF	Teens nonfiction
AF	Adult Fiction
JF	Junior fiction

Or even by genre or Living Room

FM	Fiction mystery
FW	Fiction Western
FR	Fiction Romance
BNP	People and Places

Alternatively, we could create as many Item Types as we like to reflect a finely granulated collection at Item Type level, with or without the use of Collection Codes.

If we go with many item types then I will need to craft the circulation rules carefully, loading the default position first and only creating rules for the exceptions. My old way of creating a rule for every single combination of patron and item types will be a nightmare!

If we go with Item Types I will assign icons which reflects the format or GMD (ie all book item types have a book icon). The full text description of the item type will display in the OPAC search result enabling the patron to see what format the item is at a glance.

Test Scenarios.

I created a bunch of test scenarios in order to see how applying each of the various options and combinations could best meet my objective of delivering the most useful information for the patron.

In placing a heavy emphasis on Item Types I could end up with about 100 different item types, if I fully utilized this method to reflect genres within fiction, rental fiction and large print, and also 'living rooms' or subject based sub-collections within the non-fiction.

I also wanted to test an option where heavy emphasis is placed on Collection Codes. This would streamline setting up circulation rules drastically as only 8 Item Types would be required, but I would still have to create a whole heap of Collection Codes. I could group a bunch of Item Types into 1 collection, or a bunch of collections into 1 Item Type.

Several options to test here:

- Total granulation as far as possible, for all genres and living rooms, within all collections (about 100 item types).
- Granulate for all major collections, but not for genres. Rely on the subject headings – which are hotlinks to find related material. (about 60 item types).
- As above, but enter the Genre in the Call Number field as well.
- Minimum number of Item Types created, 1 for each class of circulation eg 3 weeks & no rental, 1 week & \$2 etc.

Test 1: Total granulation of collection into Item Types:

Fiction:

Format	Description	Call Number	Location	Status	Date Due
{book icon}	Historical Fiction	LEON	Levin Library	AVAILABLE	
{book icon}	Historical Fiction	LEON		ON LOAN	20/04/2009

Nonfiction:

Format	Description	Call Number	Location	Status	Date Due
{book icon}	Children's Nonfiction	998 TAYL	Levin Library	AVAILABLE	
{book icon}	The Natural World	998.03 TAYL	Foxtan Library	AVAILABLE	

Comment:

There is a wee problem with the column header 'Description'. We would probably rename it to "Collection" so that a Patron know which part of the Library to look in, but that would cause confusion for the Fiction example since we don't have a separate Historical Fiction collection.

Test 2: Item Types not granulated down to Genre or Living Rooms.

NB: The Description column has been renamed 'Collection' but is NOT a collection in terms of CCodes.

Fiction:

Format	Collection	Call Number	Location	Status	Date Due
{book icon}	Fiction	LEON	Levin Library	AVAILABLE	
{book icon}	Fiction	LEON		ON LOAN	20/04/2009

Nonfiction:

Format	Collection	Call Number	Location	Status	Date Due
{book icon}	Children's Nonfiction	998 TAYL	Levin Library	AVAILABLE	
{book icon}	Nonfiction	998 TAYL	Foxtan Library	AVAILABLE	

Comment:

Solves the Fiction problem identified above, but now we cannot see which living room to go to for the nonfiction!

Test 3: Item Types not granulated – genre and Living Room entered in Call Number

Fiction:

Format	Description	Call Number	Location	Status	Date Due
{book icon}	Fiction	Historical Fiction LEON	Levin Library	AVAILABLE	
{book icon}	Fiction	Historical Fiction LEON		ON LOAN	20/04/2009

Nonfiction:

Format	Description	Call Number	Location	Status	Date Due
{book icon}	Children's Nonfiction	998 TAYL	Levin Library	AVAILABLE	
{book icon}	Nonfiction	The Natural World 998.03 TAYL	Foxton Library	AVAILABLE	

Comment:

The same problem again with the Fiction example, where the display implies that we shelf the Historical Fiction in a separate collection. Clunky display for the Adult Nonfiction too, even though it does make it clear which collection to look in.

Test 4: Collection Codes used extensively, minimal Item Types.

Fiction:

Collection	Call Number	Location	Status	Date Due
Historical Fiction	LEON	Levin Library	AVAILABLE	
Historical Fiction	LEON		ON LOAN	20/04/2009

Nonfiction:

Collection	Call Number	Location	Status	Date Due
Children's Nonfiction	998 TAYL	Levin Library	AVAILABLE	
The Natural World	998.03 TAYL	Foxton Library	AVAILABLE	

Comment:

The same problem again with the Fiction example, where the display implies that we shelf the Historical Fiction in a separate collection, although the Nonfiction displays beautifully. I miss the icons which show at a glance what format the item is.

Conclusion

All 4 test scenarios struggled with displaying the Fiction genres in a useful way for the Patron. This is because we do not shelf them by Genre.

The Fiction Collection Manager suggested we just stop adding them in to the catalogue, and use the subject headings instead, which would actually be more useful because different aspects of the book could be catalogued. We would not be forcing a book into 1 genre. We can still add Genre stickers to the spines if we wish, which is where they really come into their own for shelf browsers, but the catalogue will not reflect that.

This made live easier.

The reason against making loads of Item Types is the pain of creating the circulation rules table – and its not a bad enough reason to out weigh the benefits of many, finely tuned and well descibed, Item Types.

We will create Item Types for each collection and Living Room, but not by Genre for each of the 3 Fiction collections: free, rental and large print.

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