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Time in the Spotlight: A Workflow for Managing Numerous Displays

Jenny Donley

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TIME IN THE SPOTLIGHT: A Workflow for Managing Numerous Displays

OH-IUG 2019 Conference
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Fast facts about me:

➔ Closets and junk drawers
➔ 40 + 1 day
➔ Tennille
We have two vertical shelves that are dedicated to displays, but the majority of our display locations take advantage of available real estate: the empty side of our circ desk, above our Popular Books collection, and against the wall of our library’s coffee shop.
The crux of the matter, in brief:

- Multiple displays are **attractive, interesting, and basically awesome** to include in a library.
- Multiple displays are **complicated** to implement, maintain, and track.
- Multiple displays are **likely not the only temporary collections** in your library.
Before we go any further and move into information overload...

I made a thing: https://libguides.onu.edu/ohiug2019

LIBGUIDES dot
ONU dot
EDU forward slash
OHIUG2019

"I'll pause for a moment so you can let this information sink in."
Displays vs. Temporary Locations

What constitutes a temporary location?
Displays are just one reason why an item might be moved to a location other than its permanent location:

➔ **Predetermined length of time.**
   Examples: Scheduled displays where items rotate off when a new display goes up; course reserves at the end of a semester.

➔ **Length of time determined by new additions.** Example: A location comprised of new additions to the library’s collection.

➔ **Length of time determined by circ activity.** Example: Old items rotate off when they haven’t circ’d for a certain amount of time to make room for new items.

Are there additional temporary location scenarios at your libraries?
How many **LOCATION CODES** do you really need?

Two types of temporary locations in regards to permanence:

- **Hybrid permanent/temporary collections**: permanent collections comprised entirely of temporary materials.
  - Examples: New or Popular collections
  - *Makes sense to have unique codes*

- **Temporary collections**: **overarching theme is temporary**. Even if space is dedicated to displays, the entire collection gets swapped out simultaneously and might occasionally cease to exist.
  - Example: Displays
  - *Use as few display-specific location codes as possible (use ICODE1 instead!)*

**Tip**

Implementing fewer location codes reduces coding errors and makes data gathering more streamlined.

Use the ICODE1 and pop-up messages to differentiate.
“Absorb what is useful, reject what is useless, add what is specifically your own.”
~ Bruce Lee
“Plan your work and work your plan.”
~ Napoleon Hill

Planning
Folders, files, templates, and checklists: the digital and the physical

By creating physical folders that correspond to Google Drive folders, all signage and handwritten notes can be easily relocated and reused when displays are repeated.

Use Google Drive and Trello to plan displays. It allows for easy access and collaboration, and is a straightforward way to revisit and recreate previous displays.

Trello checklist →
How does your library prepare for gaps in displays?
“Productivity is being able to do things that you were never able to do before.”
~ Franz Kafka

Implementation
Does your library already utilize the ICODE1?
Local ICODE1 rules make for nuanced data.

Utilizing these five numeric characters (with a few caveats) allows greater Create Lists functionality from a single location code and can help create statistics that are more granular than those from Web Mgmt Reports.

<table>
<thead>
<tr>
<th>Displays:</th>
<th>Popular Books:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- predetermined length of time in temporary location</td>
<td>- length of time determined by circ activity</td>
</tr>
<tr>
<td>- removed and tracked on a display-level basis</td>
<td>- removed and tracked on a per-item basis</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5 characters allowed for ICODE1: __________</th>
<th>5 characters allowed for ICODE1: __________</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st character: floor number</td>
<td>1st character: floor number</td>
</tr>
<tr>
<td>F_______</td>
<td>F_______</td>
</tr>
<tr>
<td>2nd/3rd characters: 2-digit code for specific location</td>
<td>2nd/3rd characters: YY book went on Popular</td>
</tr>
<tr>
<td>FLL_</td>
<td>FYY__</td>
</tr>
<tr>
<td>4th/5th characters: month display began</td>
<td>4th/5th characters: MM book went on Popular</td>
</tr>
<tr>
<td>FLLMM</td>
<td>FYYMM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Our location acronyms:</th>
<th>Examples:</th>
<th>Examples:</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 = PB, top of Popular Book cabinets</td>
<td>11108</td>
<td>11804</td>
</tr>
<tr>
<td>12 = LV/RV, left and right vertical display shelves</td>
<td>11210</td>
<td>11902</td>
</tr>
<tr>
<td>13 = CD, circulation desk</td>
<td>11304</td>
<td>11712</td>
</tr>
<tr>
<td>14 = CW, coffee shop wall that faces circ desk</td>
<td>11402</td>
<td>11609</td>
</tr>
<tr>
<td>15 = DC, display cabinet</td>
<td>11512</td>
<td>11711</td>
</tr>
</tbody>
</table>

Note: See details in the "ICODE1: The Caveat(s)" box, but the floor number in the first character works with this FLLMM format for up to 3 floors.

Note: "Popular Books" sticker placed on the spine with the above MM/YY written on it; items removed when circ activity on the date due slip shows lack of circulation compared to the amount of time the item has been on Popular Books.
“But **WHICH** first floor display?”

Even if you add **display location specifics** beyond the floor level to the catalog description **for each display** (with the limited characters allowed), it isn’t necessarily going to suffice as directional assistance because **patrons don’t know the library as well as you do**.

**Tip**

If you add the display’s theme or specific location to the item record’s pop-up MESSAGE field, reshelving circulated items is straightforward. The Circ Desk can also look at the record and provide directional assistance if a patron can’t find the display.
Benchmarking displays

If you've ever been curious about the popularity of one display versus another, there is a way to find out:

- benchmark items before they go on display
- compile the data after the display concludes
- record it for future consideration

Tip
ICODE1 fields and internal notes are game changers in our ability to compare the popularity of different displays.

Sure it's tedious, but it's also simple math.
1. Add internal notes in item records that benchmark **historic circ activity**.
2. When updating codes at end of display, add up **circ activity changes** and **compile display-level total**.
3. Include the ICODE1 in the spreadsheet to allow for sorting by display location and/or month.

**Macro for “x” NOTE → “Change back to X; chkout X; renew X; intl X”**

- **Change back to X**: Replace X with the code for the permanent location of the item before changing that field to the temporary location code.
  - LOCATION onuu HML 3rd Floor
- **chkout X**: Replace X with the number from the TOT CHKOUT field.
  - TOT CHKOUT 13
- **renew X**: Replace X with the number from the TOT RENEW field.
  - TOT RENEW 6
- **intl X**: Replace X with the number from the INTL USE field.
  - INTL USE 1

The completed field will look like this:

```
NOTE | Change back to onuu; chkout 13; renew 6; intl 0
```

---

### ICODE1 and end month if longer than a month

<table>
<thead>
<tr>
<th>Format: XXXX-mm</th>
<th>Year: yyyy or yyyy-yy</th>
<th>Display name/theme</th>
<th>Display total: Change in TOT CHKOUT</th>
<th>Display total: Change in TOT RENEW</th>
<th>Display total: Change in INTL USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>ex. 11105-08</td>
<td>2019</td>
<td>Women Athletes</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11205-08</td>
<td>2019</td>
<td>Bingo Books</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11108-09</td>
<td>2019</td>
<td>Books to Movies</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11208-09</td>
<td>2019</td>
<td>Newly Tenured</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11110</td>
<td>2019</td>
<td>Halloween</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11210</td>
<td>2019</td>
<td>Opioid Abuse</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11111</td>
<td>2019</td>
<td>Unusual Research Topics</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11211</td>
<td>2019</td>
<td>Vikings</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11112-01</td>
<td>2019-20</td>
<td>Warm Weather Reads</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11212-01</td>
<td>2019-20</td>
<td>Pantone Color of the Year</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11102</td>
<td>2019</td>
<td>Failed Love Stories</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11202</td>
<td>2019</td>
<td>Ohio Authors</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11103</td>
<td>2019</td>
<td>Irish History</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>ex. 11203</td>
<td>2019</td>
<td>Videos Games</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Color key:**
- Gray equals example data

← the power of macros!
Too much room for error?

**Concerned** about adding additional steps/fields to your display process?

Do **students or volunteers** handle the changing of codes for your display items?

Consider a **quick reference guide** like the one to the right that is based on an item’s permanent location code.

The guide to the right does not include benchmarking but the screenshot from slide 15 could be modified for that purpose.

Once we finish our trial period and decide whether or not to continue the nuanced tracking, for some or all temporary locations, we will update our processing manual procedures.
“Life is too complicated not to be orderly.”
~ Martha Stewart
Review: Create Lists!

- Automate whenever possible to reduce errors, identify outliers, and double-check that all codes were changed for a particular display’s ICODE1.
- **Pull shelflists** for temporary collections and specific displays by combining the ICODE1, LOCATION code, and LOANRULE = 0.
- Wondering how many items from **temporary collections** are circulating? Same as above, but LOANRULE ≠ 0. This is helpful when a display ends as well. Codes can be changed ahead of time so that when the item returns, it will be shelved in the appropriate permanent location.
- Create pull lists that **only include the oldest materials** in a temporary collection.
Stats: How much do you need to know?

➔ **Web Management Reports**

Use Innovative’s Web Management Reports to pull circulation statistics related to temporary location codes and collect checkout, renewal, and inhouse use statistics to support the inclusion of temporary locations in your library.

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>PERCENT</th>
<th>QTY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display - 1st Floor</td>
<td>0.8%</td>
<td>74</td>
</tr>
<tr>
<td>HML 1st Floor - New Books</td>
<td>1.8%</td>
<td>165</td>
</tr>
<tr>
<td>HML 1st Floor - Popular Books</td>
<td>1.8%</td>
<td>169</td>
</tr>
</tbody>
</table>

➔ **Benchmarking and the ICODE1**

By benchmarking the circulation activity for an item, nuanced statistics can be pulled at both an item and display-level for your temporary locations. It’s manual and tedious, but the math is simple and the results can make or break your argument for or against particular display locations or themes.
Image credits

- **Slide 3:**
  Display images are from Heterick Library’s personal collection.
- **Slide 4:**
- **Slide 5:**
  https://medium.com/@QuickToYou/a-fail-safe-humor-strategy-for-leaders-5322765f4e77
- **Slide 7:**
  http://viet.usdeltarealty.com/location-location-location/
- **Slide 16:**
Questions?

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Please feel free to reach out to me after OH-IUG to ask follow-up questions or to discuss your library’s particular temporary location situation.