

Spydus 8 Stock Rotation Plans

Introduction

Version 8.4.0 of the Spydus server includes a **stock rotation plan** feature against individual items.

This is useful when you want to rotate items to other locations based on the title rather than on Collection. Stock may also be rotated to sub locations.

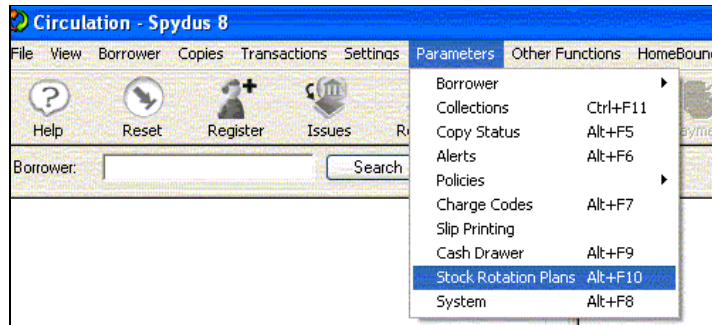
Here's what we'll cover in this fact sheet.

- Create Stock Rotation Plans
- Rotation Type
- Restarting single pass type
- Searching for items linked to a stock rotation plan in staff Web enquiry

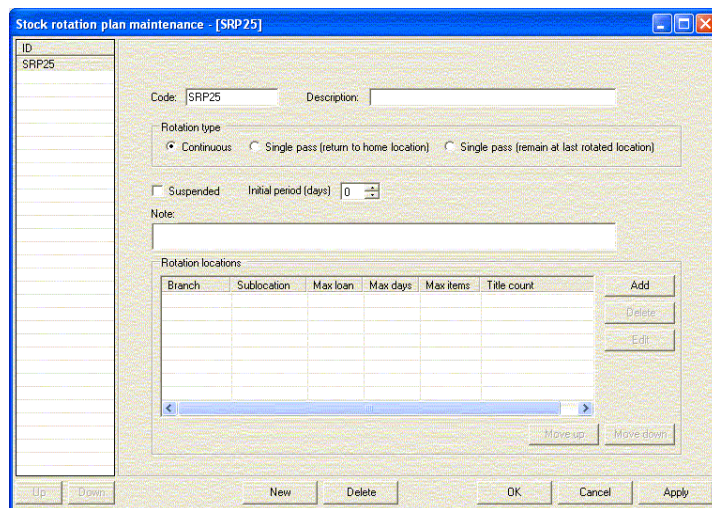
Create Stock Rotation Plans

Let's work through a simple example to set this up. You can set up as many rotation plans as required.

1. Open up the Circulation module. Go to **Parameters > Stock Rotation Plans**.



2. Click **Stock Rotation Plans** and this will open the stock rotation plan maintenance dialogue



3. Now you can create the stock rotation plans and select the branches in which you want the items to be rotated within. Click **New** and an auto-generated ID will appear in the Code field box. Let us rename this to 'City1' and name the description 'City Plan 1'.

You will notice that there are 3 rotation types to choose from – continuous, single pass to home location and single pass (remain at last rotated location). We will explain each of these types in detail later.

Suspend

You can set up stock rotation plans and link it to items. However, if this plan is not required in future, you can suspend it so that it cannot be selected and linked to any other items.

Existing items linked to a suspended plan will also no longer rotate.

Initial period

This allows you to specify the number of days that an item is held in its home location before it is rotated. The initial period is only applicable if the home location is not in a plan.

For example:

1. Location A is the home location of an item and Location A is not in a rotation plan. If the initial period is set to 30 days, the item will remain in the home location for 30 days before it is transferred to the first branch in the rotation plan to be rotated.
 - Plan 1 consists of Locations B, C & D (sequentially). Location A is not in the rotation plan. When an item is first issued and returned at Location A, it will stay there till the number of days set in the initial period is fulfilled.
 - After the initial period (for e.g. 30 days) is fulfilled, the item will rotate to the first location in the plan (in this case – Location B).
2. Location A is the home location of an item and is part of a stock rotation plan. Therefore, regardless of whether the initial period criterion is null or has a value; Spydus will only look at the max loans/days/items/title check count criteria.

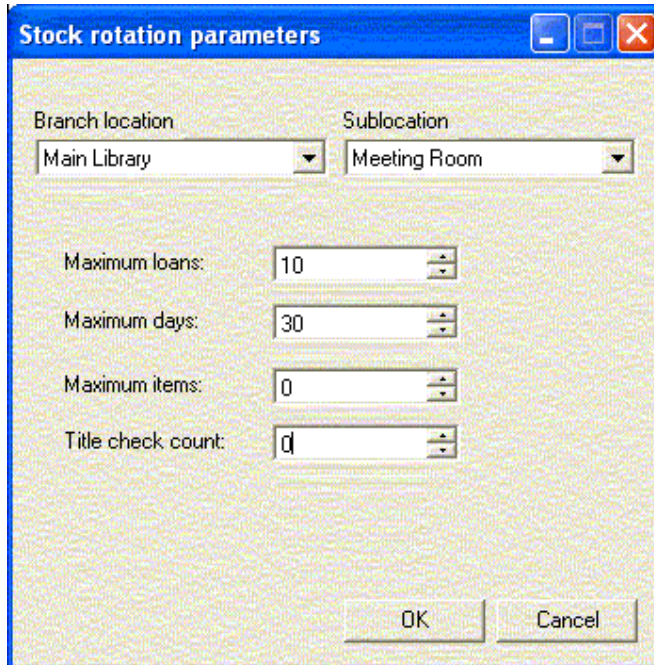
When any of the other criteria is met, the item will move to the next location (according to the rotation plan).

However, this only applies to the first time an item is issued and returned. Once an item has been through a plan (or is in the midst of a plan), the initial period criterion is void.

Add

Click **Add** to bring up the stock rotation parameters dialogue.

From here, you can select the branch location, or sublocation (where applicable), and fill in the criteria that you want the plan to fulfil (e.g. maximum number of loans, days, items and/or specify the total title check count.)



Click **Ok**, and you can continue to add more locations or sublocations to the plan.

Maximum loans

After this number of issues at one location, an item will be moved to the next location. This can be null if you're using **Maximum days**.

Maximum days

After this number of days at one location, an item will be moved to the next location. This can be null if you're using **Maximum loans**.

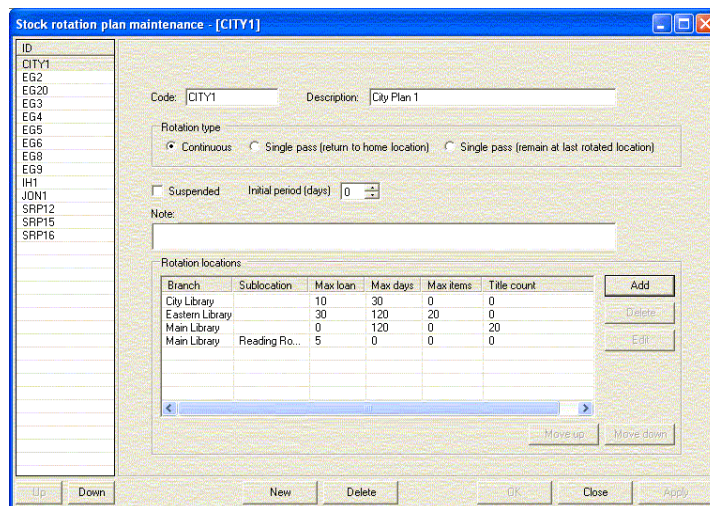
If you have both **Maximum days** and **Maximum loans** set then an item will be moved whenever one of these criteria is met.

Maximum items

The maximum number of stock rotation items that can be held at each location at any one time. If you leave this null then there's no limit to the number of items that can be held.

Title check count

This will specify the maximum number of items for each title held in the location. SO, if you set the title check count to 50, then if there are already 50 items to one title, the 51st item (of that title) will not be rotated to this location. If this is set to null, then there is no limit.



Once you have set up the locations for items to rotate to, you can click **Apply** or **Ok** to save the changes or add a new plan.

Delete

If you add a location incorrectly to your plan, you can remove this by selecting the branch location to remove and click **Delete**.

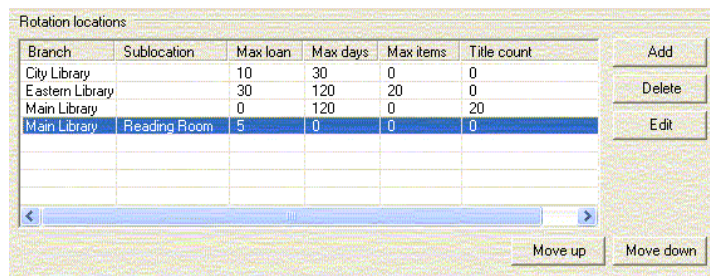
Edit

This allows you to edit any existing criteria (e.g. max loans or days etc) that you have set in a stock rotation plan.

Move up/Move down

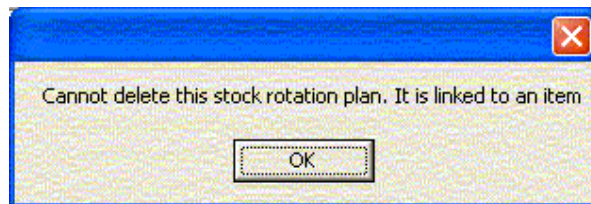
You can move the sequence of the rotation by clicking on either the Move up or Move down button. The sequence of the rotation will rotate according to the way the plan has been set up.

Let's use the plan that we set up earlier (City1). For example, an item is linked to City Library in the stock rotation plan – City1. The rotation will start from City Library and be rotated to the other locations (Eastern, Main Library and Main Library reading room). If you move the Main Library into the second position, the item will rotate to Main Library first, Eastern Library second and lastly Main library reading room.



Delete (bottom of dialogue)

This allows you to delete a stock rotation plan. However, if there are any existing items linked to this stock rotation plan, you will not be able to delete this plan until all items have been unlinked.



Rotation Type

Continuous

This rotation type will rotate the items in a continuous sequence. This means that if a Stock Rotation Plan is set to this type with 4 branch locations, then once a rotation sequence moves from Location A right through to Location D, it will rotate to Location A again, and the sequence will continue, until this item is removed from this stock rotation plan.

For example, Plan A is:

City	– max 3 loans / max 4 items
Caulfield	– max 2 days / max 5 items
Clayton	– max 1 loan / max 3 items
Main library reading room (sub location)	– max 3 loans/ max 3 days

In the above example, an item in 'City' will rotate whenever any one of the criteria is met first. So, if the item has been issued and returned 3 times, the item will rotate to the next location – 'Caulfield' and so on. However, because the max items criterion is set as well, if 'Caulfield' library already has 5 items linked to the same plan, no more items will be rotated to the 'Caulfield' library. The item will then skip 'Caulfield', and rotate into the 'Clayton' library.

Single pass (return to home location)

This rotation type will rotate items only once. It does not matter if an item is first rotated in a location within a plan that is not its home location.

Example – Plan B is:

City	– max 20 days/ max 10 loans
Caulfield	– max 20 loans/ max 20 items
Clayton	– max 20 loans / title check count 10

The item's home location is 'Clayton'. However, the item was first issued and returned at 'Caulfield'. The item will then rotate into 'Clayton', then 'City' and skip 'Caulfield' and return to the home location – 'Clayton'. Once this plan is complete, the item will remain at its home location until it is moved to a different plan, or if the plan is 'reset'.

Single pass (remain at last rotated location)

Items linked to this type of plan will rotate once, and remain at the last rotated location.

Example – Plan C is:

City - max 20 days/ max 25 items

Caulfield - max 25 days/ title check count 10

Clayton - max 30 days/ max 10 items

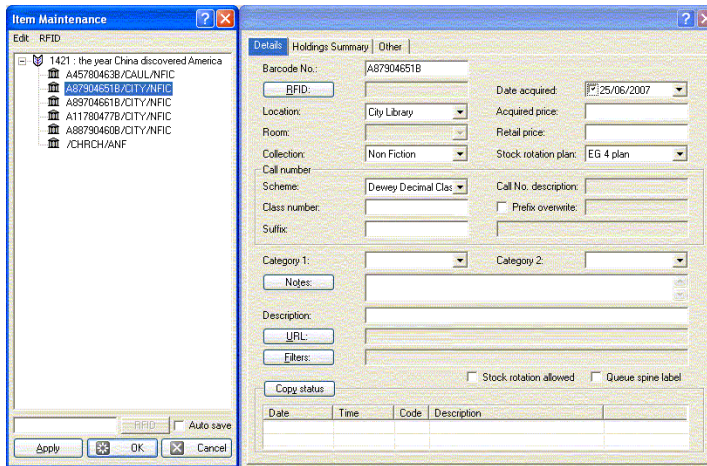
This type of plan will ignore the home location of the item. Therefore, an item whose home location is 'City' can be first issued and returned at 'Caulfield'. The item will rotate according to the criteria met in the plan, and if it is able to, will rotate into 'Clayton' and stay there. However, if there are already 10 items (linked to the same plan) in 'Clayton', the item will rotate into 'City' and not rotate anymore.

Note: An item does not always have to start in its home location for the stock rotation plan to be iterated. An item may be issued or returned in a separate location within the plan. For example, Item A (whose home location is A) is first issued and returned in Location B of the plan. When the criteria of this plan in Location B are met, the item will rotate according to the plan. So, if Location C is after Location B, the item will rotate to Location C and so forth.

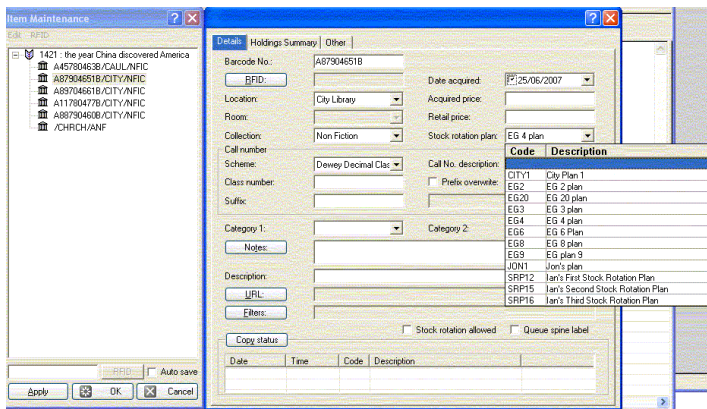
Restarting single pass type plan

You can restart a single pass type plan if required. To do this, find a list of items from the Staff Web that have completed the plan that it is in and download in a saved list. (This is covered in the next chapter).

In the Circulation module, go to **Copies > Item Maintenance**. This will bring up the web enquiry page. If you know the title or the accession number, type this in and click **Ok**. Click on the correct accession number and click **Ok**. Then click **Ok** again to retrieve the item into the item maintenance dialogue.



Once in here, you can select the stock rotation plan drop down menu and move this item into a different plan, or to a blank field.

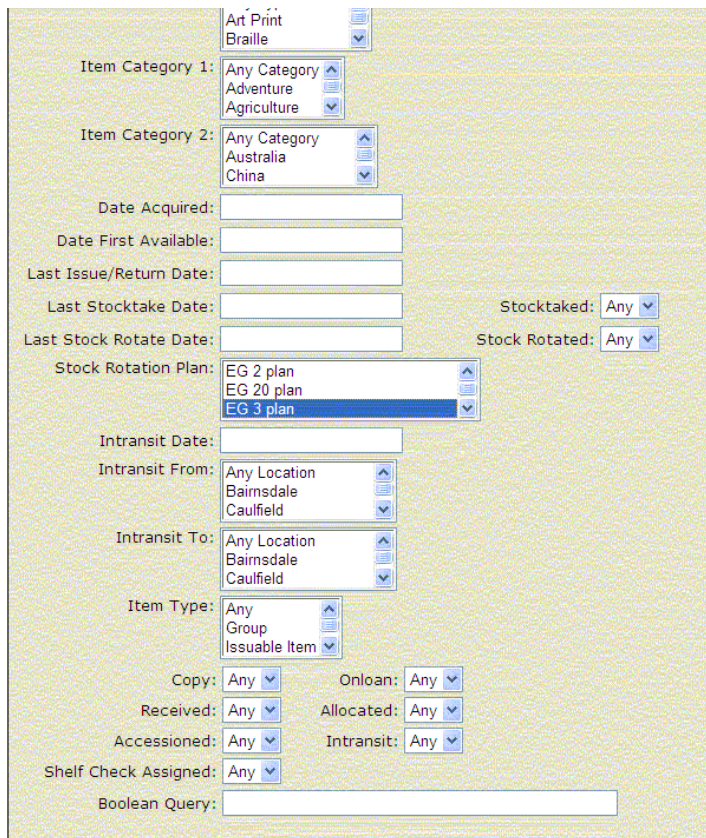


Click **Ok** to save the changes.

Then go back and retrieve the same record, and select the same plan (if you want it to rotate the item in the same sequence). This will probably not happen often but is an option if required.

Searching for items linked to a stock rotation plan in staff Web enquiry

You can search for items that are linked to an existing stock rotation plan. Go to the web and click on **Circulation>Item>Item Search**.



The screenshot shows the 'Item Search' form in the SPYDUS system. The form is set against a light green background and contains various search criteria. At the top, there are dropdown menus for 'Art Print' and 'Braille'. Below these are two 'Item Category' dropdowns: 'Item Category 1' with options 'Any Category', 'Adventure', and 'Agriculture'; and 'Item Category 2' with options 'Any Category', 'Australia', and 'China'. There are several date input fields: 'Date Acquired', 'Date First Available', 'Last Issue/Return Date', 'Last Stocktake Date', and 'Last Stock Rotate Date'. To the right of these are two dropdowns for 'Stocktaked' and 'Stock Rotated', both set to 'Any'. The 'Stock Rotation Plan' dropdown is currently open, showing 'EG 2 plan', 'EG 20 plan', and 'EG 3 plan', with 'EG 3 plan' selected. Below this are 'Intransit Date' and 'Intransit From' dropdowns. 'Intransit From' has options 'Any Location', 'Bairnsdale', and 'Caulfield'. 'Intransit To' also has the same three options. The 'Item Type' dropdown has options 'Any', 'Group', and 'Issuable Item'. At the bottom, there are several more dropdowns: 'Copy', 'Onloan', 'Received', 'Allocated', 'Accessioned', and 'Intransit', all set to 'Any'. A 'Shelf Check Assigned' dropdown is also set to 'Any'. Finally, there is a 'Boolean Query' text input field at the very bottom.

Select the plan that you want to view and click **Ok** to display the information.



Staff Catalogue

Search Holdings Acquisitions Cataloguing Circulation ILL/Requests Community Info Operations Databases Help

Sort Set Refine Set Translate Set Select a saved list option

Stock Rotation Plan: EG 3 plan
Your search found 7 records. Displaying records 1 to 7.

- Doctor doolittle and the green canary
Accn No: A000045798
Held at: Southern Library - Junior Easy
- Calming the mind & discerning the real
Accn No: A770894618
Held at: Northern Library - Adult Non Fiction
Loan Due: 27 Jul 2007
- The bondage of love
Accn No: A09786408
Held at: Eastern Library - Adult Fiction
- Almost a hero
Accn No: A897640898
Held at: Northern Library - Adult Fiction
- Fruit and flower letter designs for you to make
Accn No: A879460788
Held at: Main Library - Chinese Non Fiction
- The magic orange tree and other haïtian folktales
Accn No: A789046658
Held at: Western Library - Junior Fiction
- An Apple for kids
Accn No: A897000338
Held at: Main Library (Main library reading room) - Junior Fiction

Sort Set Refine Set Translate Set Select a saved list option

Logon: Elyria
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This list can either be printed or saved to a saved list.

Earlier, we mentioned how you can unlink items from a plan that you want to delete. When you have retrieved this list by searching for the plan (to be deleted), then you can go through item maintenance to remove the plans from each individual item.

At the moment, this is the only way of unlinking an item from a plan. However, Spydus is developing a more efficient way of unlinking multiple items from a plan.