

Collection Allocation Cheat Sheet


Before using the Collection Allocation screen you should:

Have your Collection Allocation Numbers from your needs assessment

Print out a Collection Allocation Report for the model you are using in Libris Design so you can determine which Volumes should be added or deleted

1. Look at the Collection Allocation report to determine which collections to delete.
2. Go to the appropriate Collection Subcategory or Category screens (Pink) and delete unnecessary Collection Subcategories and Volume Types.
3. Go through the Collection Subcategory screens and add volumes that aren't in the original model. (Make sure they are the correct Collection Type.)
4. For each Collection Allocation screen, (Book, Multimedia, Periodical) use the numbers you've obtained from your Needs Assessment and change the following:
 - a) Change the Number in the Total Holdings box to your total projected holdings for that Collection Type (Book, Periodical, Multimedia)
 - b) Change the Target holdings for each Collection Category (Adult/Young Adult, Children/Juvenile or Combined.)
 - c) Add a Number of Holdings and a Percent in Circulation for each Volume Type you have added.
 - d) Correct the Number of Holdings and Percent in Circulation for each Volume Type that is shown on the screen now.
 - e) Using the record navigation buttons go to each Collection Category screen for this Collection Type and follow steps c & d above.
 - f) The Total Holdings and the Sum of the Target Holdings (by Category) should match and the red number next to the Holdings box at the top of the screen should be 100%. Use the record navigation buttons to go through each Category screen to make sure that the Target Holdings and the Actual Holdings match.

Notes:

- To get to the Collection Allocation screen for each collection, be sure the name of the Collection (either Book, Periodical or Multimedia) shows in the Collection Type box on the Collection Type screen before you click the "Allocate Collection" button. Use the record navigation buttons at the lower left corner of the Collection Type window to move between Collection Types.
- Error messages you get while opening or closing the Collection Allocation screen are reminder you of numbers that need to be changed. You **will** be able to open and close Collection Allocation screens without making the corrections.
- *Use the context sensitive help by clicking on the  in the right hand corner of the Access tool bar to follow step by step help for the Collection Allocation Screen.*