ALL-WALS Agenda Outline

Ripon’s Public Library

May 31st, 2016

**9:00 – Coffee & Conversation**

**9:30-10:00 – The Meeting**

1. **Recap/Update from March 29th 2016:**
   1. **There is now the option of ONORDER-LH item type.**
   2. **Home Location is for an item’s Location**—where it is.
   3. **MISSHOLD vs MISSING** –MISSHOLD only for things missing from holds shelf.
   4. **Maintenance –** done!
   5. **Please remind staff to sign/date notes, emails** – UPDATE
   6. **REMEMBER**—Make sure item has Icat 4, Icat 3

d. **UPDATE**: Question about MISSING: Missing items are converted to DISCARD and removed from the database if they haven’t had activity in the last 18 months. Do you want a monthly Missing List?

e. **UPDATE**: (Handout) We have created a standardized form to use when sending materials that are damaged/missing bits, or otherwise have some weirdness going on. Please let us know if we need to tweak it before printing mass quantities. Mark said Winnefox could make copies for the libraries.

f. **UPDATE**: If your Add/Edit Item default screen DOESN’T have the Item Cat4 filled in as CIRC, let Melissa or I know. Please check any/all PCs that add/edit items.

f. **ADDENDUM:** Please don’t forget about Item Cat 3. When adding materials, set the Item Cat 3 to *something.* Either take your best guess at FICTION/NONFICTION, or make it UNKNOWN.

1. **Small Fry –** 
   1. **Properties**—Never save Properties when it asks! The only exception is after changing report session settings, it will ask to save. That is the only time it is OK.
   2. **Staff Cards** (Handout) – There are many “patron” records that have been created for Staff use. There are many legitimate reasons for these cards and, for the most part, they are being used appropriately. However, there are also many that are problematic.

**Problems**: personal use; long term checkouts (3+ mo) of other libraries’ materials; not getting counted as circ; no notices being sent; displays as “DAMAGED” but isn’t (and might get purged by maintenance reports); unavailable to public.

* 1. **Required Field --** There are many still labeled “\*\*\*REQUIRED FIELD\*\*\*”. Oshkosh tech cleans these up periodically. Just a quickie reminder to be careful when adding short records to fill in the 245 and 020 fields.

1. **SirsiDynix Conference (COSUGI) recap**

BREAK!

1. **What tasks am I missing?**
   1. Looking for Claims Returned, billing patron? **Weekly --** Handout
   2. Looking for Missing items? **Monthly --** Handout
   3. Checking Patrons’ addresses/UCAT1,2? **Monthly on the 2nd**
   4. Cleaning off the Holds shelf? **Daily --** Handout
   5. Taking things off Local Hold? **Monthly on the 22nd**
   6. Cleaning out old, finished reports? **weekly**
   7. Checking for items with more than 5 holds? **weekly**
   8. Checking for titles you don’t own, but your patrons have on hold? **Weekly**
   9. Clean up bounced email addresses? **Daily, if they exist.**
   10. Placing Item Specific Holds? **Immediately, if they exist.**
   11. **Why look for overdues before patron claims returned???**
2. **Catalog**
   1. **Favorite Authors – demo**
   2. **Survey**
   3. **Known Issues**
      1. MyAccount click on Title
      2. Buttons not disappearing.
      3. Can’t limit by Available and format or library
3. **Discussion: Re-Thinking Renewals**?
   1. **Automatic renewals**?
   2. **New software feature**: Renewals will go from original Due Date
   3. **Renewals v**. **Longer due dates?**
4. **All About Holds** – well, maybe not *all…* Most of this is available on the Extranet by doing a search for “holds.”
5. **Basics:**
6. The method for determining which copy gets snagged for a hold is basically random. unfathomably complicated
7. Holds are setup so that “my patron gets my library’s stuff first.”
8. Local Holds item types also affect which patron gets what when.
9. **Placing Holds** – when placing holds for patrons
   * 1. Don’t tell them how many people are before them—you can’t tell—see Basics.
     2. Remember you can change pickup location, suspend holds, etc for patrons.
     3. Handout. You can also put a Comment which will display when the item gets trapped. So, if your patron doesn’t want to get called, type “don’t call” when placing the hold. This doesn’t work in the catalog, only Workflows.
10. **Old holds**—Holds older than 9 months get processed monthly by Kathy Grace in OPL Tech EXCEPT for the following libraries: ***Berlin, Coloma, Kingston, Menasha, Omro, Poy Sippi, Princeton, Ripon and Winneconne.***  If any of you would like Kathy to process the old holds for your library, let me or Kathy know.
    * + 1. **Most are on copies which have become “unholdable.”** The patron places a hold on the title and the copy(ies) get marked lost, missing, damaged, etc.  If an item is marked LH or DA, and the hold is for an Oshkosh patron, Kathy usually communicates with the library about the material.
        2. **Next most popular reason: Local Hold.** LHs are another reason for old holds because the library has chosen to keep their materials on LH for more than 6 months.  Kathy follows through on these for Oshkosh but just leaves them for the other libraries because they usually get filled within the year.
        3. **Some are stuck**—We’re not exactly sure what causes it, but sometimes the system snags a copy to fill the hold, and won’t let go. If that copy somehow becomes unable to fill the hold (LH, WD, DA, etc), the hold never moves on.
        4. **Some On-Order titles never get released**— – if Kathy gets notification that a title is cancelled she removes all holds and deletes the title from the catalog.  If she doesn’t receive notice, the title can stay in the catalog for years because it is really still on order.
11. **Cleaning Holds** – needs to be done daily M-F. Look on your Holds shelf for the items on the list, scan them with Check Item Status to determine what to do with them.

**Why use the list?** Because it includes items the patron CANCELLED. If you only pull by date, you’ll miss the cancelled items. ALSO, it puts items INTRANSIT so that they don’t appear as “Available” and so they can be tracked.

**What determines what is on the list?**

The Clean Hold report lists any INACTIVE hold that was CANCELLED or EXP\_ONSHLF. The Expire Holds reports (which you never see—they just run) changes the hold to EXP\_ONSHLF.

It is not uncommon for there to be items on the Clean Holds Shelf that are checked out—frequently the patron changed their mind and picked up the item before you had a chance to clear it.

**If time and interest permit:**

* Library Sharing sessions about what’s happening at your library
* Discussion: Collections
* OWLS Update
* **PLA** – Outcomes, Training, etc
* **WAPL** – who went? What did you learn?