

ALL-WALS Agenda With Notes

Ripon August 15th, 2023

Agenda:

8:45-9:00 Donuts and discussion.

9:00- 12:30 –ALL-WALS

REVIEW:

- 1) Review:** “There is a long history of strong cooperation, collaboration, and trust among the Winnefox member libraries....As part of that history, there have been discussions and consensus agreements about how libraries are to operate and of how library staff are to function in this cooperative environment.” –from “Principles of Participation in the Winnefox Library System”

There have been just enough instances of Library A getting upset at Library B for something not being done “properly” that it is worth reviewing some of the themes that build the trust mentioned in the Principles.

- a. Be respectful of other libraries’ materials & patrons**– That means checking with other libraries before doing extra renewals, or waiving bills, or handling damaged/lost materials. Also, being careful not to modify others’ items.
 - b. Be respectful of staff time: yours and others**—staff time IS money. Time spent tracking down lost/damaged materials or soothing irate patrons frequently costs more than the actual material is worth. If it takes 1 hr to resolve a lost DVD that costs \$9.99, some library(ies) just lost between \$5-\$40 depending on the pay grades of the staff involved.
 - c. Take patron AND staff privacy into account**—Be aware of whom you are emailing/Teamsing and what you include. Remember email and texts sent are public records.
 - d. Golden Rule** – still good advice for any work environment. Assume good intentions. Give grace & forgiveness to your colleagues as well as your patrons.
- 2) Barcoding review**
 - a. No punctuation in 020 field
 - b. Don’t be surprised by |z
 - c. New Item Cat2 TWEEN coming soon!
 - d. Item Cat 5
 - 3) Patron Record Review**
 - a. Use Red X to remove bad patron email
 - 4) Graphic Novels/Series vs Serial:** -- Update
 - a. Series volumes with subtitles get their own title record. Series volumes with only numbers do not.
 - b. Volume analytics will help.
 - c. Catalog now allows for volume level hold. IF there is a |z analytic for a volume, and IF the patron selects a volume when placing the hold, only that volume with fulfill the hold.
 - 5) Volumes!!**
 - a. We will be retro volumizing records eventually.
 - b. System will auto recognize V. Vol. etc
 - c. Let’s agree on vocabulary: V. v. Vol vol vol. Vol. etc.
 - i. The recommendation is “v.”—lowercase, period, no space.

UNCOMMON WORKFLOWS:

6) Set Items Missing, Lost, Damaged, etc.

- a. Set Missing: 3Special Toolbar→Mark Item Missing
 - i. Also, specific button w/in Onshelf Holds Wizard
 - ii. Run Missing reports to try and find them
- b. Damaged—DA-XX
 - i. Use the Form:
<https://extranet.winnefox.org/sites/extranet.winnefox.org/files/Damaged%20Form.doc>
X
 - ii. Bill patron. Check with owning library if damage appears to be more than \$5 worth.
- c. Withdrawn—WD-XX

7) Lost:

- a. Happens automatically at 30 days—becomes LOST-ASSUM
- b. If patron reports lost and wants to pay:
 - i. Display User → Checkouts Tab→Right-click and Mark Item Lost
 1. Auto-offers opportunity to pay or bill patron
 2. Removes item from patron record
 3. Sets Item to LOST-CLAIM
 4. Discharging restores item and cancels bill
 5. Gets removed from database at 18 mo
 6. Holds get stuck.

8) Claims Returned.

- a. Builds trust with the patron—we believe you when you say you returned it.
 - i. Removes it from patron view in Enterprise
 - ii. Remains on patron record in WorkFlows
- b. Tell Patron how it works—they will eventually get billed if doesn't show up, BUT we really look for it!!
- c. Run Reports – details later
- d. Bill Patron (or not) -- BILLCMRET
- e. How to clear counters.
- f. Don't just renew indefinitely. That only delays issue and unnaturally inflates circ.

9) Item Not Charged Errors = search for barcode/Title in Patron Notes

- a. Happens when item becomes UI
- b. Remove note from Patron Record
- c. Use Red X
- d. Clear Bill (or not)
- e. Decide whether to re-add item

Library of Things:

- 1) Lists coming soon
- 2) Toys are Things
- 3) Puzzles are Games
- 4) Questions:
 - a. WonderBooks, Launchpads, LeapPads, etc—E-READER? KIT-AV??
 - i. “Audio Device (Playaway)” Remove “(Playaway)”?
 - b. Storytime bags? – BOOKS or KIT-AV?
 - c. Take-n-make? – THING or KIT-AV?
- 5) Remember Cat 5
- 6) Other Questions?

BLUECloud Analytics Subscriptions(and other BCA as time permits):

- 7) Where to find them
- 8) How to unsubscribe
- 9) How to subscribe to
 - a. MISSHOLD – Run weekly, to check for items that went missing from the Hold Shelf.
 - b. CLAIMS RET – Run weekly and monthly, for items marked Claims Returned.
 - c. MISSING – Run monthly, for items marked Missing.
 - d. DAMAGED – Run monthly, for items marked Damaged.
 - e. Renew User – Run monthly, for users registered in the last month.
 - f. Registered Online – Run monthly, for users registered online