ALL-WALS Agenda Outline

Ripon’s Public Library

March29th, 2016

**9:00 – Coffee & Conversation**

**10:30-12:00 – The Rest of the Meeting**

1. **Recap/Update from Sept 29th 2015:**

Placing Holds when all copies are LH. A couple of options:

* 1. Place a title hold and tell the patron to be patient.
  2. Order your own copy. Place a title hold and tell the patron to be patient.
  3. Call the library in question and ask them if they are willing to place the hold for your patron at their Workflows station and change the pickup library to your library.
  4. Call Kathy Grace and ask her to put a Winnefox ON-ORDER copy on the record. Place a title hold and tell the patron to be patient.

**UPDATE--There is now the option of ONORDER-LH item type.** This allows your patrons to place holds on your library’s ON-Order copies w/o them getting stuck on hold.

Do not place an item specific hold on the Winnefox ON-ORDER copy.

1. **Pharos Again.** Pete has set up a 2nd Pharos server with the same setting as the original server—ie, will stop BLOCKED patrons (whether they owe $$ or Expired card, whatever). If you want to switch your library (or just a couple of stations in your library), let Pete know.

UPDATE – Markesan’s board has decided to discontinue using Pharos. Do we still need a 2nd server?

1. **System Users**—There are a lot of “user records” in the system that are NOT patrons—they are users that the system requires to run, and are NOT to be used for anything ever. These are users that have names like “NEENAH Technical Services” or “BERLIN Circulation” or “WINNECONNE Public User” or have IDs like OMROPUB, or ME-HOLDS.
2. **Home Location is for an item’s Location –** It is used to tell the patron where in your library to look for the item. So, if you inter-shelve your JBK-N-CDs in your Picture Book section, give those items a Home Location of JPICTURE. If your “learn a foreign language” CDs are in your non-fiction section, give them a Home Location of NONFICTION.

Previous practice was to add whatever new Home Location a library wanted without much thought because it was relatively easy to do. We now have over 400 Home Locations. Many are almost empty, or only have about 10 items in that location. We also have some that are nearly identical.

This multiplicity of Home Locs makes it harder for the folks doing the barcoding to select the correct value, it increases the likelihood of mistakes, and it doesn’t really help the patron find the item. It might help the staff know where the item goes when shelving; but helping the few staff at your library which know your collection the best, is superseded by the many other staff at many other libraries having to wade through the long list. When there are enough items in a collection so that the collection needs its own space, or when multiple libraries need a similar collection, then we can think about creating a new Home Location.

1. **Discard vs Withdrawn** – DISCARD is a current location set by the system as part of the semi-annual maintenance reports. No library should ever use the DISCARD location for anything. WITHDRAWN is a current location assigned when someone checks the item out to their library’s WD user. No one should ever change an item’s location to WITHDRAWN manually.
2. **MISSHOLD vs MISSING** – The MISSHOLD report gets run every Wednesday for items that are missing from the Holds shelf for more than 6 weeks. These are items that would have been on your Clean Holds Shelf report (because the patron either canceled the hold or never picked them up), but you couldn’t find them to clear them. MISSING is for everything else that goes AWOL.



1. **Please remind staff to sign/date notes, emails** – We get emails from “Oshkosh Information Desk” or “Menasha Reference” but without a name. It makes it hard for us at WALS to follow up if we don’t know whom to contact. Same goes for notes on materials being shipped between libraries, and notes put in the patron record. Initials aren’t always enough—esp. in notes that get seen by staff at other libraries. “LD” could be Linda DeNell from GreenLake, but it might just as easily be Lori DeHaan from Oakfield, or Linda DeCramer from Ripon.
2. **Please send as much info as possible**—Barcodes, ***Barcodes*,** Barcodes! Patron Name, Titles, call nums, descriptions are all helpful also**. *Dates***are great! Date weirdness occurred, Last Activity Date, Date that you called…***Screenshots****!* A picture is worth 1,000 words….
3. **Err on the side of restraint** –when modifying other library’s patrons, items, holds, etc. When in doubt, call the library and ask.
4. **‘Fess up quickly** – There will be reassurance and forgiveness for “oops, I goofed! –I just overwrote someone else’s copy.” There might be an uncomfortable silence after “I accidentally overwrote someone else’s copy yesterday and then tried to fix it, but today both copies are gone.”
5. **Talk it out amongst yourselves** – If another library does something that you think they shouldn’t—talk to them directly. I can bring up specific issues at these meetings when there are widespread problems that affect everyone. But individual cases of “Library X did something I don’t think they should to one of my patrons/items” should be resolved between you and the offending library.

 Is Good!

1. **Upgrade:**
   1. **Font Size Changes!** If you go to Preferences🡪Desktop🡪Font Settings, you can set the Menu text (which does the top and side menus) and set the Window text (which does the main part of the screen). Be aware that if you enlarge the font size you will need to scroll and re-size windows and pop-ups more.
   2. **Call Number column** displays in Checkout List in Display User Wizard.
   3. **Change Display Library Helper** – Allows you to view only copies from a specific library.
   4. **Number of copies in Hitlist** – in WorkFlows. How many copies are owned system-wide. If exactly 30, odds are it’s an e-resource.
   5. **Partial Payment of Bills in Cash Management**—Can add 1 or all of patron bills to transaction. Can Edit Transaction to be able to pay part of one bill.
   6. **Patron Weirdness** – Handout. Old data from when we migrated from DRA to Sirsi in 2004 is now displaying. Do we need to keep Previous/ALT/Inactive IDs?
2. **Upcoming Maintenance** – Will happen by April 15th. This will remove a lot of the titles and copies that are now showing in the catalog as WITHDRAWN.
3. **Collections weirdness** – There have been occasional reports of a patron remaining in COLLECTIONS status even though they paid off their original bills, fines, and referral fees that sent them to Collection.

As best as we can determine, this happens when the patron still has some fines on their account, possibly from new overdue materials. We have found that for the Collection status to be cleared, the patron’s account must be entirely paid off, having no fines.

The best way to handle this, if the patron isn’t blocked for other reasons, is to enter the standard override to checkout to them. Or, you may cancel the outstanding fines which will clear the Collection status. If necessary, you can always add the fines back later.

Either way, when the account shows a balance of $0, close the user, then reopen their account (possibly waiting about 5-15 minutes beforehand), and the collection status will be cleared.