ALL-WALS Agenda With Notes
Ripon Public Library
October 30th, 2018

9:00 – 9:15 Coffee & Conversation

9:15-9:30 – Introductions, Old Business

- **Closed Date Calendars** – Please fill out the calendar with what dates you will be closed in 2019 and return it to Melissa before the end of the year. Note that this is when *Workflows* considers you closed, not if your front door is locked; setting your library closed on a date has items not due on that date, and the send list not run for your library.

- **Notes on Patrons and Items** - Remember when you enter *any* note, sign it! Use "XX firstname lastinitial mm/dd/yy", where XX is your library code (the standard two digits we use to distinguish your library in reports: BE, OS, WN, etc). Example: OS Becky S 10/15/18

- **List Features in Catalog**- Remember that you can create and save a list even if you're not logged in when you find the items. Simply check the box next to the item(s) you want to save and choose the "Add to My List" action. The items are saved to a Temporary List; you can find this Temporary List by going up to the header and clicking on "My Lists". To the left of the list of items, you'll see a green "Log in" button. Once logged in, you can use the "Select an Action" dropdown to save the Temporary List.

9:30-10:00 – Reminders and Previews

- **Email Phishing** – Pete says, never trust your email! …Well, okay, not quite. However, we have noticed a lot of phishing emails that have wiggled through the filters into inboxes. Remember, be skeptical about emails that make urgent-sounding claims, particularly about email storage or messages. You can mouse over a link BEFORE clicking on it to see where the hover-text says its going. If you have any doubts, check with Pete BEFORE clicking. (If you would like a more detailed talk for your staff on best practices, contact Pete; he's willing to come out and give a more in-depth presentation).

- **Last Available Copy, With Holds** – Suppose one of your patrons has a hold on a title, and you find that the last copy, owned by a different library, which could have filled the hold has become permanently unavailable: set to MISSING, WITHDRAWN, long overdue, etc.

What's the policy that should be followed? Is this a time to contact the owning library of the last copy to get them to reorder the book? Or should the library leave that decision to the owning library, and instead contact their patron who has the hold to see if they want to ILL the title instead? Or, should the library take it on themselves to order a copy, whether or not they purchased a copy of the item initially? And, if the library orders a copy, should they place it on Local Hold, following their policies for new books, or set it to float freely, as it is the only copy that could fill outstanding holds and might not be a "new" book? What would be the best practice in this situation, and is that something that can be set as a system-wide policy?

> Add 10/31/2018: Discussion at All-WALS agreed that best policy would be for whichever library who notices the problem to contact the patron about removing or changing the hold, or the library of the patron if the hold is not for one of your patrons. Optionally, contact the owning library (if the item is not yours) to see if the item should be re-ordered.

- **Catalog New Features** (demo) – We've added two new features to the catalog this past month or so:
  - Item Details Tabbed: Instead of the Holding table, Summary, Reviews, and other information about the title being stacked atop of each other (so patrons looking at a title that has many copies might not realize there is other information about the title available), those tabs of information are lined up next to each other:

Available:0	Summary	Reviews 1	Related Resources			
Library	Call Number	Location	Holdable	Status	Item Holds
Oshkosh	823 T649m	Adult New Nonfiction	Holds Allowed	Due 11/1/18	Hold Specific Copy

  - Related Resources: A new tab of information displaying on the item details, this tab shows other related items in your library in a mini carousel of book covers, randomly sorted. "Related" is based off items that your library owns that have the same author, subject, or series heading:
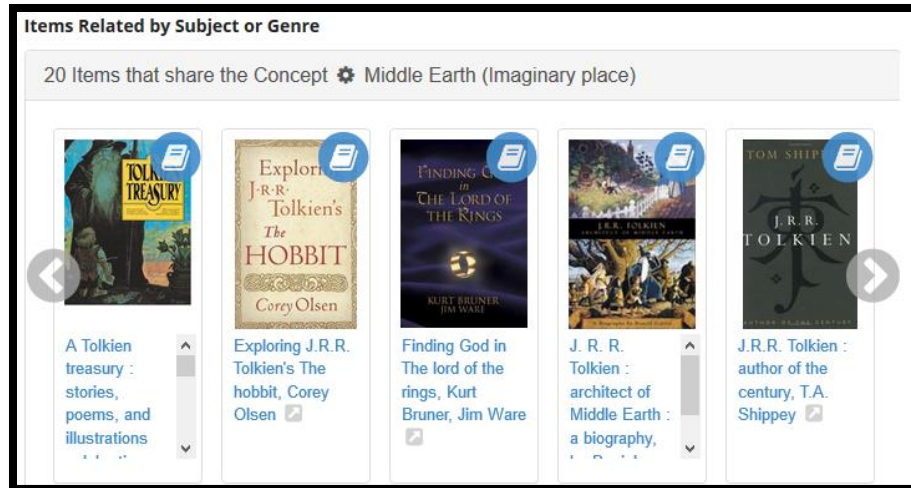
This allows patrons to find additional items they might be interested in, without having to do a separate search. Clicking on the title takes them directly to the item's page, to locate in the library or place on hold.

The blue circle in the upper right-corner indicates what kind of item it is, with separate icons for books, movies, audiobooks, and online resources. Hovering over the icon has text popping up to identify the format.

Basically, this is similar to Novelist's Readalikes, but based off information already in the items record, and guaranteed to be present in the patron's own library.

- **Special preview: "BLUEcloud Circulation"** (demo) – This is the intended and eventual replacement for Workflows. It is still very much in the preliminary phases of development, however, there are situations where it could be useful now.

  We are not in a rush to move to BLUEcloud Circ; no one is required to use or even try it. However, we did want to show you a bit of how it looks and what it can do, as it is the "shiny new thing". If you want to try it, let us know, as there is some back-end setup we need to do first and then some training we can do. If you don't want to try it, just keep it in the back of your mind.

10:00-10:30 – Analytics ("the new reporting software") (demo) - Analytics isn't truly a new software; monthly stats have been done in Analytics for the last year or so. However, we are now at a point where we are comfortable offering Analytics as an option for libraries to run and schedule some of their monthly maintenance reports and lists of items and users. We'll demo its abilities in the morning, then, in the afternoon, those interested can have some hands-on time with their own data in Analytics.

10:30-10:45 – BREAK

10:45-11:05 - Report/Discuss Samarbeid talks

Our discussion with OWLS is ongoing; many of you may have attended the recently held small library summit. Currently, the committee is working on a document to handle potential governance and voting.

Also, in September Winnefox compared the titles that were added in the last twelve months in each system, looking for titles that were held by both systems and titles that were unique to each system. We found that for Winnefox, roughly 50% of our 13,700 titles were also held by OWLS, and 50% were unique to Winnefox (6,926 in common and 6,774 unique). For OWLS, the percentages were different, as they added 22,440 items over the last 12 months (15,474 of the titles were unique to OWLS). What this shows is that Winnefox would gain a broader and deeper collection, with additional copies from OWLS of titles that we already own, and access to titles we do not own.

11:05-11:45 – Local Holds Discussion

Immediate background: On October 2nd, Kent Barnard suggested all libraries remove all books from Local Hold for a period of 6 months. This would allow libraries to judge what the effect would be on their items, should Winnefox decide (possibly in the context of the OWLS talks) to no longer have Local Holds.

This sparked discussion through emails which ranged from those who enthusiastically supported the suggested experiment, to those emphatically opposed. Those in support, and those who had experience in systems that do not have Local Holds, stated that patrons' holds are filled faster without Local Holds. Those opposed cite the need for their patrons to be able to browse for the items on the New Book shelf, which can't happen if their item is out filling a hold at a different library.

An additional difficulty is that all results would be purely empirical perceptions, due to the number of variables involved in determining how long a specific item takes to fill a hold (patron places hold on pre-published item, patron checks out item and keeps it overdue, item cannot be found for patron and is set MISSING, item has transit time etc). On the other hand, this experiment could work to show if the current assumption regarding not having Local Holds (items would take longer to return to their home library's New Book shelf) is correct or not.

We cannot at this meeting force any library to set their materials to not be Local Hold. The Local Hold Experiment will go forward for those libraries that want to participate in

it. This is, however, a good chance to discuss reasons why a library might want to participate, or might not want to, continuing the discussion that began in the emails.

Add 10/31/2018: Discussion at the meeting resulted in an agreement to take a formal paper vote on whether or not to go forward with the experiment. Due to the desire to begin it as soon as possible if passed (to give a baseline of results before 5 day delivery begins in January 2019), the deadline for voting was set to November 2nd.

11:45-12:00 -- Round table sharing: So, what's new at your library?

12:00-12:45 – LUNCH

12:45 - 1:00 - Anything we didn't get to before lunch, or things we want to revisit, or new business brought up during the meeting or lunch.

1:00 - ??? – Analytics Lab

There will be a refresh of the morning's demo on the basics of running reports in Analytics. Then personal logins for Analytics will be handed out for open lab time to try running and scheduling reports for your library and circumstances; stay as long as you need to get all your questions answered!