

ALL-WALS Agenda With Notes
Ripon Public Library
October 31st, 2017

9:00 – 9:15 Coffee & Conversation --

9:15 – 9:20 – Introductions, quick updates

9:20-9:50 -- **Libby: Tips, tricks – Handout.** Meet Libby and discover how easy it is for patrons to use and why they should switch now.

9:50 – 10:05 – Catalog Update

- **Need to decide about limiting online registration of minors.** We can set an age limit and prevent anyone under X years of age from registering for a temp card online. However, we have to agree on an age limit.
 - **See Survey Q #1**
- **Reset/Change PIN –Handout.** Option available in the catalog. Patron clicks a link on the login screen. System sends them an email with a link to reset PIN. We can control the PIN to be a 4 digit number if we want.
 - **See Survey Q #2**

10:05 – 10:20 – Local Holds

- **Local Holds** – I was asked to revisit the issue of Local Holds by 2 more libraries.... Apparently, Local Holds are not all that common around Wisconsin. Mark asked folks in SRLAAW about their system's practices regarding Local Holds. Of the 7 responses he's received so far, only 2 use Local Holds the way we do.

Other systems use local holds to prevent equipment or fragile materials from going into delivery; some systems use "local hold" to mean that only holds from the pick-up library fill the request; but only two use it for high demand items.

Here are some of their reasons/comments:

"Perhaps because we have a "local holds first" method for filling holds, we do have everyone putting everything (with the minor exceptions mentioned above) into a "regular holds" status. It all seems to balance out." [KS: We also have local patron priority in place]

"Our directors ultimately voted against making that switch, so we're still at "first come, first served" for holds fulfillment. The interesting thing is that it was largely the small libraries voting against, and our largest libraries voting for "local priority for holds.""

"...one of my colleagues, who likes to point out that keeping your one local copy of X new title on the shelf means one local person has access to that title. Making good use of pooled resources means it would be possible for 3 of your patrons to get X new title at the same time."

" One of our small library directors repeatedly told the story about how she processed a new John Grisham book and scanned it to check it in, only to see it captured for a hold in a different library. She said it almost killed her to put it in the bin and send it off, but she did. She said she was still feeling bad about it while processing incoming materials until she found three copies of that title in in her incoming bin. This story could raise questions about the efficacy of moving these materials all over the system, but it did assure her that her patrons would be well-served."

Of the 2 that do use Local Hold, 1 system only allows things to stay LH for 2 months, the other for 4 months.

10:20-10:30 BREAK

10:30 – 11:15 **Defense Against Malware 101: Handout.** Best Practices for Avoiding Malware

11:15 – 11:30 – **Mental Health Exercise**

- **PLSR ILL/ILS Workgroup Review** – I was asked to be on the ILS/ILL Workgroup Review Panel. So, I read all their documents, recommendations, best practices, etc. My takeaway was this: While there is clearly a contingent that believes the entire state should move to one ILS, the consensus of the group was that it wasn't practical to start with that goal, and that other states which have tried that approach mostly failed.

They are recommending forming regional ILS groups over time, encouraging mergers of existing systems and absorption of small standalone libraries into existing systems. In the meantime, the starting goal is to form a statewide Discovery Layer that all patrons can access, which will use technology to bridge the multitude of existing ILS systems out there. Thus giving time for libraries and library systems to start forming alliances on their own.

The "Desired Service Outcomes" section of the executive summary talks about "eliminating barriers to access", "equitable service," "easy access to materials," and "flexible delivery." It also talks of "*consistent policies*" which includes "standardization of circulation parameters and fines."

In light of all this, even though there is no immediate push to unify the entire state, it behooves us to keep these stated outcomes in our minds and to work towards implementing what we can, when we can. Winnefox may start having more conversations with OWLS, or Manitowoc-Calumet or other systems.

If nothing else, it is worth your thinking seriously about your library's policies, and how they "eliminate barriers to access", or promote "equitable service" even within Winnefox. What would it hurt to switch to a 28-day or 21 day loan period for your normal materials, if it made life easier for all Winnefox patrons? Is the possibility of temporarily decreased circ more important than patron goodwill? Would changing your fine rate to \$.05 for everyone or \$.10 for everyone really have a significant impact on your budget? How many dollars realistically, given that there is no guarantee that patrons would actually accrue or pay any fines at all, depending on the loan period? How long do your Local Hold materials appear on your shelves before they are checked out by the next patron who walks in?

As an exercise in flexible thinking...do Survey Question #4

11:30-12:00 -- **Sharing from WLA**

12:00-12:45 **LUNCH!**

12:45 – 1:00 – **Software Update**

- **New Symphony version** – has new option for limiting materials. Something for folks to think about....

Currently, we can limit by Item Type, but it is specific to each individual type. For example; Brandon has a circulation rule that has a limit of 14 items. This is the rule they use for their DVDs, DVD-LH, JDVDs, JDVD-LH, VIDEOS, VIDEO-LH, JVIDEO and JVIDEO-LH item types. However, currently, that means that a patron can have 14 of each type for a total of 56(in theory) before the system would stop the patron. The system only stops them if they try to check out the 15th regular DVD or the 15th JDVD, etc.

Software can now set limits across Circulation Rules. If we turned this on, in the example above, the patron would only be able to check out 14 DVDs or VIDEOS regardless whether they were adult or juvenile or whether they were Local Hold, etc. However, if Brandon, or some other library, was using the same rule for something else (like Playaways), they would also be included in that 14 total items limit. Also, if the patron went to some other library, they would still be able to checkout more DVDs.

Software can now set limits across Libraries by iType. If we turned this on and set it to 14, in the example above, the patron would be limited to 14 DVDs no matter where they checked out. They could still checkout an additional 14 JDVDs, plus 14 DVD-LH, etc. We'd need to agree on a max limit. We'd have to set the limit for each version of DVD item type.

*If we turned them both on...*in the example above, the patron would be limited to 14 items of anything using that rule (including Playaways), while also being limited to 14 of each type, regardless where they checked out. They still could get 14 mixed-DVD-type items using Brandon's rule, AND get 14 DVDs from Ripon, AND get 14 JDVDs from Ripon, etc.

This is another reason for standardizing our loan periods, fine rates, limits, etc. We have long wanted a way to prevent folks from gaming the system when checking out DVDs. However, having different fine rates for kids and adults, means that patrons will always be able to checkout 14 DVDs and 14 JDVDs.

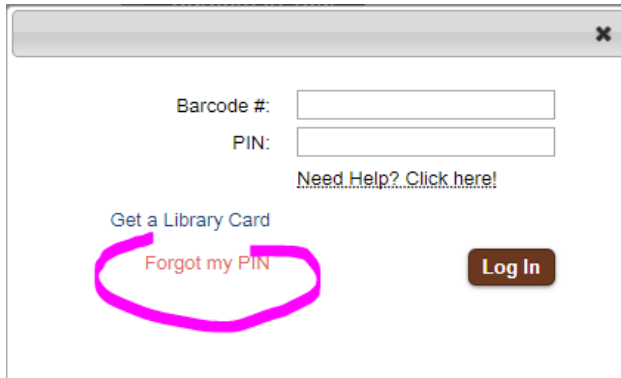
1:00-1:30 Skype: Tips, tricks. Handout.

- Many of you are already using Skype as a communication tool. Skype for Business is free and part of our Office 365 subscription. We encourage libraries to install it. In fact, we're going a step further and recommending that it be installed on all PCs—including the desk PCs. We hope to be able to use it to send out "system is going down" messages for those times when we need to reboot during the day. Installing Skype doesn't mean you have to use all the fancy stuff Melissa is demonstrating.

1:30-2:00 -- Whatever we forgot or didn't get to.....

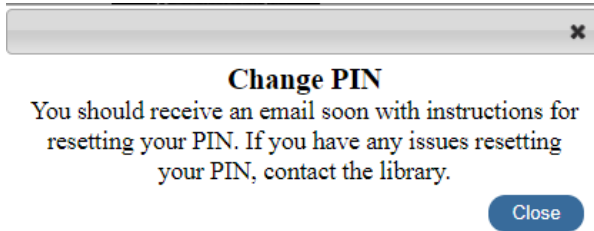
Changing/Resetting PIN in Catalog

Looks like this:



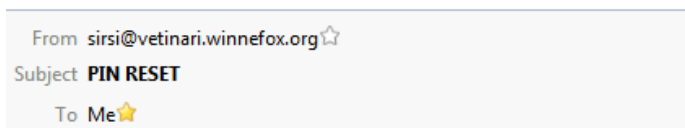
A screenshot of a web form for logging in. It features two input fields: 'Barcode #' and 'PIN:'. Below these fields is a link that says 'Need Help? Click here!'. To the left of the 'Log In' button, there is a link that says 'Forgot my PIN', which is circled in pink. Above the 'Forgot my PIN' link is the text 'Get a Library Card'. The 'Log In' button is a dark brown button with white text.

Which takes you to:



A screenshot of a dialog box titled 'Change PIN'. The text inside reads: 'You should receive an email soon with instructions for resetting your PIN. If you have any issues resetting your PIN, contact the library.' At the bottom right of the dialog box is a blue button labeled 'Close'.

Which looks like:



A screenshot of an email header. It shows the sender as 'From sirsi@vetinari.winnefox.org' with a star icon. The subject is 'Subject PIN RESET' and the recipient is 'To Me' with a star icon.

Please follow this link to [reset your PIN](#).
If you did not request a changed PIN, disregard this email.
From,

Winnefox Library System

Which take you to the catalog which prompts:



A screenshot of a catalog login form. The 'Barcode #' field is pre-filled with '1000200356904'. The 'New PIN:' field contains four black dots. The 'Confirm New PIN:' field contains four black dots. At the bottom are two dark brown buttons: 'Update' and 'Cancel'.