

Minutes to the ASC Meeting July 21 2015

This Meeting was called to go over the presentation “Best Practices in Holds Fulfillment.” Jason Boland from III made it by Screencast in June:

<http://www.screencast.com/t/ORzm9VKP>

Our Priority Paging is done through Load Balancing. Larger Libraries are on top of the queue as they have more staff to handle holds. Load Balancing was engineered to minimize the courier cost.

Marmot has Agency Holds turned on.

Tools to ensure Holds are filled:

- The Outstanding Holds Report should be run regularly to make sure that holds are not getting stuck. That being said, there used to be a bug where holds placed on single-item bib never triggered. Please run your report and let us know if you see instances of that. This report allows us to move holds to records where we own a copy. Note: if patrons are not logged in prior to placing a hold, Pika is not in a position to choose the bib where their Home library owns a copy.
- Clear Holdshelf. Some libraries like Englewood have such an extensive Holdshelf that they HAVE to use it. Most Marmots use it.
- The High Demand Holds Report is used as a Collection Development tool. The thresholds are set per Library: Brandon will post them on the Wiki. In fact, Brandon will post ALL options on the Wiki.
- Holdable/Non Holdable: Brandon is working on a more user-friendly access to the Sierra tables to get an understanding of loan rules.

Brandon, Mary Katherine and Tammy followed up the webinar by a Holds Consulting session with Jason Boland. Here are the highlights:

A hold is “trapped” for 24 hours if the patron’s library has a copy on the shelf. The hold moves to the next page-able library the next day at 5am, starting with the library’s branches. BUT if a copy gets checked-in anywhere in Marmotland, that triggers the hold. This is a sour point between Marmot and III!

When checking-in an item with a hold, we used to be prompted “check-in and send in Transit”, “check-in and place on Holdshelf” or “check-in and do not fulfill hold.” We had a lot of patrons coming to pick up items that were still in transit because staff picked the second choice by mistake. So, Jason made the appropriate change to remove that choice.

Before Mobius, we had a lot of p-types. This allowed us to fine-tune which of our collections were holdable by whom. With the contraction of p-Types, we are more limited to fine-tune what is holdable by p-Type. We still have a number of p_Types available and maybe a discussion needs to take place at the directors’ level to create new p_Types to ensure that certain collections are not sent on PPH.

There are a number of p_Codes (not p_Types!) that can be used in Decision Center to allow for more granularity in Statistics. We are scheduling a meeting especially to discuss how to make the most of p_Codes. Brandon sent a Doodle to schedule the latter.

Another change Jason made is to the Holds Pickup Notices. They are now generated by the OWNING library rather than the borrowing library. If you wish to fine-tune YOUR Holds Pick-up Notice, let Brandon know.