

SWAN Clarity Task Force

Agenda

Wednesday, August 14, 2019, 10:00 a.m. – 12:30 p.m.

SWAN Headquarters
800 Quail Ridge Dr
Westmont, IL 60559

1. Introductions & Welcome
2. Review Notes from July 10, 2019 Meeting (Exhibit pgs. 3-8)
3. Gathering Information: using user experience methodologies
 - a. Feedback on the Journaling Process
 - b. Update on Time Study (Exhibit pgs. 9-13)
 - c. Update on Interviews Completed (Exhibit pgs. 14-19)
 - d. Update on Scheduled Focus Groups (Exhibit pgs. 20-22)
4. Discussion on Holds
 - a. SWAN's Demand Management Configuration & Testing Plan (Exhibit pgs.23-32)
 - b. Review feedback from April 3, 2019 Clarity Meeting (refer to [online notes](#))
What do your colleagues throughout the library most complain about in relation to SWAN?
 - i. WorkFlows is confusing, how to place holds
 - ii. Not all new titles available for holds is a huge patron frustration
 - c. Patron complaints related to SWAN services, software, etc.
 - i. Local complaints about holds notification — it is constant, low-level problem.
 - ii. Patron confusion on Enterprise when placing holds on a new item that is restricted and does not allow a hold to be placed on it by a member library.
5. Discussion on Clarity Findings Report: outline and assignments
6. Next meeting: Wednesday, September 11 (10-12:30) –
<https://www.librarylearning.info/events/?eventID=28766>

Task Force Membership:

- Kerry Halter, Technical Services Manager, Batavia Public Library District
khalter@batvaiapubliclibrary.org
- Kristina Howard, Adult Reference Manager, Tinley Park Public Library
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- Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
- Amy Prechel, Head of Access Services, Downers Grove Public Library
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- Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library
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- Ahren Sievers, Reference Technology Librarian, Elmwood Park Public Library
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- Colleen White, Cataloging Librarian, Oak Park Public Library
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SWAN Staff:

- Dawne Tortorella, Assistant Director, Chair
- Aaron Skog, Executive Director
- Scott Brandwein, Bibliographic Services Manager
- Steven Schle Witt, Information Technology and Support Services Manager
- Tara Wood, User Experience Manager

SWAN Clarity Task Force

Notes

Wednesday, July 10, 2019, 10:00 a.m. – 12:30 p.m.

Introductions & Welcome

Task Force Membership:

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khalter@batvaiapubliclibrary.org
2. Kristina Howard, Adult Reference Manager, Tinley Park Public Library
khoward@tplibrary.org
3. Michelle Kurczak, Head of Youth and Young Adult Services, Messenger Public Library of North Aurora, MKurczak@messengerpl.org
4. Cindy Maiello Gluecklich, Director, Melrose Park Public Library
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5. Amy Prechel, Head of Access Services, Downers Grove Public Library
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6. Angela Romano, Fiction and Reference Librarian, Oak Lawn Public Library
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Review Notes from June 5, 2019 Meeting

No changes, the notes were posted a week after the June meeting.

Plan for Gathering Insight: Screen Recordings, Journaling, Focus Groups, Interviews

Determining the reason for discontent and unhappiness within WorkFlows and various modules requires ways for SWAN to determine concrete problems and find solutions. Dawne asked the Task Force to comment on the concerns with the methodologies shared in the Clarity Task Force.

Downers Grove Comments:

Amy Prechel shared the outline of the Clarity study with the library management team. The initial concern was around the screen recording and patron privacy, particularly with the software recording/capturing patron checkouts. The use of journals/diaries was also questioned, as their purpose was not entirely understood.

Elmwood Park Comments:

Ahren Sievers said there was no problem with circulation staff in completing the recordings. They understood the recording software would only record WorkFlows activity. The journaling will be most useful in allowing library staff to note the frustrations they encounter.

Ahren noted that the recording could also point out “false positives” such as a Topaz signature pad issue, which can help identify what is a local issue, e.g. a software driver installed on a Windows OS version, versus a true SWAN issue with the WorkFlows.

Technical services staff are also ready to participate and journal for Clarity. Recent internal documentation work shows that the steps needed to complete tasks are long, resulting in lengthy documentation (35 pages and longer).

Oak Lawn Comments:

Angela Romano shared there was no concern on the recording, the circulation manager is on board with the idea. Angela is supportive of the study, in that “You cannot just say “Sirsi is terrible” and not provide the reasons why.”

Batavia Comments:

Kerry Halter shared that some of the backroom circulation functions that are more in depth mean we should consider the location of the recording software. At Batavia, the youth services team often complains the most about Symphony and Enterprise, which Kerry noted is the opportunity to get their input and voices heard.

Melrose Comments:

Cindy noted that various desks at Melrose will tackle placing holds or processing holds, so this is not always the circulation desk. She recommended Clarity representatives be empowered to determine ideal locations within their library to conduct the study.

Messenger Comments:

Michelle Kurczak shared some resistance within Messenger on having the time to complete this activity, where staff have problems tallying other activities related to routine library functions (tally sheets, etc.). Summer reading was raised as the busiest time.

Tinley Park Comments

Kristina Howard shared that the Tinley cataloging department would like to help, but the initial draft of activity does not capture their concerns.

Conclusions

- Dawne will help Clarity reps explain how we will protect privacy of patrons within this activity.
- We need an introduction that explains the purpose of this activities, so we find the things that are most frustrating to staff.
- We need to detail the journaling purpose and answer the question, “where did you encounter a frustrating moment with a patron?”
- Technical services/cataloging staff will need a journaling activity.
- This activity initially will only be for Clarity Task Force libraries, which means 8 libraries will have a key role in helping create solutions.
- Journaling activity for Clarity reps needs to be explained in depth so they can explain this to those staff involved at the 8 libraries.

Is there a negativity at a library leadership level? Does this require Aaron to work with library directors in some way to set a tone and problem solving required? That the director needs to set with managers that this will result in improving software and services through SWAN?

Journaling Discussion

Discussion around the journaling

- Are we targeting circulation only?
- Do these questions make sense?
- With two journals, could it be divided between 2 staff for 2 weeks?
- Are people emotional about this and SirsiDynix? Is this a memorable issue, annoying issue, or along the lines of “I feel like a failure” because I didn’t know what to do?

There is some intentional vagueness within the purpose of the journaling, so we do not prescribe ahead of time what we are attempting to capture.

The goal is to write down an interaction with a patron that involves the software, good or bad, and what did this mean to the staff person within that situation.

There are some concerns about having to explain this to staff, which Tara said is normal for this type of research activity. There is always apprehension at first, but staff will get over this.

Examples of personas for journaling

Ana: Adult/Young Adult Librarian, with MLS degree, on a service desk 8-10 hours per week and are a manager. This desk is dedicated to AV activities.

Bianca: Circulation staff scheduled part-time with desk time and back house time in rotation.

Maxwell: technical Services staff that is part-time involved in acquisitions and cataloging. They work primarily in the back of the house.

- Real-time journaling after patron activities
- Date and staff initials
- Interpret the questions or decide not to answer it if it does not apply

Example Journal

"I am in WorkFlows performing acquisition activities, I am looking at an EDI retrieve report. I use the find "error" text binocular function to see the "Errors occurred while retrieving files in BWIBOOK." I look at my finished reports, I look at the errors within these reports. Maybe I should do a support ticket, should I live with it? It frustrates me. I do not know what to do next."

Write down date & time. This could be 3-4 days in tech, a few days in youth services, a few more days with circulation staff.

Recording Screen Activity

The focus initially should be with circulation staff, with the intention to expand this to other areas.

Avoid having 3 circulation computers for 10 minutes recording.

Clarity reps described a segmented approach where patron registration is at one station, check-ins at another station, etc.

The desire is one recording to help collect a busy terminal with a lot of activity.

Suggested Recording Times Discussion

Synchronized time benefits—if there is a problem at the same time at every library, this could capture it. But is this the issue we are trying to capture? The variability across the consortium would be reduced.

Is 10 minutes too long? Reps thought it was almost too short!

The week of July 23rd date is good for the majority of Clarity, with perhaps Tinley due to a circulation manager vacation.

The goal is to be "minimally invasive."

Library Staff Interviews

Tara Wood and Crystal Vela went to Acorn and Alsip to interview circulation supervisors to conduct interviews. The expectation was we would be opening pandora's box, but the issues found were otherwise. These were specific activities such as setting closed dates and searching.

Next up is Itasca. Billing is an area that we want to zero in on later.

There will be a summary of the interviews and questions for Clarity at the next meeting.

Focus Groups Discussion (see packet page 16)

These are intended to be facilitated discussion among various functional areas. This is open to anybody but would like to see it limited to one rep per library.

The concern is this will be an “airing of grievances” or a belly ache session. The focus group would not be for the 8 Clarity libraries, but open spots could be filled later.

Will we succeed in 28 people from 28 libraries? It will depend on the timing and schedules.

Is August good to host 2 focus groups and have 2 in September? Hosting at various locations, such as 4 different will help give us a broader range. These sites were decided as the initial focus group locations.

1. Fox River: Batavia
2. South: Tinley
3. North: Oak Park
4. West: SWAN HQ

The preferred space should be for 10 people, such as a board room or medium sized space.

Mock Focus Group Discussion

Dawne walked through the focus group questions using Clarity reps as a mock test.

This will not be “SWAN heavy” so it will be 2 SWAN staff present.

Should the questions be provided ahead of time?

- Give a list of topics, but not the questions
- Allow staff to think ahead of time, but not let them predetermine answers

Clarity agreed Dawne is on the right track with the questions and facilitation.

Report on Cataloging Standards (Kerry Halter, Batavia Public Library)

The group came out of a demand for a codified rule-set that did not exist a year ago. The documentation was old, and it was only for 6 cataloging libraries. This group is much larger now, with 18 libraries, so the starting point of the discussion with the full group required a smaller set of cataloging staff to review the standards. The approach is to reexamine everything, rather than use the precedent of prior rules and standards.

This group has started out going through MARC records and discussing which areas of the tags need some consensus on what to do. This is a start on where there are issues and how to solve them.

One issue as an example is the indexing of ISBN and UPC numbers.

Online Forums and Cataloging group (Scott Brandwein, SWAN Bibliographic Services Manager)

Using this smaller standards group, SWAN is trying out a Community Forums based on the software Discourse.

SWANx19: What is BLUEcloud?

There will be a SWAN presentation on this topic, which originated in an overview from the first Clarity meeting.

Role for Clarity Task Force members to seek input/network

Is there a role for the Clarity Task Force members to have at the event? Two reps could sit at a table. Perhaps a poster session. A bowl of candy.

Some of the Clarity staff are on vacation during the event.

Next meeting: Wednesday, August 14 (10-12:30)

Preliminary Analysis – Time Studies of Circulation Use of WorkFlows

Overview

Purpose

This phase of the data collection and analysis requested a series of time studies in WorkFlows, captured at the Circulation desk.

The following instructions were provided to the participants:

This independent capture of WorkFlows activity will allow us to determine exactly what features of the software are most accessed and the efficiency of that work process. It will help identify areas where finding information of completing actions could be improved. It will reinforce potential differences in periods of the day and at libraries, providing a range of activity patterns to observe. We may also uncover areas where additional training or configuration of the interface could be helpful. With time studies, it is helpful to have a specific day/time for capture of screen recordings. This provides an opportunity to see a cross section of activity across multiple libraries within the same period – enabling record of both commonalities and uniqueness.

Timeline for Data Capture

During the week of July 15th, Clarity members will be asked to help create screen captures at one Circulation Desk during the following time periods:

- Tuesday, July 16, 10:00 AM – 10:10 AM
- Wednesday, July 17, 12:30 PM – 12:40 PM
- Thursday, July 18, 6:15 PM – 6:25 PM
- Friday, July 19, 3:45 PM – 3:55 PM

Libraries were instructed:

If your library is not open during one of these times, or no activity is recorded, simply indicate that when submitting transmission files. This work is not intended to be exhaustive across all circulation work stations, but rather reflective of a typical use case.

Participation

Six libraries participated in the study for a total of 23 recordings for analysis. The Clarity Task Force members uploaded recordings to a shared personal folder on the team-based SharePoint project site. These recordings were immediately downloaded to a secure internal storage and removed from the team site to protect privacy.

Data was analyzed for functional activity with no recording of specific barcodes, either items or users. Functional processes were codified for consistent reporting and comparison. All data was collected and made anonymous without reference to the specific library. Libraries were codified by random selection of color identifiers.

Findings

Summary of Activity

Data was analyzed from six libraries, representing 23 sessions. The data was analyzed as a composite set and not broken down by library.

Primary functional activities identified included:

- Discharge/Checkin
- Checkout
- User Lookup and Modification
- Onshelf Holds Lookup
- Bill Payment
- Item Search

The following table provides total and average time/activities recorded.

Average Time on Task:

- Active (performing a task) – 3:06 (3 minutes, 6 seconds)
- Idle (screen static at last state) – 6:54 (6 minutes, 54 seconds)
- Approximately 1/3rd of capture time functional operation was in progress

Average number of processes during session (note this is not the number of checkouts or checkins of items, but rather the activation of the functional task and all the associated items involved in that sequential process):

- Average processes per session – 4.3
- Discharge/Checkin – 1.35 (31%)
- Checkouts – 1.17 (27%)
- User lookup/modification – 1.17 (27%)
- Ohshelf holds lookup – 0.35 (8%)
- Item Search and Display – 0.13 (3%)
- Bill payment – 0.09 (2%)

While we did not analyze each task sequence separating, we did capture the time from start of Checkout transaction until completion. This correlates to a patron interaction where efficiency of the application software is critical.

- Number of Checkout transactions (represents number of patrons helped) – 28
- Average of all checkout transaction sequence per patron – 39 seconds
- Average per patron (no alerts) – 17 seconds
- Average per patron (alert – delinquent) – 49 seconds
- Average per patron (alert – holds available) – 59 seconds
- Average per patron (Chicago PL patron) – 84 seconds

Our sample showed that the checkout process is efficient and patrons on average are helped from start to finish in less than 40 seconds. If no alerts or issued, that time to complete falls to under 20 seconds.

The only checkout that took more than 1 minute was for an external reciprocal borrower where additional verification of patron record and potential lookup at the patron's home library is required.

Process Evaluation

This process of data analysis proved to be effective in showing interaction with a critical application within the SWAN Library Services Platform. As hoped, we were able to determine time-on-task for specific functional tasks that are part of a common circulation desk activity.

Participants indicated that data collection was not a difficult or time-consuming process and use of the recorded selected, activated via the Chrome web browser, did not present installation issues.

For 10 minutes of recorded activity, it takes approximately 20-30 minutes to codify the activity. More active sessions obviously take longer. This process did enable us to create a coding system that can be replicated and expanded for future analysis.

Codified Data Analysis

To understand the process of data collection, the following sample represents how information was codified and analyzed in the recordings. Start time of each transaction was logged. Time on task was calculated (Time of last step in transaction – Time of first step in transaction).

Time	Menu			Total Time in Tasks	Idle
				2:26	7:34
2:16	Circulation >Charge/Checkout			0:28	
2:18		scan user barcode			
2:20		alert - holds available > OK	shows inactive ID in alert		
2:39		scan item barcode			
2:44		close			
5:22	Circulation >Charge/Checkout			0:37	
5:23		scan user barcode			
5:37		scan item barcode			
5:44		scan item barcode			
5:49		scan item barcode			
5:55		email current chekcouts receipt			
5:59		close			
10:35	Circulation >Charge/Checkout			0:23	
10:38		scan user barcode			
10:39		alert - user deliquent	shows amount owed and notes (DL# NEEDS INPUTTING IN RECORD.		
10:44		check out to user			
10:50		scan item barcode			
10:58		close			
11:02	User > Modify User			0:58	
11:03		click on current patron			
11:05		Basic Info			

Observations

When extending this exercise in the future, a participation statement should be signed which indicates understanding of the process and purpose of the activity logging. Some activity logged in the sample did not appear linked to actual service-related activities (e.g. checking in items that were not checked out). Without detailed investigation it would be difficult to identify the purpose of these activities. They were included in this observational study.

- The following observations were noted which may highlight a need for more standardized procedures across the SWAN membership, additional training, and sharing of common practice amongst members.
- One library updates patron record with driver's license number. This is scanned and used as an alternate id. What security concerns does this raise collecting this information in the SWAN database?
- Observed delays between scanning and barcode and entry of that barcode point to difference settings in barcode scanners – some send an automated carriage return, others not. While this is a library choice and can be set based on library preference, have we properly compared/contrasted difference for the membership to evaluate the appropriate settings for their library?
- Popup alert screens related to transits/holds on the Discharge/Checkin screen appear disabled for all libraries. SWAN trains people to “read all the screens” – but if a screen is not displayed, how are staff determining where/how to route items? Could this lack of Route To screen be related to Missing In Transit items?
- Many checkins were for items already checked in. Are libraries doing a double check-in before shelving?
- When re-registering a patron from another library, any additional features activated by their home library (e.g. Outreach, User Groups) is automatically turned on for their record, even if the new library does not use those features of the software.

Conclusion

The data gathering was a straight-forward and easily replicable activity. While data analysis can take some time, targeted key functional analysis can provide much insight.

This data collection method should be examined in other targeted work processes including cataloging and placement of holds.

Activity Log by Library

Identity Code	Session	Active			Functional Task					
		Minutes	Idle	Processes	Checkout	User	Checkin	Pay bills	Item search	Onshelf Holds
blue	1	48	552	4		1	2			1
blue	2	217	383	7	3	2	2			
blue	3	189	411	6	1	4	1			
blue	4	59	541	2		1	1			
green	1	267	333	7	1	4	1	1		
green	2	354	246	5	1	2	2	0		
green	3	126	474	4	1	2		1		
orange	1	352	248	4	1		3			
orange	2	409	191	5	2		3			
orange	3	456	144	6	3		3			
orange	4	81	519	2	1		1			
purple	1	146	454	4	3	1				
purple	2	104	496	2	1		1			
purple	3	62	538	2	1				1	
purple	4	40	560	2	2					
red	1	43	557	3	1		2			
red	2	225	375	6	3	1	2			
red	3	139	461	3		3				
red	4	97	503	2			1		1	
yellow	1	270	330	4			2			2
yellow	2	144	456	10	1	3	2			3
yellow	3	263	337	7	1	3	1		1	1
yellow	4	181	419	2			1			1
		4272	9528	99	27	27	31	2	3	8
Average		185.74	414.26	4.30	1.17	1.17	1.35	0.09	0.13	0.35
		3:06	6:54							

Workflows User Research Report: Circulation Managers Interviews

Summary

In July 2019, SWAN conducted interviews with Circulation Department Heads to discover sources of dissatisfaction with the Symphony Workflows interface, as identified in the SWAN 2018 survey.

While we expected that participants would identify a large range of issues, we were surprised to find that most common tasks are working well; the participants interviewed were confident with Workflows and had positive feelings about using it in general. The issues participants noted with Workflows were minor annoyances not major problems. SWAN will be able to take several of these minor annoyances and make recommendations to SirsiDynix for interface enhancements to the patron display interface and transit information popups.

Participants also noted confusion around billing and handling damaged items. Their issues were not with Workflows as much as with the larger complexity of those processes.

Methods

Crystal Vela, SWAN UX Consultant, moderated the interviews and Tara Wood, SWAN UX Manager, took notes. Through a think-aloud protocol, participants gave step by step instructions on how to use Workflows to perform common tasks including searching and placing holds, to registering patrons and paying bills.

We conducted interviews with three participants. Three to five participants is standard:

“The first three users are very likely to encounter the most significant problems related to the tasks you’re testing[...]It’s much more important to do rounds to testing than to wring everything you can out of each round. Testing with just a few users makes it easier to do more rounds.” - Steve Krug, Rocket Surgery Made Easy

Volunteers were recruited from the Circulation User Group meeting held at RAILS on June 19th, 2019. For this research project, we sought participants that have experience with using Workflows daily to assist patrons and run daily processes. Three circulation department heads volunteered, two from south side libraries and one from a northwest side library.

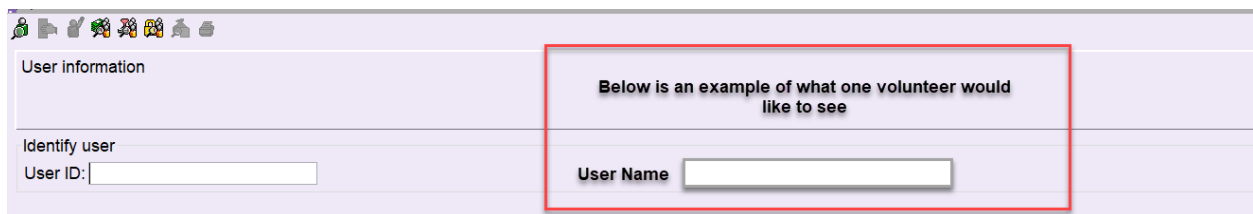
Themes

Patron Registration

Each library has a few ways of searching for a patron based on their own in-house criteria. Initially some limit their search to their library and if the patron is not found they will widen it to include all SWAN libraries.

- Search by full name
- Search by nickname
- If patron is a woman, use only first name

A library brought up that they would like to see an additional box to search by name right away as opposed to needing to go to the helper.



The screenshot shows a web interface for user management. On the left, under the heading 'User information', there is a section 'Identify user' containing a 'User ID:' label followed by a text input field. To the right of this, a red rectangular box highlights a 'User Name' label followed by another text input field. Above the 'User Name' input, inside the red box, is the text: 'Below is an example of what one volunteer would like to see'.

Other ILS Experience

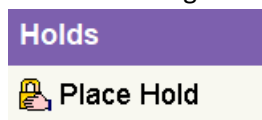
Two of our volunteers have experience with other ILS software, specifically Millennium; while one has only worked on Workflows at a few different libraries.

- It was noted that the list of patrons that recently returned items is a missed feature.

Start Search for placing holds

The volunteers demonstrated the numerous ways they would place a hold based of specific circumstances.

- Place hold straight from the Place Hold Wizard



- Use Item Search and Display wizard to search for holds
- Looks patron up first and then looks up item
- If the title is unknown, uses the Search Item Status

Search Strategies for Items

Many item searches start at the circulation desk, especially for patrons with limited mobility; however, it is also common for patrons to be sent to an adult services or reference desk for more in-depth searches. Most are asked to do title searches more often than author and topic searches. Searches also start as a basic search without limiters, although, some have expressed that they will limit to their library first to make sure they have it on shelf prior to having to place hold.

Training

With a “revolving door” of staff, frequent training in registering patrons is necessary and most challenging for one library. Billing a patron and paying a bill is challenging and they look for clarification in the circ “bible”, which is a combination of SWAN documentation and local procedures.

Feelings about Workflows

During our interviews we discovered that for the most part the feelings about Workflows are positive.

- “I like Sirsi for the most part, I think it works.”
- “It’s in my blood now.” (snaps fingers).

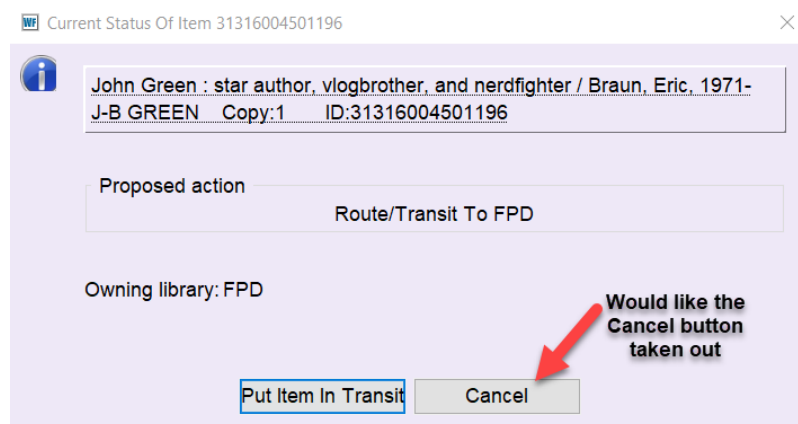
Misconceptions

A few misconceptions were uncovered, which directly affect the difficulties they find when training staff.

- Patrons always need to clear their fines before they can be re-registered at their new home library.
- Cannot use right-click/context menu options, especially for marking an item lost. “I know the wizard is the right way to go.”

The little things with Workflows: Issues & Annoyances

- Not Circulation related but would like the Serials module to be to put in price when they check in a serial all from the same screen.
- Wants a pop up in Display User and Checkout wizard when a patron is barred.
- When putting an item in-transit the cancel option should be taken away, if accidentally pressed it puts the item “on shelf” at the home library.



Damaged Philosophy, Documentation, and ILL Fears

There is a general discomfort around damaged items that were borrowed from libraries. If the item was their own, libraries seem to have a lenient policy and will not charge their patron for the damage. When the item was borrowed from another SWAN library any signs of wear and tear are heavily noted so as not to be charged by the item’s home library upon return, “We’re so paranoid here.” One library “blames SWAN” when they must charge their patron for a borrowed item that was damaged. Overall,

the Damaged and Unusable guidelines that SWAN provided were found to be very helpful and were pinned to cubicle walls.

Damaged and Unusable documentation can be found on the SWAN website:

<https://support.swanlibraries.net/documentation/64708>

Search Feelings

- Likes
 - “I don’t have a lot of difficulty searching.”
 - “I know it keeps the last item and remembers it. I love that!”

The screenshot shows a web interface for searching library items. It has sections for 'Identify User' with a 'User ID' input field, and 'Identify Item' with an 'Item ID' input field. To the right of these fields is a search history box titled '"I love that"'. This box contains a 'Current:' label followed by the text: 'The fault in our stars', 'TEEN FIC GREEN J', and '36879001140958'. The entire search history box is highlighted with a red rectangle.

- Dislikes
 - Title looking singular nouns did not always find matches. E.g. woman
 - “Why don’t all titles show up together? This irritates me.”

Things that Work

It was revealed that there are many things that our volunteers have no issues with the following tasks.

- Holds
 - Suspending/Unsuspending holds
 - Modifying a hold
 - Change pick up library
 - Canceling holds both available and unavailable
- Items on Shelf with Holds Reports (Pull List)
 - Frequency and time of day the report runs, varies between 1-3 times per day depending on staffing. The reasoning behind running it more often is to help patrons will get their items faster.
 - “I love that we can run it anytime. I love that we have that freedom.”
- Missing Items on Pull List
 - Libraries check the library for the materials and if not found they will check it out to the generic missing user. If the item is 3-4 years old, one library will assume that the item is lost and check it out to the generic discard user.
- Missing Items on Hold Shelf
 - Check on the shelf to make sure it wasn’t mis-shelved. Will call the patron to make sure the patron doesn’t have it. Will then checkout to the generic user. One library didn’t

see this happen often at all. Another library will keep track of these missing items on a spreadsheet with notes/tracking messages.

- Bills
 - No difficulty paying bills on a patron record. The right click function is from a patron record is often utilized to pay a bill on a patron record.

Contact Info	Bills	Checkouts	Holds	Routing	Bookings	Outreach	Suspension	Charge History	Us
Reason		Owes		Billed		Date			
ADMINFEE		\$2.00		\$2.00					

Change Item ID

Display Item

Edit Bill Note

Edit Item Note

Pay Bill

Place Hold

Using a right click within Display User Wizard, under the Bills tab.

Appendix

Interview Script: Workflows Circulation Functions

Introduction

Hello, my name is Crystal a UX Consultant for SWAN and this is Tara the UX Manager at SWAN. We are here to better understand how you use Workflows for your everyday work in Circulation. I estimate that this interview will take up to an hour. During this time, we will go over some questions and I will ask you to show us some of our process is in Workflows as well. I will ask the questions and Tara will be taking notes. We would like you to treat us as if you're responsible for training us; we are here to learn. Just a few things before we begin. We would like you to know that to the extent possible, we will take your comments to be confidential. We will take both your comments and other interviewees and compile them without names. Also, this interview is entirely voluntary on your part. If for any reason you would like to stop, please let me know. We can end the interview.

Do you have any questions for me?

We are going to proceed now.

Warm-Up Questions

- Tell me about your role in the library.
- How did you come to be in this role?
- What ILS's have you worked with—like Symphony, Horizon, Millennium?

Questions

1. Tell us about the last time you had difficulty searching for an item for a patron
 - a. How did you search? What information did you have about the item?
 - b. What limiters or facets did you use?
 - c. How often do you find yourself searching for a topic, vs. A title, vs. An author? Etc.
2. Placing holds
 - a. What is your first step when a patron comes up and wants to place a hold on an item?
 - b. Walk us through your process in Workflows.
 - c. "Becoming" By: Michelle Obama
 - d. How would you change the pickup library for a patron?
 - e. How would you suspend the hold for them?
 - f. How would you cancel a hold?
 - g. How would you cancel an available hold?
3. Talk about process running the pull list and handling missing items
 - a. What times of day do you run the pull list? How frequently do you run it?
 - b. What do you do when you can't find the item on the shelf?
4. Talk about process handling damaged items
 - a. Items from your library for your patron
 - b. Items from another library for your patron
5. Billing a patron and paying for an item
 - a. Items from your library for your patron
 - b. Items from another library for your patron
6. Talk about what you do with items that are not on your clean holdshelf report?
7. Registering new patrons
 - a. Tell us step by step how would go about registering a patron.
8. Tell me about your process to modify a due date
 - a. On a patron-by-patron basis
 - b. Modify due date for an entire day

Follow Up

- Is there anything else you think we should know?
- You find a library genie and you get one wish to come true, on Workflows. What is your one wish?

Conclusion

Thank you so much for participating. Those are all the questions that we have. If anything, else occurs to you after this interview, please let me know. We might follow up with you if we have any follow up questions. Do you have any questions? Thank you!



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SWAN Members Focus Group Announced - your input needed!

Added by **Dawne Tortorella** (07/25/2019 - 16:41) , last updated by **Dawne Tortorella** (07/25/2019 - 16:41)

SWAN's five-year strategic plan contains an initiative to develop a shared diagnosis around some member library dissatisfaction around the Symphony integrated library system and the Enterprise catalog. To this end, SWAN formed the Clarity Task Force of 8-member library staff to assist with that diagnosis.

As part of our work to collect member input we will be conducting focus groups to encourage members to share with a small group of colleagues in a structured discussion.

We are seeking to review processes, identify methods of current practice, barriers in use of library system software (Symphony WorkFlows and Enterprise),?workarounds?developed to solve problems or create efficiencies, methods of seeking assistance, and desired outcomes.?

Dawne Tortorella will moderate four focus groups consisting of between?5-7 member?participants. Tara Wood, Manager of User Experience will serve as observer and note taker. A written report of the focus group recurring topics and themes will be used to identify areas where more evaluation and inquiry is needed.? Participant feedback will be anonymous and not associated with an individual or a library in the final report.

To provide as much representation as possible across the membership, only one person from your library will be able to participate in this round of focus groups. There will be additional opportunity for feedback and input when we release the report from our research later this fall.

If you are interested in participating in a focus group, please register through L2. We will reserve space on a first-come basis, but may need to adjust if we find multiple people from the same library have registered. Participants will be confirmed and provided with initial discussion questions prior to the focus group.

Register to Participate:

- [August 21 10:00-11:30 AM – Batavia Public Library](#)
- [August 23 2:00-3:30 PM – Tinley Park Public Library](#)
- [September 10 10:00-11:30 – SWAN Headquarters \(Westmont\)](#)
- [September 13 2:00-3:30 – Oak Park Public Library \(Main\)](#)

Source URL (modified on 07/25/2019 - 16:41): <https://support.swanlibraries.net/node/66772>

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Bcc: [Tara Wood](#); [Scott Brandwein](#); [Steven Schlewitt](#)
Subject: SWAN Holds Management Evaluations
Date: Friday, July 26, 2019 8:50:00 AM
Attachments: [Hold Configuration Options Analysis 2019-07-26.pdf](#)
[SWAN Holds Management Evaluation 2019.pdf](#)

Hi Volunteers,

At some point you have all been instrumental and volunteered to help SWAN analyze and finetune our global holds management configuration issues. I am hoping to enlist you to help us carefully review and implement incremental changes to this configuration..

Global holds management configuration has been an ongoing discussion and we would like to introduce a change in September with continued evaluation. This discussion is driven largely by the newer libraries joining SWAN who are experiencing a higher number of holds that could/should be filled by items on their shelves instead of traveling from another library, compared against previous experience. Other consortia (previously LINC, MAGIC, RSA, and CLEVnet) do not allow dynamic holds (See #12 on Hold Configuration Options Analysis 2019-07-26.pdf) . The Pull List is basically static until it is run again. Typically they run an AM and PM static pull list. Giving this up in SWAN is not something we want to do without trying other options. Libraries that are checking to fill holds throughout the day would greatly miss this level of service.

I hope you are all willing to join us in this deep dive into holds management configuration. Attached are two documents:

- Hold Configuration Options Analysis 2019-07-26.pdf – a detailed explanation and highlight of things for us to consider
- SWAN holds Management Evaluation 2019.pdf – a summarized explanation of the issue and work plan for tuning

Basically everyone in SWAN is working on providing feedback, support, and assistance in this analysis and turning. I'll be calling on the expertise of Crystal, Sam, and Vickie in brainstorming and testing potential configurations and measuring impact.

It will be a slow and methodical process. I hope you are willing to be closely involved! Holds Management is the heart of the SWAN consortium – we do not want to break things, so we are being very diligent and careful in this approach.

I'll send out a GoToMeeting invite to have a discussion and review this complex topic. In the meantime, feel free to send me any questions/comments and I'll try to address them as we move forward. Also note we have a session on SWANx on this topic.

Thanks!
Dawne

Dawne Tortorella

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SWAN Holds Management Evaluation

Date: July 26, 2019

July-October, 2019 – Timeline for initial evaluation and impact of global changes

Statement of Issue

Holds fulfillment management within a large consortium is challenging. The goal is to get the requested title into the hands of the patron as quickly as possible. This requires balancing two potentially conflicting configuration settings: allowing dynamic holds (first available copy triggered) vs filling the hold with an on-shelf item at the pick-up library.

Evaluation Team

Members:

- Christine Sporleder, Bloomingdale Public Library
- Bonni Ellis, St. Charles Public Library District
- Michelle Kurczak & Mary Malach, Messenger Public Library of North Aurora
- Julie Lombardo, Woodridge Public Library
- Cheryl Pawlak, Downers Grove Public Library
- Christine Sporleder, Bloomingdale Public Library

SWAN Staff (primary consultants, others will be included too):

- Dawne Tortorella
- Crystal Vela
- Samantha Dietel
- Vickie Totton

Current Global Configuration

Success in the SWAN holds configuration environment is very dependent on internal procedures. Libraries which include opening and closing procedures to check available holds, as well as periodically throughout the day checking the dynamic *Onshelf Items wizard* within Symphony WorkFlows are able to fill holds with local items at a higher level.

This practice of allowing dynamic database updating differs from some consortia, including past practice of N19 consortia, that did not enable dynamic holds. In SWAN, the Onshelf Items wizard dynamically updates during the day, based on newly available items.

Member Library Practice

SWAN runs the *List onshelf Items with Holds Report* (pullonshelfhld) daily at 7:30 AM. This list creates a pull list containing a list of items that are qualified to satisfy a hold and can be picked up somewhere in the library system. This list updates the items listed in the *Onshelf Items wizard*.

Library staffing patterns and holds processing within SWAN tend to fall within the workflows, or a combination:

1. Set time when Onshelf Items wizard is reviewed, typically once or twice a day

2. Continuously check Onshelf Items throughout the day
3. Staffing determines when/if pulling items to fill holds is possible on any particular day

Proposed Changes

See the *Hold Configuration Options Analysis 2019-07-26.pdf* document.

9.	SWAN	RSA	Other	Test Case
System is configured to NOT trap hold with first item received	x			
System is configured to trap hold with first item received		x	x	X – target 9/1

Test Change #1 – Scheduled for 9/4/19: This configuration change is recommended as a first step in testing configuration options. Through consultation with other consortia and SirsiDynix, this is the most likely setting to positively impact “time to patron’s hands” – getting the item to the patron as quickly as possible. It may also result in items being transited (from Library A to Library B for hold, Library B checks in – and it immediately is transited back to Library A because Library B filled the hold locally while item as in transit). This will impact some procedure practice and require communication, but impact is positive for patron experience.

To begin the process of configuration changes and analysis, the following timeline is proposed:

July 25-August 31:

Run a daily report to calculate mean and median of holds filled that day. This report will be compiled to determine of titles filled on a daily basis, what is the average of median of time to fill. The monthly composite will also be calculated. The following examples show the extreme cases of time to fill from 7/24/19, as well as the average and median days to fill.

On July 24, 2019:

5,896 holds filled

Average days to fill: 9.97

Median days to fill: 6

1	Title	Hold Placed	Hold Filled	Days	Median
2	Guinea pigs / Anita Ganeri	20190724	20190724	0	
3	Teen mom 2. Season 1 [videorecording]	20190724	20190724	0	
4	Woodrose mountain / RaeAnne Thayne	20190724	20190724	0	
5	Sweet Laurel Falls / RaeAnne Thayne	20190724	20190724	0	
6	Best of Bond-- James Bond [sound recording] : 50th anniversary collection	20190724	20190724	0	
7	Dad is fat [sound recording] / Jim Gaffigan	20190724	20190724	0	
8	Willowleaf Lane / RaeAnne Thayne	20190724	20190724	0	
9	Console wars : Sega, Nintendo, and the battle that defined a generation / Blake J. Harris ; for	20190724	20190724	0	
10	Bad love : an Alex Delaware novel / Jonathan Kellerman	20190724	20190724	0	
11	Veronica Mars [videorecording] / Warner Bros. Digital presents ; a Spondoolie production ; s	20190724	20190724	0	

...

1	Title	Hold Placed	Hold Filled	Days	Median
5888	Girl, wash your face : stop believing the lies about who you are so you can become who you	20190207	20190724	167	
5889	Sophia pressed among beasts / James Patterson with Emily Raymond	20190205	20190724	187.2	
5890	Gunsmithing - Rifles	20190205	20190724	169	
5891	Why they can't write : killing the five-paragraph essay and other necessities / John Warner	20190204	20190724	170	
5892	Educated [book club bag] : a memoir / Tara Westover	20190124	20190724	181	
5893	Letting go : the pathway of surrender / David R. Hawkins, M.D., Ph.D	20190117	20190724	188	
5894	Mini habits : smaller habits, bigger results / by Stephen Guise	20181027	20190724	270	
5895	Mission: Impossible : the 5 movie collection	20180921	20190724	306	
5896	Incredibles 2 / Disney presents a Pixar Animation Studios film ; written & directed by Brad Bi	20180814	20190724	344	
5897			5896	9.974780893	6

August 16, 2019:

Present plan and discussion at SWANx. After SWANx, documentation and communication will go out to the membership attempting to simplify this complex puzzle as much as possible. We need to communicate “what does this mean for me” and how it may impact checkout and processing of transited items.

September 3, 2019:

Implement changes to global configuration settings as outlined. This must be scheduled and completed by SirsiDynix.

September 4-30, 2019:

Continue data analysis to determine if any change in average and median days to fill is seen.

October 1-15, 2019:

Assess additional recommendations and test plan for global configuration changes.

SWAN Hold Configuration and Options

NOTE: Red text to indicates the current setting for SWAN's system

Highlights represent consideration to change

Highlight represents next option for implementation/change and scheduled date

Date: July 26, 2019 – this document will be updated and published as new revision copies to maintain historical archive of changes.

SWAN runs the pullonshelfhd report at 7:30 AM daily.

RSA runs the pullonshelfhd report 2x a day (5 AM and Noon). *[Many of our smaller libraries open late and found their morning picklists were often full of items already trapped by discharged items. So we run the report 2x a day and tell libraries to use the most current version when the pull their holds. If they don't get to them until after lunch, they use the noon report. Many libraries fill all the holds on both report runs. **RSA does not have dynamic updating of holds turned on, so holds are not dynamic.**]*

1.	SWAN	RSA	Other	Test Case
Holds are prioritized by user library	x	x		
Holds are prioritized by pickup library				

This setting is only considered if the client has set up prioritization options in the Hold Map. (0) is set as the default.

SWAN prioritizes by user library. *Given our high rate of reciprocal borrowing and traveling between libraries this may be a setting to consider review in the future.*

If Holds are prioritized by user library, the system evaluates priority as follows:

- **NONE** – no priority is assigned
- **OWN_LIB** – holds placed by users registered at the library that owns the item will receive priority
- **OWN_GROUP** – holds placed by users registered at the libraries that belong to the hold libraries group of the item's owning library will receive priority [used for OPS/OES/OZS – Oak Park & branches]
- **OWNLIBGROUP** – holds placed by users registered at the library that owns the item will receive the item first, then users belonging to the hold libraries group, and finally holds for any other libraries in the system

If holds are prioritized by pickup library, the system evaluates priority as follows:

- **NONE** – no priority is assigned
- **OWN_LIB** – holds placed by users requesting pickup at the library that owns the item will receive priority
- **OWN_GROUP** – holds placed by users requesting pickup at the libraries that belong to the hold libraries group of the item's owning library will receive priority
- **OWNLIBGROUP** – holds placed by users requesting pickup at the library that owns the item will receive the item first, then users requesting pickup at the hold libraries group, and finally holds for any other libraries in the system

RSA Comments: *My patron gets my copy of an item when it becomes available even if they aren't #1 on the overall hold list. Makes libraries happy because even if they transit their copy, their patron's are still considered first when it becomes available. All our hold map lines use the OWN_GROUP priority. In RSA we have a group for each member of RSA which is either the single library or the library + branches. For publics all patrons belong to the main branch so OWN_GROUP is the setting that gives patrons priority over all branch items.*

2.	SWAN	RSA	Other	Test Case
A trapped item will fill the holditem hold first regardless of priority				
A trapped item will fill the highest priority hold first	x	x		

This setting is considered if the library uses the pullonshelfhd report, which writes to the holditem database. If pullonshelfhd has run and matches an item to user A, but *after* pullonshelfhd runs user B places a hold on the title and user B has a higher priority, this config determines who gets the item when it is trapped – user A (A trapped item will fill the holditem hold first regardless of priority) or user B (A trapped item will fill the highest priority hold first).

The system default is (A trapped item will fill the holditem hold first regardless of priority) and ideally keeps items from crossing paths in transit. However, sites concerned with priority may choose to update to (A trapped item will fill the highest priority hold first).

An example case illustrates a situation in which the flag had to be changed to (A trapped item will fill the highest priority hold first): In short, holds were established for on-order items, but when the items were created, they didn't match up with the holding code (say, the holding code was BOOK whereas the item was created as NEW-BOOK). When the Link Order Holds report was run, the hold was not moved to the added item because of this discrepancy and the hold was not filled. Changing this setting to (A trapped item will fill the highest priority hold first) ensured the users with holds on these on-order items were not skipped.

RSA Comments: *Get the patron the item as quickly as possible. A few extra transits are ok with us.*

3.	SWAN	RSA	Other	Test Case
Holds may not be placed on copies on order		x		
Holds may be placed on copies on order	x			

If (Holds may be placed on copies on order) is selected, the staff/public may place holds on a title without an item as long as the title is tied to an open purchase order. The holding code is used in order line distribution to determine holdability.

RSA Comments: *I honestly don't remember exactly why we do this. I know we have all kinds of issues with on-order records. Might be something we need to look into.*

4. Holdability by group:	SWAN	RSA	Other	Test Case
Only the station library will be checked when a hold is created	x	x		
The station library's group and/or system will be checked when a hold is created depending on the range				

This attribute is only relevant for sites that do not allow holds on available items. Those sites will want to select option (The station library's group and/or system will be checked when a hold is created depending on the range) to block holds on available items.

RSA Comments: *We only have like 9 libraries that don't allow location holds. None of our publics with branches disallow local holds so it's really not something that affects us.*

5.	SWAN	RSA	Other	Test Case
Do not check for available items at the hold pickup library when deciding whether to allow a hold on available items	x	x		
Always check for available items at the hold pickup library when deciding whether to allow a hold on available items				
Only check for available items at the hold pickup library when deciding whether to allow a hold on available items for holds placed from the OPAC				

This attribute was designed for sites that want to restrict placing holds on available material. If a site has the Hold Available Libraries field in the Library Policy set to some (or none), then this should be set to (Always check for available items at the hold pickup library when deciding whether to allow a hold on available items) or (Only check for available items at the hold pickup library when deciding whether to allow a hold on available items for holds placed from the OPAC) to check for available items to block holds from libraries not in the Hold Available Libraries list. The idea is that if the item is available at the hold pickup library, the system will check the pickup library and the hold will not be placed since the patron can find the item on the shelf.

It does not apply if the Hold Available Libraries are set to ALL as SWAN is set.

6.	SWAN	RSA	Other	Test Case
Ordered hold fill is NOT enabled			x	
Use unordered hold fill	x			
Use ordered hold fill		x		

This setting may be something to consider changing but will require some review and possible reconfiguration of holds group. This may tie into creation of groups based on delivery hubs as a test.

This setting is used by the pullonshelfld report to match a hold with an item. The system default is (Ordered hold fill is NOT enabled), wherein the system prioritizes selected copies by first attempting to get an item located in the pickup library. If no such copy exists, it will attempt to get a copy from the holds group of the pickup library. If no copy exists, it will then look within the system.

If (Use unordered hold fill) is selected, system randomly pulls eligible items associated with a title to fill a hold. For the Order Hold Fill wizard to appear, (Use ordered hold fill) must be selected. This option will also allow the site to honor the order of libraries within library groups, and a checkbox will become available in the Library Group policy.

RSA Comments: *Used to pull copies from branches to fill local holds first. Reduced transit a lot since our largest library, Peoria, has 7 branches.*

7.	SWAN	RSA	Other	Test Case
Do NOT check for holdable copies owned by pickup library or pickup library's hold group for system range holds placed via OPAC	x	x		
Check for holdable copies owned by pickup library or pickup library's hold group for system range holds place via OPAC				

This setting will trump the lbistro system.env setting of HOLD_RANGE (i.e. HOLD_RANGE|SYSTEM or HOLD_RANGE|GROUP). That is, if the system.env HOLD_RANGE variable is set to SYSTEM, you can use (Check for holdable copies owned by pickup library or pickup library's hold group for system range holds place via OPAC) to check the pickup library's group and make it a group level hold instead of allowing a system level hold. The system default is (Do NOT check for holdable copies owned by pickup library or pickup library's hold group for system range holds placed via OPAC).

This also works with Enterprise; however, if sites customize their pickup libraries by profile, and a patron uses an Enterprise profile that is not for their home library, they could potentially receive an error message that "no items qualified for holds" because they do not have access to the profile's hold group. See notes below:

"The problem is that with the Enterprise OPAC, your search profiles' pickup library options are limited to the library policies of a specific group in the consortium. So when a patron using an Enterprise profile not their own attempts to place a hold, if there is an item owned by the library group tied to the selected pickup library, then the "no items qualified

for hold” message appears, because the patron doesn’t have group hold range permissions for this library group’s items. I would recommend you turn this setting off, or set all the Enterprise profiles to display ALL pickup libraries. OR force the patron to go to his specific Enterprise profile using a splash-page, default on the library workstations, IP redirect, etc.”

RSA Comments: All holdability by other libraries is set by the combo of library policy (in our case either PUBLICS, SCHOOLS, or ALL LIBS) and Hold map to limit specific item types. The base assumption is that all items are holdable by all patrons and we work backwards from there to enable limits at individual libraries.

8.	SWAN	RSA	Other	Test Case
Group range holds on station operator’s hold group	x	x		
Group range holds on pickup library’s hold group				

Given our high rate of reciprocal borrowing and traveling between libraries this may be a setting to consider review in the future. This may also be helpful in those situations where we want to restrict placing holds on items as the example below shows – only allowing pickup from the item library. RSA comments show why this may not be wise to change.

This setting is relevant for sites who use permission settings in the Hold Map. When placing a group-range hold specifically, if (Group range holds on station operator’s hold group) is chosen, the stations user’s library (be it the OPAC or WF) will be compared against the item library’s hold group to evaluate permission, whereas if (Group range holds on pickup library’s hold group) is chosen, the pickup library will be compared against the item library’s hold group. The system default is (Group range holds on station operator’s hold group).

An example as to why you may want to use (Group range holds on pickup library’s hold group): One library had a collection of Playaways that they did not want to transit between libraries. By restricting permission by the pickup library’s hold group, patrons could only place items on playaways located where they’d be picking them up.

RSA Comments: We think this stops patrons from gaming their home library’s NO HOLDS rules for item types (NEW-BOOK) by applying those rules to their patrons across the system. All our hold map lines for individual NO HOLDS or LOCAL HOLDS rules are set to OPAC range for pseudo-reciprocity. If we go with the other setting, patrons would learn quickly what library to set as the hold pickup for NEW-BOOK, NEW-DVD, etc.). Our libraries all do their own thing for hold rules, so local policy is the closest we can get to reciprocity.

9.	SWAN	RSA	Other	Test Case
System is configured to NOT trap hold with first item received	x			
System is configured to trap hold with first item received		x	x	x – target 9/1

Test Change #1 – Scheduled for 9/4/19: This configuration change is recommended as a first step in testing configuration options. Through consultation with other consortia and SirsiDynix, this is the most likely setting to positively impact “time to patron’s hands” – getting the item to the patron as quickly as possible. It may also result in items being transited (from Library A to Library B for hold, Library B checks in – and it immediately is transited back to Library A because Library B filled the hold locally while item as in transit). This will impact some procedure practice and require communication, but impact is positive for patron experience.

Option (System is configured to trap hold with first item received) is used to get the item into the hands of the patron as soon as possible, whereas option (System is configured to NOT trap hold with first item received) would be used to keep items from crossing paths. The system default is (System is configured to NOT trap hold with first item received).

As an example, let’s say an item is in transit to Library X to fill a hold (where the pickup library is library X). In the meantime, an item is discharged at library X. If (System is configured to trap hold with first item received) is selected, this item fills the available hold, and the item originally in transit to Library X is sent home. This still honors hold range. If you discharge an item at the pickup location and the item is out of the hold range, it will not be trapped.

RSA Comments: *Get the patron the item as quickly as possible. If an item is discharged and an item is in transit, it will fill the hold for the transit. It does result in a minor number of extra transits, but not too many in our case.*

10.	SWAN	RSA	Other	Test Case
System is configured to fill active unavailable hold when charging a holdable copy	x			
System is configured to fill active available or unavailable title hold when holdable copy is charged		x		
System is configured to fill active available or unavailable title hold when holdable or non-holdable copy is charged				

We may want to consider making this change facilitating a smoother process at checkout if the patron comes to the desk with an onshelf item or staff locate another copy. Need to review current workflow when this occurs and how the change will impact that.

This setting refers to filling holds during checkout. The system default is (System is configured to fill active unavailable hold when charging a holdable copy); if a user places a hold on a title and it becomes available on the hold shelf, but then checks out a different copy of the title, the available hold will remain on the user record.

Option (System is configured to fill active available or unavailable title hold when holdable copy is charged) is useful for filling available title holds during the checkout. It allows you to fill an available hold with a different copy of a title, as long as it is holdable in the hold range. Option (System is configured to fill active available or unavailable title hold when holdable or non-holdable copy is charged) allows you to fill an unavailable or available title hold with a holdable OR non-holdable copy (e.g., signed copy of title). It does not look at range.

RSA Comments: *Not sure that this has ever caused an issue for us or not. We figure if the patron has a copy in their hand and checks it out, it should fill the hold for that title.*

11.	SWAN	RSA	Other	Test Case
Hold map will NOT include OPAC hold range				
Hold map will include OPAC hold range	x	x		

This option adds the OPAC hold range perimeter to the Hold Map, which can be used to determine the hold range (system, group, library, or no_holds) when holds are placed from the OPAC (e-Library or Enterprise). This can be used in tandem with

Group range holds on station operator's hold group
--

Group range holds on pickup library's hold group
--

to determine how group range holds are placed, or with

Holds are prioritized by user library

Holds are prioritized by pickup library

to determine if the hold range is based off the station library or user library. See the WorkFlows help topic, Hold Map Wizard, for more information.

RSA Comments: *Enables pseudo-reciprocity for us.*

12.	SWAN	RSA	Other	Test Case
Dynamic updating of the holditems db is turned OFF		x		
Dynamic updating of the holditems db is turned ON	x			

If dynamic updating is enabled, the Onshelf Items wizard will dynamically update during the day, based on newly available items. If it is not enabled, the Onshelf Items wizard can still be present but the wizard and the database would only be updated when the List Onshelf Items with Holds report is run.

It must be enabled if the client is using the holds pull list in MobileCirc.

RSA Comments: *We tried this with it turned ON and didn't like it. I don't remember why we didn't like it though. It was years ago. Might have been to ensure the first library looking at their onshelf items wizard didn't fill holds forever?*

13.	SWAN	RSA	Other	Test Case
Pickholddm randomizes the selection of qualifying onshelf items to fill holds.	x	x		
Pickholddm prioritizes the selection of qualifying onshelf items to fill holds by more recent Date Last Discharged, Date Last Activity and Date Created values.				
Pickholddm prioritizes the selection of qualifying onshelf items to fill holds by less recent Date Last Discharged, Date Last Activity and Date Created values.				

This settings controls which items are selected by pullonshelfhd and for dynamic pull lists in Symphony. The default (Pickholddm randomizes the selection of qualifying onshelf items to fill holds.), pulls items using normal randomization methods. The other two options look for newer or more recently used (Pickholddm prioritizes the selection of qualifying onshelf items to fill holds by more recent Date Last Discharged, Date Last Activity and Date Created values.) copies. Or older, dusty copies (Pickholddm prioritizes the selection of qualifying onshelf items to fill holds by less recent Date Last Discharged, Date Last Activity and Date Created values.).

RSA Comments: *We would prefer to use the 'less recent' option, but it parks holds on the oldest copies and never moves them to another library. We tried it and it did move ALL the old copies of things, but we ended up with lots of holds stuck in libraries who weren't checking/pulling their pick lists so we when back to 'random'.*

77,437 834,008 10.77 6

Date	DOW	Count	Total Days	Avg Days	Median
7/24/2019	Wed	5895	58,801	9.97	6
7/25/2019	Thur	5723	57,311	10.01	6
7/26/2019	Fri	4490	44,248	9.85	6
7/27/2019	Sat	3320	37,589	11.32	7
7/28/2019	Sun	1194	15,862	13.28	7
7/29/2019	Mon	5156	60,640	11.76	7
7/30/2019	Tues	6033	64,472	10.69	6
7/31/2019	Wed	6032	61,287	10.16	6
8/1/2019	Thur	6299	61,616	9.78	6
8/2/2019	Fri	5073	52,462	10.34	5
8/3/2019	Sat	4041	47,319	11.71	6
8/4/2019	Sun	1250	15,909	12.73	7
8/5/2019	Mon	5193	62,525	12.04	7
8/6/2019	Tues	5723	67,210	11.74	6
8/7/2019	Wed	5868	62,658	10.68	6
8/8/2019	Thur	6147	64,100	10.43	6

