

CARL Conversations: June 10, 2021

Topic: Weeding Report Options

Question and Answer Session

1. Why should we set the “Beginning Date” so far back when running the Items by Status report?

Choosing an older beginning date will help in catching older items. If libraries choose a more recent date but are looking for items that haven't circ'd in X years, then they may miss some items in their results. This isn't required for running the report, just suggested. Libraries know what they are looking for in terms of lists, so this is just a reminder that if choosing a more recent date, you may not catch everything.

2. In either report, Items by Status and Collection List, should staff be sorting the results on the Last Circ Date?

They can, yes. Sorting these reports on the Last Circ Date will help staff identify which items have recently been circ'd opposed to those that have not. If this is the criteria libraries are looking for when running these reports, then we highly recommend sorting on the Last Circ Date to remove those items you may not need.

3. Why is OWLS suggesting libraries use the Collection List report instead of the Items by Status report?

It has come to OWLS' attention that the Items by Status report can result in other library's materials showing up. This would happen if libraries chose today's date as the End Date while selecting All Statuses. The Items by Status report will show libraries what is currently in their library, which includes other library materials on the hold shelf. Please be aware of this if using the current date as the End Date and selecting All Statuses.

4. What is the Last Circ Date actually representing in both reports?

The Last Circ Date in any report is a representation of the last time an item status was changed. While this does mean anytime an item is checked out (ex. status is changed from On Shelf to Checked Out) it also means any time an item status changes, that date is updated. An example would be an item that hasn't been checked out in 2 years but recently was changed to Repair, would fall off a circ report if staff were only pulling for those items that haven't circ'd in 2 years. The Last Circ Date would get updated to when staff changed it to Repair. This also means that if staff need OWLS to globally update a collection to TEMP CLOSE, every single item that gets updated will then have a Last Circ Date of when the TEMP CLOSE was put on.

5. What should staff do when they need to globally change a collection to TEMP CLOSE, or Library Use only?

If staff know they will be needing to change a collection(s) to TEMP CLOSE, they should run any and all weeding reports prior to that. OWLS will try and remind staff of this before globally

updating anything. A good rule of thumb would be to run a Collection List for all items in the library, no limitations, prior to any global changes so that staff have that as a reference.

6. How do I get my library listed as a parameter set in any given report?

When a library is logged in to CARLX, they just need to make sure when they are in the report window to choose the DEFAULT Parameter Set and then in the View/Edit Parameters choose your branch from the options. After Save is chosen and the report is ran, the library you are logged in as should now appear as an option.

7. Could we have a Reports group or email list so that libraries can bounce workflows and ideas off each other when it comes to reports?

Yes. OWLS will create an email list for report discussion and suggestions.

8. Is there a report we can use for finding fines paid?

Yes. Libraries can use the Audit Trail Report 55. Staff can enter in the time frame they would like to use for when the fines were paid. They can also choose a specific terminal and the payment type; Paid, Waived, Cancelled, or Refund. The Excel output will have 3 sheets so be sure to check each of those for what you need. The second sheet will be the one that gives you each individual payment. If you don't see this report when using your regular login, try using your "xxxtech" login. If you aren't sure if you have a "tech" login, please contact OWLSnetHelp and we will get you that information.

9. When items have a withdrawn status, are they ever deleted after a certain amount of time, or are they in the system indefinitely?

Currently, OWLS is not bulk deleting items with a Withdrawn status. There is no immediate need to remove these items. However, OWLS does have a way to bulk delete and can look at an annual process in which these items are deleted after annual reporting. OWLS will check with TLC to make sure that the stats pulled for annual reporting aren't specifically tied to those stats in item records. OWLS will also ask libraries more about this at AAC. In the meantime, if libraries want to delete items, they can. It's your item so it is your choice. And Withdrawn items are suppressed from the catalog, too, so patrons don't see them.

10. What is the purpose for keeping withdrawn items in the system?

OWLS has been keeping the withdrawn items in the system because that way staff still have access to them if needed. OWLS hasn't been bulk deleting because if there are any outstanding fines attached to any of those items, then there is a pop-up message indicating as such. And that happens for each item that has a fine attached to it. So, it becomes a tedious and frustrating process when there are a ton of items to delete at once.

11. If we've withdrawn magazines, is it okay to completely delete them from the listing?

Yes. If staff are comfortable deleting their item from a BID, it is perfectly fine to do so.

12. Is TLC still working on having a less dynamic router in place so that libraries can have a chance to fill holds for their patrons before other library's available items fill them?

Yes, as far as we know they are working on this. There is no current ETA but OWLS understands the frustration and pokes TLC about it here and there.