LIBRARY OPERATIONS COMMITTEE AGENDA
Wednesday, September 4, 2024– 10:00 a.m.
Black Gold Admin. Office
580 Camino Mercado, Arroyo Grande

1) **10:00 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding Recorder; Meg Weber, Paso Robles Library.

2) **ADOPT AGENDA** —

3) ***APPROVE MINUTES** — July 10, 2024, by Shannon St. Arnaud (SM)

4) **CIRCULATION**

   a) **Reports**

      i) ***Review Best Practices for Circ Manual** – Review best policy for cleaning up custom reports and duplicating report templates and reports created by other jurisdictions.

      ii) **Report Workshop** – Theo Faris (Lompoc Library). Demonstration of basic report building with examples of common reports for library use. Participants are encouraged to bring a laptop to practice building their own report.

5) **TECHNICAL**

   a) **Koha/Aspen Issues** – Discussion – A chance to talk about issues happening in Koha or Aspen. Discuss possible changes of global settings to optimize Koha functionality.

      i) **Item Types** – Discussion – Discuss current item types available, the effect adding item types have to library operations and reporting for the Cooperative. Discuss reasonable parameters for adding item types and possible solutions for specialty items in the catalog.

      ii) **Changing Patron Search default in Koha**. – Discussion – DK(LM). Can the Patron search be modified? Is it possible to change the default Patron Search under the Search Type. Currently the default search type is Starts With, and we would like the default to be Contains (Starts With and Contains are the only options). It is much more useful with contains because it will search for what is entered vs. starts with only searches the beginning.

6) **BLACK GOLD UPDATE**

   a) Koha Upgrade - Scheduled for October.

   b) Operations Website Update

7) **ROUNDTABLE**

8) **ITEMS TO BE FORWARDED**

9) **AGENDA BUILDING**

10) **NEXT MEETING** — 10:00 a.m., Wednesday, October 2, 2024 (Online)

11) **ADJOURNMENT**

Distribution — email notice of web-posted agenda packet (available at www.ats.blackgold.org): Meg Weber, PR; Joanne Britton-Holland SM; Shannon St. Arnaud, SM; Dominic Keen, LM; Lyric Nicolini, GO; Eric Castro, CC; Brenda Goldy, SP; Matt Duhon, BG; Glynis Fitzgerald, BG; Directors [File Copy];

LIBRARY OPERATIONS COMMITTEE MINUTES
07.10.24
Online – Microsoft Teams

Attending: Glynis Fitzgerald (BG); Kristina Uvalle (BG); Matt Duhon (BG); Meg Weber (PR); Shannon St. Arnaud (SM); Dominic Keen (LM); Elizabeth Saucedo (GO); Lyric Nicolini (GO); Brenda Goldy (SP); Eric Castro (CC)

1) **10:02 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding
   Recorder; Shannon St. Arnaud (SM)

2) **ADOPT AGENDA** —1st Elizabeth Saucedo (GO)/ 2nd Meg Weber (PR). Approved

3) ***APPROVE MINUTES** — 05.01.24 by Dominic Keen (LM). 1st Elizabeth Saucedo (GO)/ 2nd Meg Weber (PR). Approved as updated.

4) **CIRCULATION**

   a) **Reports** (BG) **–** Discuss clean-up of existing reports and potential best practices for creating and maintaining reports within Koha.

      Discussion and demonstration of saving and copying reports. Discussion of best practices for deleting reports no longer being used. Discussion of reports commonly used and "wish list" for new reports.

5) **TECHNICAL**

   a) **Koha/Aspen Issues** – Discussion of Koha and Aspen issues. Next Koha update will be August 20, 2024.

6) **BLACK GOLD UPDATE -** New courier service is being used for deliveries. Servers have been moved to new data center. Patron account clean up took place at the end of June 2024.

7) **ROUNDTABLE –** N/A

8) **ITEMS TO BE FORWARDED –** (To Administrative Council) – N/A

9) **AGENDA BUILDING** – Streamline and refine reports, share "favorite" reports, list of reports to work on.

10) **NEXT MEETING** — 10:00 A.M., Wednesday, August 7, 2024 (Webinar)

11) **ADJOURNMENT** at 11:27 A.M. 1st Meg Weber (PR)/2nd Brenda Goldy (SP).

* Denotes attachment to agenda packet

LIBRARY OPERATIONS COMMITTEE MINUTES
07.10.2024
Online

Attending: Glynis Fitzgerald (Black Gold); Kristina Uvalle (Black Gold); Matt Duhon (Black Gold); Megan Weber (Paso Robles); Elizabeth Saucedo (Goleta); Lyric Nicolini (Goleta); Eric Castro (Carpinteria); Brenda Goldy (Santa Paula); Dominic Keen (Lompoc); Shannon St. Arnaud (Santa Maria)

1) **10:05 A.M. CALL TO ORDER** Glynis Fitzgerald, Chair, Presiding
   Recorder; Dominic Keen (Lompoc)

2) **ADOPT AGENDA** —1st Elizabeth Saucedo (Goleta)/ 2nd Megan Weber (Paso Robles). Approved

3) ***APPROVE MINUTES** — (May 1st, 2024). 1st Elizabeth Saucedo (Goleta)/ Megan Weber (Paso Robles). Approved

4) **CIRCULATION**

   a) **Reports** (BG) – Discuss clean-up of existing reports and potential best practices for creating and maintaining reports within Koha.
      i) Best Practices – Includes copying and saving. Creating a Duplicate - In the Report Group create a duplicate and name it Test, now it is a separate report. Now it can be renamed and added to jurisdiction reports. Use the notes field for who is using the report and what it is for. Also, since Duplicates lose the original author of the report, add who the original author is.
      ii) Deleting Reports – There are currently more than 600 reports out there and you need to clean up your jurisdiction's reports. Look at the last run date. See if there was an upgraded and edit of the report and get rid of the previous versions.
      iii) Favorite Reports – Reports 755 & 756 on inventory and weeding. #25 on Circulation over the last 24 hours. If you have any Reports that you consider very useful share them with the LOC.
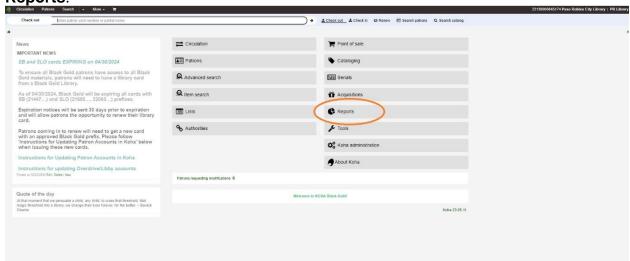
5) **TECHNICAL**

   a) **Koha/Aspen Issues** – Notices Again - Looking at your jurisdiction notices and change language if you choose. If no notice is used it will use the Black Gold Notice. @42,000 patrons were deleted that were PacReg, SLO, & SB patrons.

6) **BLACK GOLD UPDATE** – Update on Holds Cancellation Options, currently 2 options: In development to add more options.

7) **ROUNDTABLE – (**SM) Fix it Kits, new staffing, clothing exchange, programs adult & youth by age group. (PR) Lunch at the Library was good, new Privacy Pod, LSTA Grant for Study Center, community space, interviewing for 2 new staff. (SP) SRP and Lunch at the Library were great. (LM) Lunch at the Library and SRP were great, successful programming, new Privacy Pod, fully staffed.

8) **ITEMS TO BE FORWARDED –** (To Administrative Council) None.

9) **AGENDA BUILDING** – Reports.

10) **NEXT MEETING** — 10:00 a.m., Wednesday, August 7, 2024,

    10 a.m., Wednesday, September 4th, 2024

11) **ADJOURNMENT** at (1:00 p.m.) 1st Megan Weber (PR) / 2nd Brenda Goldy (SP)
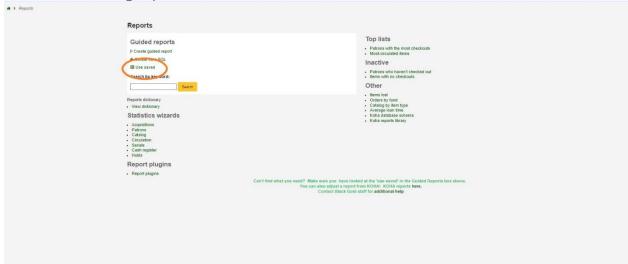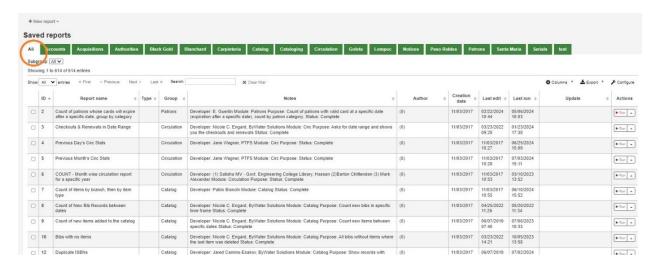
KOHA REPORTS

BEST PRACTICES

To access reports in Koha, start by navigating to the Home page and selecting **Reports**.
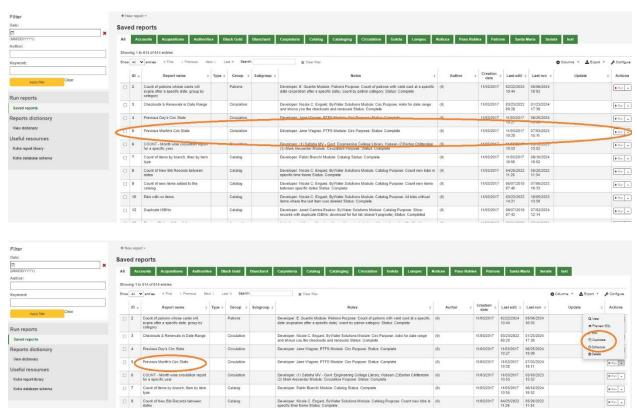

To use an existing report, click on **Use saved**.

This will take you to the Saved Reports page, where all available reports can be found under the **All** tab.

If you find a report that you like and plan to use frequently, it's best to duplicate it and assign the duplicated report to your library's Report Group.
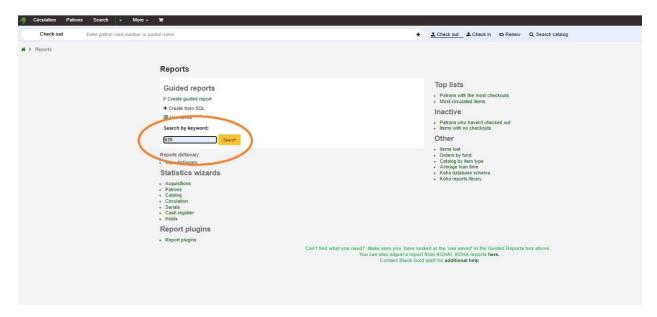

Duplicating the report creates a new report with a unique identification number.

You can then edit the report's name, description, and SQL code if needed. Any changes made to this duplicate report will not affect the original version.

Both the original and the new report will appear under the **All** tab, and the new report will also appear under your library's tab if you set your library as the Report Group.

Important: If you modify a report without duplicating it first, you will be altering the original report. This can lead to unintended consequences for other libraries that may rely on that report, as any changes will affect their version as well.

If you already know the report number or name, you can quickly access it by entering this information in the **Search by keyword** field on the **Reports** page.

You are also welcome to create your own reports in Koha. **Be sure to save any new reports under your Library tab.**

If you need a specific report but are unable to create it yourself, please contact the Black Gold office, and they will assist you in creating the report.