Date
16 May 2023 (11:00 AM Eastern)
Meeting Zoom: zoom.us/j/244921097 (passcode: see FOLIO Meetings with Zoom)

Recording
TK

Attendees
TK

Recommended Resources and Pre-Reads
- How to write your circ rules: https://github.com/folio-org/mod-circulation/blob/master/doc/circulationrules.md
- What happens if you change your circ rules: Circulation Changes After an Item Is Loaned
- Other people’s circ rules:
  - Example Circulation Rules from Adopters
  - https://confluence.cornell.edu/display/folio/General+-+Circulation+rules
- How to test your circ rules:

Agenda
- Housekeeping
  - Upcoming Sessions
    - WOLFcon is COMING!
      - Submissions (fully baked or in draft form) from individuals, SIGs, or other groups are welcome.
      - Submissions will be accepted through Monday, June 5, 2023. You can submit them here: WOLFcon 2023 Proposal Form
    - Session Types:
      - Community Sharing geared towards updating the community or stakeholders regarding on-going work of a project, lessons learned, or best practices
      - Presentations or panel discussions geared towards a better understanding of the open source space within libraries or general project
      - Working meetings are business meetings that are oriented towards a special interest group (SIG), working group or other organization of volunteers working together on community projects.
      - Workshops are oriented towards solving a problem, gathering wide input, or interactive session on learning about a specific workflow or tool
    - Everyone is encouraged to submit sessions. Does Implementers want to propose a session?
  - Circulation Rules
    - Have you changed your circulation rules since you went live? How did you approach this project?
    - What exactly is the deal with long circulation rules? Why is this a problem?
  - Closing
    - Any actions or follow through?

Notes

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Notes</th>
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<tbody>
<tr>
<td>06:40</td>
<td>Houskeeping</td>
<td>Next sessions: ABLE Bindery on 23 May. Fiscal year rollover on 30 May. WOLFcon submissions - would we like an Implementers’ session? Tara to think about what we want to do, will put it on Slack.</td>
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<tr>
<td>09:25</td>
<td>Circ rules</td>
<td>Cornell has all their circ rules on their wiki (available to everyone). Most rules use indentation to split them up, so changing and adding things is fairly quick (e.g. adding new notice policy). Length is a little deceptive, because they have comments to explain the rules.</td>
</tr>
<tr>
<td>11:06</td>
<td>Cornell circ rules</td>
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<td>15:35</td>
<td>5 Colleges circ rules</td>
<td>5 Colleges has simplified their rules as much as possible. Advice: Naming convention, make the policies clear and consistent! Originally thought that priority was: loan type first + same policies per patron group. But local borrowers meant that didn’t work out fully, because they can only borrow from their local institution, so we had to add location as a parameter.</td>
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<td>18:06</td>
<td>&quot;All&quot; + length</td>
<td>&quot;All&quot; key-word to force the count of parameters to be high enough for the priority calculation. Policy names don't have length limit + the circ rule editor adds the hyphens in the policy names, where there are spaces. You can list multiple parameters.</td>
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<td>23:00</td>
<td>What's the advantage of making the circ rules shorter?</td>
<td>The circ rules and priorities are calculated line by line; the fewer you have, the less likely you are to have problems? Also: easier to read and distribute. We did not let the gift of a new system pass us by: We looked into which rules we could combine. Also: yes, circ rules are complicated, but people can learn to understand and deal with them. Having the comments in are not a problem!</td>
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<td>30:36</td>
<td>Closing library for a year: how to best change a circ rule temporarily?</td>
<td>Wiki page has info about what changes after an item is loan. You could extend the existing loan policy; you could change the policy in the circ rule. When an item is renewed, FOLIO looks at the circ rule to check which policy to follow. The loan, request and notice policies are checked; the overdue and lost item policies are NOT updated, as the decision was to not allow the monetary conditions to change after the loan (e.g. you though this would cost you x$, in fact now it costs y$). Or you could do a skripted bulk renewal or loan due date update. Also: Will items be moved to a different location? And will requests still be allowed?</td>
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<td>39:20</td>
<td>Ask RA SIG</td>
<td>Feel free to ask someone from the RA SIG to look at your circ rules if you're trying to figure something out. Also: There's never one way of doing things. Any the circ rules can be very powerful.</td>
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**Action Items**