

**PRAIRIECAT CIRCULATION COMMITTEE**  
**AGENDA**  
**October 24, 2023**  
**1:00 PM via Zoom**

The PC Circulation Committee will meet Tuesday, October 24, 2023, at 1:00 pm via Zoom. To join the meeting, please visit:

<https://prairiecat-org.zoom.us/j/83834294134?pwd=eW83MU92QkVVTIJCRHJyNHBLUmwQT09>

These are open meetings and everyone is welcome to attend and to contribute, but only the committee members may vote. Six Committee Members are required to have a quorum.

*Committee charge: The 11-member elected standing group discusses circulation and OPAC topics. It is empowered to make decisions on procedure and some policy decisions, and to make recommendations to Administrative Council for higher-level policy decisions. It also reviews circulation procedures and works together to resolve circulation issues.*

- 1) Welcome
- 2) Roll call of committee members for attendance
- 3) Review agenda for additions/corrections
- 4) Approval of minutes from August 22, 2023
- 5) New topics
  - a) Sierra 6.0 Upgrade
  - b) Fine free libraries update
  - c) [Fine-Free Guide](#)
  - d) [RAILS list](#)
  - e) New item type: 85 Library of Things items
  - f) New and Upgrading Libraries
  - g) PUG Day, call for Engagement Committee volunteers
  - h) Upcoming Innovative [webinars](#), Illinois book ban legislation and library marketing
- 6) Friendly Reminders
  - a) Demo of transfer holds procedure
- 7) BYPT "Bring Your Problems Time"

Next Circulation Committee meeting: February 27, 2024, 1:00 pm, via Zoom

**PRAIRIECAT CIRCULATION COMMITTEE**  
**DRAFT MINUTES**  
**August 22, 2023**  
**1:00 pm via Zoom**

**MEMBERS PRESENT:** Bonny (PC), Elsner (HC), Ericksen (FR), Hansen (CH), Landis (PC), Linnell (BD), Sangston (MA), Shelton (WL), Slanicky (PC), Smith (PC), Tedder (PC), Wiegert (FP), Wood (JO), Zamorano (WO), Zanelli (PC).

**MEMBERS ABSENT:** Kofoid (GV), Snidanko (HD).

**GUESTS PRESENT:** Calbow (UE), Carter (SL), Christenson (KR), Christiansen (MX), Close (SR), Elsner (HC), Fane (LP), Fine (PR), Gunn (EJ), Hancock (LP), Hoste (CL), Ippolito (RP), Kozinski (DK), Martin (MP), Mason (RL), Owens (MN), Peschang (RD), Smaga (PE), Struthers (PD), Studer (HD), Thomas (RK), Watson (HC), Waugamon (PT), Yoeckel (SN), Zielezinski (SA).

**I. Welcome** – Landis (PC) began the meeting and welcomed everyone.

**II. Roll Call of Committee Members for Attendance**

**III. Review Agenda for Additions/Corrections** – Old billed items were removed from section V and a new topic was added.

**IV. Approval of Minutes from June 27, 2023** – Sangston (MA) made a motion and Wood (JO) seconded to approve the June 27, 2023 minutes as written. Minutes approved.

**V. New Topics**

**a. Welcome Back to our School Libraries** – Landis (PC) welcomed back our school librarians. PrairieCat has 30 school libraries representing 55 branches. Most of the schools are open now. A few schools open at the end of August and about 20 open the day after Labor Day. When placing a hold for an item and if the only owning library is a school that is not open yet, the system will ask for an override. Never use an override to place a hold.

**b. Upcoming Cleanup Projects**

**i. Old Manual Charges** – The support site now has a list of old manual charges in a report called **Old Manual Charges Prior to 1/1/2016** and is available in the August 2023 report section. Landis (PC) will send an email the afternoon of August 22, 2023 about the old manual charges. Any charge over 7 years old cannot be legally collected. In

many instances, these are fines and bills that were migrated from Sirsi to Sierra in 2012 and there is no information to identify which title is being charged. There are over 15,000 of these charges. PrairieCat can do a fine purge for the member library. The items must all have certain fields in common for the automatic purge to work. Open a Help Desk to request a fine purge.

**ii. Unique ID Cleanup** – The unique ID was discussed over a year ago. It was decided to retain it as a required field in the patron record. If a member library needs to receive a report of unique IDs to fix, open a Help Desk ticket and Landis (PC) will send a report.

**iii. Holds Cleanup** – There are over 400 holds that were created prior to January 1, 2023. A significant number of these holds are frozen. Holds from 2021 have cycled out of the paging list and have expired. Patrons have received hold cancellation notices for the ones that were cancelled.

**iv. New and Upgrading Libraries**

1. **Putnam County Primary School** – The Putnam County Primary School is adding their collection to PrairieCat. No target date has been set for Go Live.

2. **Byron Schools** – the Byron schools have one school left out of four to be added. Their data was loaded in 2019 and they are slowly updating their items.

3. **Winnebago Public Library** - The Winnebago Public Library is beginning the process of joining PrairieCat. No timeline has been set yet.

**v. PUG Day** – This year’s PUG Day information is on the website. Registration is open. You can sign up for lunch when you register, or you can opt out. Smith (PC) and the Engagement Team have really put together a great program this year. So far, there are about 200 people registered and there is room for more. Next year’s PUG Day will be virtual, and the following year will be in person. Registration closes on September 13, 2013.

## **VI. Friendly Reminders**

- a. Clear Holdshelf Procedure** – Every PrairieCat library should be using the Clear Holdshelf procedure to clear your hold shelf. [Documentation](#) is available on the support site.
- b. Manage Holds Procedure** – Every library should be using the Manage Holds procedure. There is a video available in Talent LMS that shows step-by-step directions and [documentation](#) is available on the support site. You can generate a list of only frozen holds. If the hold has been frozen for a long time, contact the patron to find out if the items are still needed and have the patron unfreeze them so that the hold can be filled. Landis (PC) can do a Zoom session to review the procedure with anyone who needs help.
- c. Working With Failed Notifications in Your Library Email Account** – Every library should be checking their failed email notifications. [Documentation](#) is available on the support site. This gives examples of all the different email messages where the system tried to send a notice to the patron and the email did not go through. It is very important that these are fixed quickly! These typically indicate an error in the patron’s email address and affect the delivery of courtesy notices, hold notifications, and first overdue notices.
- d. Proper Handling/Placement of Pink Condition Slips** – PC staff have received some complaints that when an item is sent back to the owning library, the pink condition slip is on the inside which is not easily visible to staff. It is in our procedures that the slip needs to be on the outside of the item when it is returned to the owning library. The condition slip needs to go on the item before patrons check it out. If your patron checks out the item and it is returned damaged, use an [assess for damage](#) slip instead of a pink condition slip.

## **VII. BYPT “Bring Your Problems Time”**

- a. Patron Notice Preference** – A patron’s notice preference field was changed to “phone”, but the patron was still getting emails. Certain notices, like the courtesy notice, are only sent by email. Even if the notice preference field is set to “phone”, the patron will still get certain notices by email. If there is a problem with the patron accessing their email, delete the email field in the patron record to prevent them from receiving emails.

## **VIII. Next Circulation Committee Meeting: October 24, 2023, 1:00 pm, via Zoom.**

# SIERRA 6.0 Enhancements/Fixes (to be effective 10/25)

## Accessibility improvements in the SDA (Sierra Desktop application)

The user interface in the SDA has been updated to better support screen readers for Sierra staff users. Improvements have been made to the login screen, pop-ups, and other windows used in Circulation functions and to record editor screens.

Optionally, enable "Use accessibility mode" in Admin | Options | Edit tab to make the record editor easier for screen readers and other assistive technology to interpret. Restart the SDA to pick up the modified configuration.

## Blank pickup location on title paging list for volume-level holds--corrected

Woodstock PL Adult AV - WOLY-11

DVD 998 ENC      b19212896

Author

Encounters at the end of the world [videorecording]

Ed:                      Vol:                      DISC 1-2

Chatsworth, CA : Distributed by Image Entertainment, [2008]

Pickup at:null                      31567002135904

## Display due date and status in Holds/Bookings view

Sierra will display both the status and the due date of checked-out items when searching the catalog so that staff can easily differentiate between normal checked-out items and those that have additional status information.

Summary

View:

| # | Recnum    | Call Num  | Barcode        | Location | Due Date          | Holds | Bookings |
|---|-----------|-----------|----------------|----------|-------------------|-------|----------|
| 1 | i43006590 | 979.1 MEL | 38526000030700 | mostk    | 01-17-2027 REPAIR | 0     | 0        |

## SIERRA 6.0 Enhancements/Fixes (to be effective 10/25)

### Display statistical group name in item record

Sierra will display the descriptive name of the statistical group in the checkout location (OUT LOC) and checkin location (IN LOC) in the item record. Reminder! Information from the previous transaction is stored until the next transaction occurs.

| i80376058 Last Updated: 09-01-2023 Created: 02-25-2019 Revisions: 161 |                    |                    |                    | i91304635 Last Updated: 09-07-2021 Created: 08-29-2019 Revisions: 156 (Not In Scope) |                     |                    |                     |
|---|--------------------|--------------------|--------------------|--|---------------------|--------------------|---------------------|
| Item Code 1   | 1024               | Checkin Location   | 781                | Copy No.   | 1                   | Inventory Date     | - -                 |
| Item Code 2   | - ---              | No. of Renewals    | 1                  | Item Code 1  | 1024                | Checkin Location   | 727 R A Sapp Mem TL |
| Item Type   | 0 Book             | No. of Overdues    | 2                  | Item Code 2  | - ---               | No. of Renewals    | 0                   |
| Price   | \$26.00            | Overdue Date       | 09-01-2023         | Item Type  | 0 Book              | No. of Overdues    | 0                   |
| Checkout Date   | 07-10-2023 03:10PM | Item Use 3         | 0                  | Price  | \$26.00             | Overdue Date       | - -                 |
| Checkout Location   | 16                 | Recall Date        | - -                | Checkout Date  | - -                 | Item Use 3         | 0                   |
| Due Date  | 08-18-2023         | Total Checkouts    | 31                 | Checkout Location  | 727 R A Sapp Mem TL | Recall Date        | - -                 |
| Patron No.  | 1687272            | Total Renewals     | 3                  | Due Date   | - -                 | Total Checkouts    | 21                  |
| Last Patron   | 1961380            | Last Checkout Date | 05-04-2023 10:59AM | Patron No.   | 0                   | Total Renewals     | 5                   |
| Last Checkin  | 05-23-2023 10:01AM |                    |                    | Last Patron  | 1402600             | Last Checkout Date | 07-30-2021 01:13PM  |
|   |                    |                    |                    | Last Checkin   | 08-31-2021 03:55PM  |                    |                     |
| Local Dewey Call Number   | 099                | FIC OWE            |                    | Call No.   | 099                 | FIC OWE            |                     |
| Barcode   | 30104000056287     |                    |                    | Barcode  | 30065000813920      |                    |                     |
|   |                    |                    |                    | Internal Note  | AMAZON              |                    |                     |

### Update permissions for Manage Holds

This enhancement revises the permissions needed to modify holds using Manage Holds. Modifying holds will now require only permission **45** (Holds Management). (Previously, staff also needed edit permission for the hold's record type, e.g. Update bibliographic records to modify bib-level holds.)

This enhancement allows you to modify a hold (i.e., change pickup location) directly within the Manage Holds screen.

### View item status change date

Starting in Sierra 6.0. Sierra will display the last date an item status was updated when a user hovers over the status field in an item record.

Note: the last\_status\_update field will be empty until the item's status changes after the library has upgraded to Sierra 6.0.

## View patron record from Holds screen

This enhancement allows an authorized staff member to see the patron information when viewing an item, volume or bib-level hold in order to easily identify the correct patron in the holds queue. When you right click on an entry in the holds list, a new option to View Patron is now available.

**b27854085**

Title **Joe Bell (DVD) [videorecording].**  
Publication Info. **[United States] : Vertical Entertainment, 2021.**  
Edition **Widescreen ed.**  
Standard No. **\$13.49**  
Standard No. **843501036099**  
Standard No. **14326684**

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**Summary**

**Bib-Level Holds** 6

**Bib-Level Holds**

[Add Patron](#) [Cancel Holds](#) [Modify Holds](#) [Ch...](#)

| All                                 | # | Date Placed        | Patron Name | Patron Type | Pickup At | Limit To | Not Before | Not After          | Hold |
|-------------------------------------|---|--------------------|-------------|-------------|-----------|----------|------------|--------------------|------|
| <input checked="" type="checkbox"/> | 1 | 09-01-2021 02:18AM |             | MK-REGULAR  | mk        |          |            | 09-01-2022 02:18AM |      |
| <input type="checkbox"/>            | 2 | 09-03-2021 08:08AM |             | WO-REGULAR  | wo        |          |            | 09-03-2022 08:08AM |      |
| <input type="checkbox"/>            | 3 | 09-06-2021 04:10PM |             | DK-REGULAR  | dk        |          |            | 09-06-2022 04:10PM |      |
| <input type="checkbox"/>            | 4 | 09-06-2021 04:39PM |             | RP-REGULAR  | rp        |          |            | 09-06-2022 04:39PM |      |
| <input type="checkbox"/>            | 5 | 09-07-2021 07:39PM |             | KR-REGULAR  | kr        |          |            | 09-07-2022 07:39PM |      |
| <input type="checkbox"/>            | 6 | 09-07-2021 11:01PM |             | RP-REGULAR  | rp        |          |            | 09-07-2022 11:01PM |      |

Context menu options: Copy, Modify Hold, Cancel Hold, Change Priority, Print Table, View Patron (circled)