PRAIRIECAT CIRCULATION COMMITTEE
AGENDA
April 23, 2019
1:00 PM
GoTo Training
The PC Circulation Committee will meet Tuesday, April 23, 2019, 1:00 pm via GoTo
Meeting. To join the GoTo Meeting, please visit:

https://attendee.gototraining.com/r/6155276489950941697

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 and introductions

2. Approval of Minutes for 02/26/2019

3. Pending Projects/Updates:
    a. FY20 election – expiring seats are Alexander, Butler, Smith, Thompson, all
       eligible to run again
    b. ALT ID issue in Encore
    c. Payment issue in Encore
    d. Review of circulation manuals

4. New topics
    a. Clarify wording in Policy & Procedures manual regarding waiving of fines
    b. Scopes for adult and young adult (demo)
    c. New weekly email for bib-level holds on bibs with volumes
    d. Other updates or concerns?

5. Membership update – N8 update

6. FY2019 projects
    a. Badging program / skills checklists / strategic plan initiatives

7. Tabled projects
    a. Auto renewal project
    b. Unique ID – eliminating extra digit for duplicates / duplicate checking

8. Next Circulation Committee meeting: June 25, 2019, 1:00 pm, GoTo Training

PRESENT ON GOTO: Alexander (CL), Augsburger (PC), Bahr (FO), Bonny (PC), Butler (WL), Christiansen (MX), Dale (RL), Hutchinson (PC), Jensen (PC), Lien (PC), Sebille (SL), Slanicky (PC), Slazyk (PE), Smith (RO), Sullivan (PC), Thompson (KK), Watson (HC), Zanelli (PC)

ABSENT: (None)

VISITORS: Abernathy-Morris (NL), Calbow (UE), Miller (UE), Posing (MN), Schoess (RP), Zielezinski (NL)

1. **Welcome and introductions**

2. **Approval of Minutes for 10/23/2018** – Smith (RO) made a motion and Butler (WL) seconded to approve the October 23, 2018 minutes as written. Motion passed.

3. **Pending Projects/Updates:**
    a. **Auto-renewal project update** – Lien (PC) updated that she has been testing auto-renewal but there are issues. It is designed to use the courtesy notice, and renew eligible items at the time of that notice (3 days before due date) and then inform the patron on that notice. However, it is complicated and confusing in our large consortium. Getting the wording clear on the notice is one issue. Also, depending on who owns the materials, patrons could get a lot of mixed messages. If not every library wants to participate, that is confusing to patrons who don't always know materials they check out are from different libraries. Also, PrairieCat has been generous with three renewals on many things, but that means patrons could keep materials a long time if they auto-renew. May lower checkout statistics and fine revenue. Can request changes/enhancements to auto-renewal in Idea Lab. Butler (WL) made a motion, Smith (RO) seconded to table this for now and everyone agreed.

    b. **Different hold screens since upgrade** – sent to software engineering at Innovative – libraries supplied screen shots from the last circulation meeting. Innovative acknowledged that it is a problem and sent it to software engineering. Sometimes software engineering will make a fix without saying anything. We will be moving to a new version of Sierra in a few weeks and it may get fixed then.

    c. **Resource Sharing Committee reviewed "new" item timeframe on November 7 and made no changes** – the committee reviewed the 15-week time period for "new" items. The committee decided to leave it at 15 weeks, but libraries are welcome to take their items off "new" sooner. You do not have to use all of the "new" item types. Some libraries only use them for DVDs.

    d. **Holds for non-PrairieCat reciprocal borrowing patrons** – Lien (PC) has holds for non-PrairieCat reciprocal borrowing patrons set up for two libraries to test,

Byron and Peru. Individual libraries can allow non-PrairieCat reciprocal borrowing patrons to place holds, but for local holds only. This option is completely optional for libraries, especially if nearby libraries are offline or standalone. Open a Help Desk ticket if you want to use it.

e. **Fines paid locked screens** – as of a recent Sierra upgrade, the fines paid screen locks when a payment is made. This is a staff and patron education issue, to close the screen as soon as the fine is paid and have patrons close it at home. There were issues for several months with exporting the Fines Paid report, but that has been fixed. The fines architecture was completely rebuilt last August. Dale (RD) had it happen yesterday. She paid the fine and a screen came up that the payment could not be done at this time. If you close the screen and go back in, it works OK. Two users cannot pay fines for the same patron at the same time.

f. **Unique ID** – **eliminating extra digit for duplicates / duplicate checking –** Western and Northern PC libraries use unique IDs a lot, but the Eastern libraries not as much even though it is supposed to be required for public libraries. Libraries like it as a search method when searching new patrons before assigning them a new library card. It is a nice way to search and find duplicates for popular names. Public libraries are required to use unique IDs for library cards. The Northern8 libraries use unique IDs like PrairieCat. There will be some duplicate unique IDs when the data from the Northern 8 libraries are loaded. Currently, PC adds an extra digit for duplicates. We may not need the extra digit because this is a phrase search and searches left to right and truncates. It will bring up all matches if there are extra digits. Do we want to stop using the extra digit when there is a duplicate unique ID? You will get a message that the unique ID is a duplicate and you are prompted if you want to add an extra digit at the end. Innovative cannot add the extra digit when they add the Northern 8 libraries. Dale (RD) stated that if you add a digit to the end of the unique ID, the software does not tell you if it is a duplicate. There could be several patrons with a "2" at the end that are duplicates because the software does not alert you when you enter the unique ID. Landis (PC) said it only works for searching if everyone uses it the same way. Slazcyk (PE) uses it to catch patrons if the name is spelled incorrectly or for Jr. or Sr. Jensen (PC) ran a report during the meeting and reported there are 204 patrons in PrairieCat with duplicate unique IDs. Will table for now.

g. **Hold prioritization by delivery hub** – The Resource Sharing Committee agreed that PrairieCat would reintroduce some hold prioritization. This will be discussed at the upcoming PC member updates in March. Previously, we used to prioritize holds down to the delivery route. Will now prioritize holds by delivery hub (Bolingbrook, Coal Valley, Rockford). It would pick a library in your area so you can get it faster. This change needs to be done when the Northen8 libraries go live around mid-May. If a library in your delivery hub does not own it, the hold will go to any PC library. Is reversible if we do not like it. In the future, it could be further prioritized by delivery route.

h. **Review of circulation manuals** – feedback is welcome from anyone on the committee for the circulation manuals and will be passed on to the training committee.

4. **New topics**
   a. **Scopes for adult and young adult** – this was requested a couple of years ago and was added to the Northern8 migration and Innovative staff are currently working on it. Should go live on the production server in the beginning of April. Can limit searches to only adult or only young adult. It is based on the item level locations. If a library has everything in "stacks", you cannot accurately include the items at those libraries. However, if some libraries have items with a certain level of location code (e.g. Adult Fiction) the bibliographic record will be included in the search result.

   b. **FY20 election** – expiring seats are Alexander, Butler, Smith, Thompson, all eligible to run again – the election will be in May. Four new members are needed and current members can be re-elected. Let Landis (PC) know if you are interested in volunteering. Alexander (CL) will not be running again.

   c. **Other updates or concerns?**

      i. **Overdue notices from other libraries** – Dale (RL) recently received overdue notices sent to their library instead of to the patron. The notices need to be sent directly to the patron, not the patron's home library. The system uses the owning library of the item, regardless of which library the patron belongs to. Sullivan (PC) said that all phone notifications are generic. A computer voice tells them what the items are and does not identify the library. Hold notifications identify the library where the item is being held for pickup. Overdue notices come from the library that owns the item.

      ii. **Limits on borrowing** - Patrons are getting loan limits when the checkout library does not use them. The system uses item location and patron type for limits by format. Geneseo used a limit of six DVDs checked out because two patrons were checking out 99 DVDs. Dale (RL) reported that if another library has a limit of three and your library has 10, it stops the patron at three items. It counts what the patron already has checked out from another library. Patrons at RL are allowed to check out 10 DVDs, but if a patron's home library only allows five, it stops the patron at five. If the patron's home library has a higher limit, the software will not stop the patron at 10 items, but staff stops them at the higher level. If you currently do not use a limit and the software is alerting you that the patron is over their limit, open a Help Desk ticket. RL staff does not look at the patron's record to find out how many items they already have checked out. They look at how many items the patron brings to the circulation desk. It is too much work to keep track of what libraries in the area are doing. You could have a list at your library with the limits at the surrounding libraries if you want. Butler (WL) said if a patron gets five items on hold and the patron can only have three more items, the patron has to choose three and library holds the other two for a week, which persuades the patron to return the items sooner. If your patrons are not limited, you should not get the message. Send examples if the limits are not working correctly at your library.

      iii. **New Lenox items going to other libraries** - NL has asked PrairieCat to limit the number of items that non-PrairieCat reciprocal borrowers can check out to five items. Because of this, all NL item locations are in the D – Misc – item

limiting table. This causes a problem when a NL item goes to another library that also limits miscellaneous items in table D (typically hotspots or videogames). Reddick staff sees the block message frequently, but lets the patron check it out in spite of the alert. Judy will follow up with NL on this issue. The plan is to add a special patron type for NL so the limit can be controlled by circulation rules, not limits by format.

    iv. Patron photos - Landis (PC) asked if anyone was interested in storing photos of their patrons in Sierra? RL keeps signature cards and would consider patron photos.

    v. Patron signatures - Need signature on file that the patron is responsible for lost/damaged materials. Libraries are more interested in storing signatures in Sierra than they are photos.

    vi. New barcodes for existing patrons – the Circulation I manual page seven states that when you assign a new barcode to an existing patron, you copy the old barcode to a note field. Some libraries do this, some do not. This procedure is left over from Sirsi. Sierra uses the record number. You could track how many times a patron replaces their card and can start charging them. Libraries are finding that the patron loses their new library card, finds their old card, which is now no good, and has to buy a new card. The old registration card can show the old barcode numbers. Slanicky (PC) deletes the former barcode.   Keeping track of old patron barcodes could be a local library decision.

    vii. PC Member updates in March - Send suggestions for the March PC member updates to any PC staff member.

5. **Membership update – N8 and Byron Schools** – PC staff are working on the 8 libraries in the Rockford area to join PC to go live for cataloging the week of April 23, then circulation will go live May 21st. You will see their items and bibs loaded in April and patrons loaded in May. Byron Schools are a new union list member and because of some staff turnover, PC staff are working with them to get back on schedule.

6. **FY2019 projects**
   a. **Badging program / skills checklists / strategic plan initiatives** – Augsburger (PC) is working on badging for classes taken in Talent MLS (new software for online training). You will get a certificate when you complete a class, which will be good for 5 years. If you leave one PC library and go to another PC library, you do not need to take the class again unless it has more been more than 5 years. More information to come.

   b. **Customizing brief record display** – this is a possible future enhancement topic.

7. **Next Circulation Committee meeting: April 23, 2019, 1:00 pm, GoTo Training**

Welcome Northern8 Libraries!

Eight libraries that were formerly in the NIC consortium are joining PrairieCat and will go live on Sierra functions over the next few weeks. Here are some key dates for the final migration.

- **April 8 – 19, 2019** – Innovative will load bibliographic records and item records for the eight Northern8 libraries that are joining PrairieCat. This means approximately 900,000 items will be added to PrairieCat. These materials will be non-holdable until May 22nd. If patrons ask staff about records in Encore that have no holdable items during this period, please inform them that the materials will be available for holds in late May. This is a big data load, but it should not effect searching or regular routines for existing PrairieCat members.

Please note: initially, Northern8 libraries' multivolume items will not be linked to volumes, but PrairieCat and Northern8 staff will be working diligently to get items linked to volumes correctly before their collections are holdable.

- **By April 23** (or whenever the bibliographic and item load is completed) – the Northern8 libraries will **go live on Sierra for cataloging**.

- **Monday, May 6 – t**he Northern8 libraries will **go live on Sierra for acquisitions and serials**.

- **Monday, May 13** – the eight Northern8 libraries' patrons records will be added to Sierra. These patrons will not be able to place holds until after the circulation migration. As soon as the patron load is completed, the Northern8 libraries will begin adding new patrons to Sierra as they issue new library cards.

Please note: there will be existing PrairieCat patrons that have used NIC libraries that will have duplicate patron records in Sierra after the load. PrairieCat staff will be working digilently to merge duplicate records that week before the circulation migration. Checkouts, holds and fines will move over to the home library record of the patron during the merge process.

- **Sunday, May 19** – pickup locations for the Northern8 libraries will be added to Sierra. Patrons should be encouraged to not route materials to the new libraries until they are live on the 21st. Hold prioritization by delivery hub will also be added for all PrairieCat libraries.

- **Monday, May 20** – circulation transactions for the Northern8 libraries will be loaded into Sierra. The circulation migration is expected to take one day, and on that day the Northern8 libraries will be using offline circulation for checkout only. Once the circulation migration is completed, PrairieCat staff will upload the offline circulation files. Northern8 patron holds will be loaded in to existing hold queues in the order of the date placed. All of the eight libraries will be using "new" item types which will follow normal PrairieCat hold priorities.

- **Tuesday, May 21** – it is expected that the Northern8 libraries will **go live on Sierra for circulation**.

- **Wednesday, May 22** – patrons of the Northern8 libraries will be allowed to begin placing holds on PrairieCat. The collections of the eight libraries will also become holdable by all PrairieCat patrons.

- **Thursday, May 23** – the first Paging Lists will be generated for the Northern8 libraries and they will begin filling holds.

Other FAQ:

New library codes:
Sierra code / name / delivery code
BL – Ida Public Library (Belvidere) – IPLY-11
CH – Cherry Valley Public Library District – CHVY-11
HR – Harvard Diggins Library – HRLY-11
KR – Nippersink Public Library District (Richmond) – NPLY-11
LP – North Suburban Library District, Loves Park – NSLY-11
LR – North Suburban Library District, Roscoe – NSRY-11
RU – Rockford University – RKC-ILDS
TF – Talcott Free Library District (Rockton) – TRLY-11
WO – Woodstock Public Library, WOLY-11

New material types:
Two new bibliographic material types have been added to Sierra as a result of adding these new libraries:

Digital Image
Slides

If you find bibliographic records that should have the material type updated to one of these new values, please open a Help Desk ticket.

New settings: YA/Adult Scopes and Hold Prioritization.
We also wanted to remind you of two other consortia-wide changes that are happening as sub-projects with the Northern8 project:

YA/Adult Scopes – Several years ago during the PrairieCat planning process, member libraries identified that it would be useful to have an "All Adult" and an "All Young Adult" limiting feature in Sierra and Encore, similar to the existing "All Juvenile" limit. These limits are built on item-level locations, and grouped into new scopes. The limiting may not be 100% accurate particularly for members that don't have item-level locations that specify adult or young adult materials. Both item level locations and the scopes they are included in can be tweaked in the future as needed. The Adult and Young Adult scopes are going live in Sierra and Encore at the beginning of April, before the final load of Northern8 holdings. If your search yields results that are in one of the age scopes, you'll see the option to limit using the facets on the left. In Sierra, you will be able to limit to your library's adult results or young adult results.

Friendly reminder: ONLY five letter locations codes, e.g. byafi, should be used in item records in Sierra. No item record should contain a three letter

code, so never add xxa (e.g. bya), xxj (e.g. byj), or xxy (e.g. byy) to an item record. Also, patron records should ONLY contain a two letter library code, e.g. by.

Hold Prioritization -- The PrairieCat Resource Sharing Committee approved adding a new level of hold prioritization in Sierra for PrairieCat libraries. This prioritization particularly applies to how paging list requests are processed. At about the same time that the Northern8 libraries go live on PrairieCat in May, we will be adding prioritization by delivery hub. The three delivery hubs are Bolingbrook, Coal Valley and Rockford. In Sierra, new settings added in May will mean that requests for libraries in, for instance, the Bolingbrook hub, will be prioritized to be randomly filled by other libraries in the Bolingbrook hub. If the material is not available at a library in that hub, the request will then randomly be sent to a library in the other two hubs with an available copy. These are settings that can be further adjusted in the future if needed. The goal is that fewer items will need to travel between delivery hubs and requests can be filled in a timely manner.