PRAIRIECAT CIRCULATION COMMITTEE
AGENDA
February 23, 2021
1:00 PM via Zoom

The PC Circulation Committee will meet Tuesday, February 23, 2021, at 1:00 pm via Zoom.

Please register in advance for this meeting:

https://railslibraries.zoom.us/meeting/register/tJUud-iorDorHtYJPhqshUtseysIsZCsENtI

After registering, you will receive a confirmation email containing information about joining the meeting.

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.*

The meetings are open meetings, so anyone is welcome to attend, but voting is limted to the 11 committee members

I.   Welcome

II.   Roll call for attendance

III.   Review agenda for additions/corrections

IV.   Approval of minutes from August 25, 2020

V.   Pending Projects/Updates

VI.   Training

VII.   New topics

        a. Processing of Old Billed Items
        b. View Outstanding Holds one-on-one training available
        c. Upgrade to Sierra 5.2 on 02/17/2021 and known issues (attachment)

        d. Item type - is the current item type framework too restrictive for your current needs?

VIII.   Demonstration

        a. Look up patron bills once an item has been deleted using Create Lists function

IX.   BYPT "Bring Your Problems Time"

X.   Next Circulation Committee meeting: April 27, 2021, 1:00 pm, via Zoom

PRAIRIECAT CIRCULATION COMMITTEE
DRAFT MINUTES
August 25, 2020
1:00 pm via Zoom

MEMBERS PRESENT: Abernathy-Morris (NL), Bonny (PC), Cox (EM), Hansen (PC), Jensen (PC), Landis (PC), Sebille (SL), Slanicky (PC), Slazyk (PE), Smith (RO), Sullivan (PC), Watson (HC), Zamorano (WO), Zanelli (PC)

MEMBERS ABSENT: Smith (PC), Studer (HD), Wilhoyt (BD), Wood (RO)

GUESTS: Butler (WL), Calbow (UE), Cowden (BR), Dale (RL), Fine (PR), Hoffman (TC), Kozinski (DK), Miller (UE), Munger (LP), Newman (HR), Posing (MN), Schoess (RP)

I. **Welcome** – Watson (HC) welcomed everyone.

II. **Roll Call for Attendance**

III. **Review Agenda for Additions/Corrections** – Added to **New Topics** section: Need a new chair as well as a co-chair and View outstanding holds report. Added to **Friendly Reminders** section: Bib holds for work purposes.

IV. **Approval of minutes from June 23, 2020 -** Abernathy-Morris (NL) moved and Slazyk (PE) second to accept the June 23, 2020 minutes as written. Motion passed.

V. **New PrairieCat Staff** – Two new PrairieCat staff started at the Coal Valley office in July. Roy Arey, senior systems specialist, and Chelsey DeSplinter, human resources/administrative assistant.

VI. **Pending Projects/Updates**

a. **OHM Project** – Slanicky (PC) gave an update on the OHM Project. For the last 20 years, starting every 3 months, and then switching to monthly, the PrairieCat holdings have been updated at OCLC. A company in Florida called TMQ (The MARC of Quality) checked monthly for adds and deletes for the various LLSAPs in Illinois, then combined this information and passed it on to OCLC to update the member libraries' holdings in OCLC. TMQ announced their pending retirement two years ago and the state began looking for a new vendor. No vendor was identified to provide the service we needed.

There was the possibility of buying the software from TMQ, however that option did not work. RAILS hosts an annual LLSAP meeting and the catalogers brainstormed what could be done. SWAN staff was able to write a program called OHM (OCLC Holdings Manager). In mid-July of 2020, a file was processed for the month of June without any problems. The end result is that PrairieCat can seamlessly continue to update OCLC holdings for the member libraries.

VII.   New Topics

a. **New chair and co-chair needed** – Both a chair and co-chair are needed. Hansen (CH) volunteered to chair for the remaining three meetings of this year. Watson (HC) agreed to co-chair. Abernathy-Morris (NL) made a motion and Cox (EM) seconded to approve. Motion carried.

b. **Virtual PUG Days, Webinars** – PUG Days are virtual this year. Smith (PC) put together a series of webinars, which are listed on the PC website at https://support.prairiecat.info/conference. All presentations are being recorded and are available on the website.

c. **Processing of Old Billed Items** – For the old billed items, search the shelves and check in any that are found. If not found, just leave the item the way it is and let the software take care of it. With COVID-19, we are six months behind in processing the old billed items report. Landis (PC) gave members two options. Option 1: In September, run a report for all 6 months. You would have one month to search for all of the items. Option 2: In September, run the report for two months at a time until we are caught up. Voting was 50/50. It was decided to go with the two-month option.

d. **Available Holds Notices Project** – Landis (PC) and Sullivan (PC) have completed the project of making separate rules for each library for the holds notices. When libraries reopened with curbside service only, they wanted to turn off their holds available notices so patrons were not showing up to pick up items that were not ready to be picked up yet.   At the time, the only option was to turn it off for everyone. Now each library has their own rule and they can be turned off for one library at a time. An email will be sent to the libraries explaining how it will work.

e. **View Outstanding Holds Report** – Circulation staff at every library should work with the View Outstanding Holds report on a weekly basis. This report shows all outstanding holds for your library. Landis (PC) has been working on a training video that should be available this week on TalentLMS.

In the Clear Expired Holds and Holdshelf function in Sierra, there is an option to clear Expired Holds, however you may see that option is grayed out and you cannot select it. Innovative has indicated that option will not be available if there are no holds that fit the criteria. This can be confusing because when you view the Outstanding Holds report, it looks as though there are expired holds that need to be cleared.

Landis (PC) demonstrated that when a hold is trapped, Sierra converts it from a title-level or volume –level hold to an item hold because a specific item is now filling that hold. If the library staff decide the item cannot go the patron (i.e.: damaged or missing pieces), checking in the item a second time will change the item's status to available, but it will not transfer the hold from an item-level hold. The hold will continue to sit as an item-level hold with a status of in-transit on the hold record. Note that you cannot see this status in Sierra. You do want to encourage your staff to not check items in a 2nd time, but if that happens, you will need to transfer the hold or cancel it and replace the hold. Otherwise the hold will remain as an item-level hold and will not be filled.

VIII. **Training (TalentLMS)** – The first 3 circulation classes are now available in TalentLMS, along with 2 series of classes on how to place holds and how to search. Several survey responses have requested accompanying documents for the classes and those are available in PDF form for many classes in the Content section for the course.

IX. **Friendly Reminders**

a. **Holds for Work Purposes** – Please do not use your personal library account when placing holds for work purposes; use a properly labelled account such as repair, story hour, etc.

b. **Marking Items for Discard/Withdrawal** – When marking items for discard/withdrawal, please make sure that there are no item holds and that the item is not checked out. If there are item holds or the item is checked out, the item will error out of the delete process and Landis (PC) has to correct those items manually.

X. **Quick Click Records and Volume Records** – An order for a multi-disc item needs to have a volume record attached at the time the item record is entered into Sierra. Log a Help Desk ticket if you see bib level holds that should be volume level holds.
Prior to March, Landis (PC) was sending an email to circulation staff on a weekly basis that listed bib level holds that had been placed on records with volume holds. She will resume sending the emails next week.

XI. **Tabled Projects** –
   a. **Auto Renewal Project** – The auto renewal project remains tabled for now.

XII. **BYPT "Bring Your Problems Time"**

   a. **Generic Records for Hotspots** – It was asked when member libraries can expect to see generic records for hotspots. Tedder (PC) is on vacation this week and has already corrected everyone's hotspots. Having several library's items on one hotspot record caused problems with bib level holds and item level holds had to be used. Tedder (PC) split up the generic hotspot records so each library has its own record for hotspots and each library can place bib level holds for their own items. You can search the library as a title to find them. You can create a link on your Facebook page to take the patron to the hotspot record for your library. Log a Help Desk ticket if you need a hotspot record for your library.

   b. **When to use Generic Records** – Generic records are usually used for holdings not in OCLC that won't be loaned outside of PrairieCat.

   c. **Curbside Apps** – The User Experience meeting that is coming up will discuss the Capira app.

XIII. **Next Circulation Committee Meeting: October 27, 2020, 1:00 pm, via Zoom**

Adjourned at 1:43 pm.

SIERRA 5.2 KNOWN ISSUES

CIRCULATION

Description	Key	Reported in Version	Date Added	Resolution
Exporting to Excel in Fines Paid stores numeric and money fields as text When exporting to Excel from Fines Paid (using "Open in Excel"), numeric and monetary data fields display a warning and the message "The number in this cell is formatted as text or preceded by an apostrophe." The fields must be converted to numeric type before Excel will perform numeric operations such as summing. Similar issues in Statistics with numeric fields (SIERRA-32767) and money fields (SIERRA-33011) are fixed in Sierra 5.2 and 5.3, respectively.	SIERRA-33746	Sierra 5.1	2020-12-08	Fixed in Sierra 5.3
Modifying pickup date for items with out-of-scope pickup location At libraries that restrict staff from editing items and orders that are outside their login's scope, staff also cannot extend the pickup date for holds whose pickup location is out of scope.	SIERRA-33015	Sierra 5.1	2020-12-16	Unresolved
Slow holds tab for a patron with many holds When a patron has a large number of holds (150+), opening the patron's holds tab takes about 10 seconds.	SIERRA-32159	Sierra 5.1	2020-11-24	Fixed in Sierra 5.3
Express Lane checkout of held item does not remove the filled hold When a patron uses Express Lane to check out an item that is on hold for them, the hold is not removed. This happens only when the Blocking Held Items at Self Check-out feature has been configured not to block checkout of items that can fill holds for other patrons. The problem can be avoided by choosing any of this feature's other configuration options.	SIERRA-31850	Sierra 5.1	2020-07-24	Fixed in Sierra 5.3

No record written to Fines Paid when a billed item is renewed and the bill automatically adjusts to zero When staff renew a billed item, and the [automatically adjusted charge](#) is zero, nothing is written to Fines Paid. Sierra should record the removed replacement charge to Fines Paid with a payment status of "no payment," to indicate that the item had previously been billed but that the bill has been automatically adjusted. (If the charge adjusts to an amount other than zero, Sierra does write correctly to Fines Paid.) This issue was found on Sierra 5.0 but is almost certainly not new.	SIERRA-33529	Sierra 5.0	2020-12-20	Unresolved
Patron not removed from collections when no recent Fines Paid record exists If a patron is in collections, and all outstanding charges are removed without writing to Fines Paid, the patron will not be removed from collections even though they no longer owe any money to the library. This could occur if the library chooses to purge fines without writing to Fines Paid or if a software issue causes a fine to be removed without a Fines Paid entry (for example, see KI SIERRA-33529).	SIERRA-33528	Sierra 5.0	2020-12-29	Unresolved
Bibs with expanded Material Type do not appear in High Demand Holds Bib records with 2- or 3-character Material Type codes do not appear in the High Demand Holds report.	SIERRA-31712	Sierra 5.0	2020-12-29	Unresolved
Blank PIN field in new patron record When creating a new patron record in Sierra using a patron record template, the PIN field appears blank until the record is saved.	SIERRA-29950	Sierra 4.3	2019-06-20	Fixed in Sierra 5.3
Incorrect Not Wanted After for replaced holds When replacing a hold, the new hold has a Not Wanted After date in January 2038 instead of following the login's Default Not Wanted After Date configuration.	SIERRA-31833	Sierra 4.2	2020-11-24	Fixed in Sierra 5.3

Cannot send notices after printing the table of notices After preparing a notice job, if staff click the "Print" button to print the table, they cannot then send the notices. Clicking "Send Notices" will result in an error message: "Failed to print notices. Unable to initialize notices sending."	SIERRA-30239	Sierra 4.1	2020-12-16	Unresolved
2038 NNA date in View Outstanding Holds A Not Needed After date for 2038 appears in View Outstanding Holds for holds placed via the SDA without a specifying a NNA date.	SIERRA-24148	Sierra 2.2	2019-05-22	Fixed in Sierra 5.3
Hold notes in View Outstanding Holds When a bib record has multiple holds, and the first hold in the queue has a hold note, View Outstanding Holds displays the same hold note for every other hold on that bib.	SIERRA-30633	Sierra 1.1.3	2020-12-10	Fixed in Sierra 5.3