

PRAIRIECAT CIRCULATION COMMITTEE
AGENDA
June 28, 2022
1:00 PM via Zoom

The PC Circulation Committee will meet Tuesday, June 28, 2022, at 1:00 pm via Zoom.
To join the meeting, please visit:

<https://railslibraries.zoom.us/meeting/register/tJUvfu2qqTwiGNLT7ndF2Ko1jRVQabEWuoLW>

These are open meetings and everyone is welcome to attend and to contribute, but only the committee members may vote.

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.

- I. Welcome
- II. Roll call of committee members for attendance
- III. Review agenda for additions/corrections
- IV. Approval of minutes from April 26, 2022
- V. New topics
 - a. Election results
 - b. New co-chair needed
 - c. Upgrade to Sierra 5.4 (see attachment for enhancements and known issues)
 - d. Change to non-resident cards legislation for non-residents under the age of 18
 - e. Help desk changes
 - f. Reminders about eCommerce
 - g. In-process items
 - h. Updates on membership
- VI. Pug Day 2022
- VII. BYPT "Bring Your Problems Time"
- VIII. Next Circulation Committee meeting: August 23, 2022, 1:00 pm, via Zoom

**PRAIRIECAT CIRCULATION COMMITTEE
DRAFT MINUTES
April 26, 2022
1:00 pm via Zoom**

MEMBERS PRESENT: Abernathy (NL), Bonny (PC), Cox (EM), Dale (RL), Hansen (CH), Jensen (PC), Landis (PC), Sangston (MA), Slanicky (PC), Slazyk (PE), Smith (PC), Smith (RO), Tedder (PC), Watson (HC), Wiegert (PT), Zamorano (WO), Zanelli (PC).

MEMBERS ABSENT: Wood (RO).

GUESTS: Badger (SR), Brozovich (RP), Christiansen (MX), Fine (PD), Finney (JC), Hoffman (TC), Ippolito (RP), Kozinski (DK), Nobling (RP), Perry (MV), Posing (MN), Schultz (BL), Shelton (NL), Thomas (MX), Thompson (KK), Yoeckel (SN), Zielezinski (SA).

- I. Welcome** – Watson (HC) began the meeting and welcomed everyone.
- II. Roll Call of Committee Members for Attendance**
- III. Review Agenda for Additions/Corrections** – No additions or changes were made to the agenda.
- IV. Approval of Minutes From February 22, 2022** – Cox (EM) made a motion and Dale (RL) seconded to approve the February 22, 2022 minutes as written. Minutes approved.
- V. New Topics**
 - a. Call for Nominees for the FY23 Election. Nominations Accepted Until 4/29** – Nominees are needed for the FY23 election. There are four terms that are expiring this year. All four tiers have a position available: tier 1, 2,3, and at large. Tiers are based on the fees libraries pay to PrairieCat. You can find your library’s tier here: <https://support.prairiecat.info/finance>. The deadline for nomination is April 29, 2022. Contact DeSplinter (PC) at chelsey.desplinter@prairiecat.info if interested.
 - b. Expiration Date Field in Patron Record. Vote Needed to Change Field From Required to Optional in PrairieCat Circulation Policy & Procedures Manual** – Several libraries have asked about using blank expiration dates in their patron records. If libraries want to leave this field blank, a change needs to be made in the PrairieCat Circulation Policy & Procedures Manual. Dale (RL) made a motion and

Sangston (MA) seconded to amend the manual to exclude the expiration date as a required field in the patron field. Motion carried and Landis (PC) will make the change in the PrairieCat Circulation Policy & Procedure Manual on page 19, Section X. Patron Entry Formats.

- c. Information on Mark Lost Item and Mark Damaged Item Functions** – See the cheat sheet in today’s meeting packet for details on the Mark Lost Item and Mark Damaged Item functions. This link will take you to the detailed Technical Bulletin #18 Managing “Problem” Items in Sierra:

https://support.prairiecat.info/system/files/Members/201812/TB18%20-%20Managing%20Problem%20Items%20in%20Sierra_0.pdf

Landis (PC) will email a new cheat sheet with the full name of the form. The cheat sheet includes brief explanations for handling lost and damaged items. For example, Mark Lost Item checks in the item and Mark Damaged Item leaves the item checked out to the patron. Sierra release 5.5 due in early 2023 has a new option of Mark Item Damaged and Add a Bill.

- d. Discussion of Patron Purge Procedure/Recommend Best Practice** – There was a long discussion on patron purge procedures and best practices for dealing with the Patron Purge report. It was suggested to add a new section to the manual:

The following are guidelines only. If your library has an established procedure, you can follow that procedure.

Accounts with overdue fines (not replacement charges or manual charges) that are \$10.00 or less on materials owned by a PrairieCat library can be purged.

- **Accounts with collection fees or manual charges for your library, it is your decision to purge.**
- **Accounts with collection fees or manual charges for other libraries that are 7 years old or less should not be purged.**
- **Accounts with bills that are fewer than 7 years old should not be purged.**
- **Accounts with bills that are older than 7 years old, it is your decision to purge.**

A motion was made by Cox (EM) and Dale (RL) to add these changes to the PrairieCat Circulation Policy & Procedures Manual regarding patron purge procedures. The motion was approved. Landis (PC) will make changes to the patron purge procedures.

- e. Reminder for End of School Year** – On April 10 the holds and paging lists for school items were turned off. Do not override holds for schools. Landis (PC) can provide a list for the public libraries who have school items checked out to their patrons. Log a Help Desk ticket if you would like a list.
- f. Spring Clean Patron Data (Optional Procedure)** – This month’s “Did You Know?” is called Spring-Clean your Patron Data. It is included in today’s meeting packet and describes how to use Create Lists to find and correct errors in patron records. If you don’t have access to Create Lists, you can open a Help Desk ticket and PC staff can run the reports for you.
- g. Demonstration of Fines Paid Function** – Landis (PC) demonstrated how to use the Fines Paid function. See the handout in today’s meeting packet for more information. You need the statistics group number for your library and can find it on the PC support site. If you are a fine free library, you can still use this function to see replacement or manual charges.
- h. Ideas for Monthly “Did You Know?” eNewsletter Column** – The “Did You Know?” eNewsletter columns for circulation topics can be found here:

<https://support.prairiecat.info/documentation/64582>

Send ideas for the “Did You Know?” column to Landis (PC) at melissa.landis@prairiecat.info.

You can subscribe to the monthly PrairieCat eNewsletter at <https://support.prairiecat.info/newsletter>

PUG Day 2022 – Smith (PC) discussed PUG Day 2022. PUG Day is the PrairieCat Users Group Day and is an annual event that we host for our members that focuses on training and professional development sessions for library staff. It usually consists of half sessions that our members host and half outside presenters. The Engagement Committee is currently accepting proposals for PUG Day sessions. Past topics include summer reading, adult programming, building projects, new employee onboarding, and customer service. PUG Day will be virtual this year on

Thursday and Friday, September 22-23. Registration will be open in the summer. If you have a short topic, there are 30-minute mini sessions available or you could be on a discussion panel with other presenters. If you or one of your team would like to do a presentation, you can submit a proposal here:

<https://forms.gle/7kPxGxwizQaigDca8>.

VI. BYPT 'Bring Your Problems Time'

- a. Patrons Getting Charged Twice** – Finney (JC) reported that some patrons are getting charged twice when a manual charge is entered in Sierra. No one else at the meeting has seen it. If this happens, waive the second charge. Log a Help Desk ticket the next time it happens so Landis (PC) can check on it.

- b. Items Returned With Damaged Note** – Zamorano (WO) reported items being returned with damaged slips that have damage so bad that the library would not have sent out the item. It has happened five times in the last three weeks from different libraries. They will contact the libraries that returned the damaged items. You can look at the last three checkouts to determine which libraries checked them out.

VII. Next Circulation Committee Meeting – June 28, 2022, 1:00 pm, via Zoom. Watson will be on vacation and Dale (RL) is co-chair and will run the meeting.

SIERRA 5.3 and 5.4 ENHANCEMENTS effective 06/21/2022

Enhancement description	Action Required
<p>CIRCULATION: The View Outstanding Holds function has been changed to the Manage Holds function. Enhancements include:</p> <ol style="list-style-type: none"> 1. Ability to transfer or cancel/correct holds directly within the Manage Holds function and refresh the display. 2. Can view the report for a date range. 3. Additional options available to limit the report based on hold status and other special limits. 4. Ability to export report to Excel. 	<p>ALL PrairieCat libraries should be working with this report on a regular basis to ensure that their patrons' holds are filled in a timely manner.</p> <p>If you would like a one-on-one Zoom training session on best strategies for working with this function, log a help desk ticket.</p> <p>NOTE: When sorting the report by title, Sierra does not ignore the leading article (to be fixed in Sierra 5.5).</p>
<p>These functions will now display the word FROZEN if a hold has been frozen by a patron: Check out, Search/Holds, Manage Holds</p>	<p>Share with relevant staff.</p>
<p>When staff place a title-level (bib or volume) hold that can be paged, the hold will be paged automatically instead of prompting the user.</p>	<p>Share with relevant staff.</p>
<p>When cancelling a hold, the pop-up will now read "Notify patron of cancelled hold?" instead of "Print hold cancel notice?".</p>	<p>Share with relevant staff.</p>
<p>NOTICES: Autonotices will not be generated on days that libraries are closed.</p>	<p>The Days Closed Table controls assignment of due dates, calculation of late charges, and now ensures that notices are not generated on closed days. Send your closed dates to datesclosed@prairiecat.info as soon as they are known!</p>

Enhancement description	Action Required
<p>CREATE LISTS: Multiple enhancements have been made:</p> <ol style="list-style-type: none"> 1. Stop range will default to the last record number wildcard (p*, i*, b*) 2. Double-clicking an empty review file will start a search. 3. Can add a row of selection criteria by duplicating an existing row. 4. Search criteria will not be cleared when changing the Store Record Type. 5. The Limited option has been changed to Current User and allows to filter the list of Review Files to those files created by your login. 	<p>Share with relevant staff.</p>
<p>KNOWN ISSUES WITH SIERRA</p>	
Issue description	Action Required
<p>No record written to Fines Paid when a billed item is renewed and the bill automatically adjusts to zero</p> <p>When staff renew a billed item, and the automatically adjusted charge is zero, no entry 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.)</p>	<p>To be fixed in Sierra 5.6</p> <p>Share with relevant staff.</p>
<p>Holds clear from holdshelf one day early after pickup date modified in Manage Holds</p> <p>After staff modify hold pickup dates in Manage Holds, the Clear Holdshelf report clears the hold on the pickup date rather than on the day after the pickup date. (For example, if the modified pickup date is Feb 17, the item should not appear on the Clear Holdshelf report until Feb 18 but appears on Feb 17.)</p>	<p>Unresolved</p>
<p>Clear Expired Holds and Holdshelf table can only sort by one column</p> <p>When staff sort the Clear Expired Holds and Holdshelf table by one column and then click on another column header to add a second sort, the table loses the first sort order. On Sierra 5.2, the first sort was retained to the extent possible (e.g. if sorting by patron name then status, holds would be sorted by status with patron names in order within each status group).</p>	<p>To be fixed in Sierra 5.5</p>

Issue description	Action Required
<p>High-Demand Holds cannot export long titles to Excel</p> <p>When the High-Demand Holds report contains bibs with titles longer than 255 characters, exporting the report to Excel creates a file that Excel cannot open. (Excel shows an error message that the file format or file extension is not valid.) As a workaround, export to CSV or tabbed text and then import the delimited file into Excel.</p>	<p>To be fixed in Sierra 5.5</p>
<p>Spaces prevent Circa from locating items by barcode</p> <p>When barcodes in item records do not contain spaces, but the barcode scanned or typed into Circa does include spaces, Circa is unable to locate the item.</p>	<p>To be fixed in Sierra 5.5</p>
<p>Rendering issues in "Mark Lost Items" dialog with 18+ font size</p> <p>When a Sierra staff login is configured with font size 18 or larger, the "Mark Lost Items" dialog in Circulation Desk only partially displays. The buttons can be revealed by mousing over them or tabbing, and they are operational when clicked.</p>	<p>To be fixed in Sierra 5.5</p>
<p>No record written to Fines Paid when a billed item is renewed and the bill automatically adjusts to zero</p> <p>When staff renew a billed item, and the <u>automatically adjusted charge</u> is zero, no entry 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.)</p>	<p>To be fixed in Sierra 5.6</p>
<p>Renewal from Checked-Out Items does not update CIRCACTIVE</p> <p>When items are renewed in Sierra by clicking the "Renew" button in the Checked-Out Items tab or in Express Lane by clicking "Renew items" in the checkouts screen, the patron's CIRCACTIVE field does not update to reflect their renewal activity. Renewing items by other methods does update CIRCACTIVE.</p>	<p>To be fixed in Sierra 5.5</p>
<p>Merging patrons does not update Highest Level Overdues block</p> <p>Merging a source patron record with overdue items into another patron record does not update the Highest Level Overdues block of the destination patron record. This can result in the remaining patron having overdue or billed items but not being blocked from circulation activity based on the Highest Level Overdue block.</p>	<p>To be fixed in Sierra 5.5</p>



**Addition of new patron code 3 values to accommodate
Cards4Kids, Disabled Veterans, and non-resident children under the age of 18**

In 2021, PrairieCat added two new patron code 3 values so that libraries could differentiate library cards issued to non-resident children under the Cards4Kids legislation and cards issued to non-resident disabled veterans. These values are:

- 25 Veteran NF (no fee)
- 26 Cards4Kids NF (no fee)

On May 13, 2022, Governor Pritzker signed legislation that allows a library board to adopt regulations to waive the nonresident fee for persons under the age of 18. In contrast to the Cards4Kids legislation which has a proof of financial eligibility component, this allows libraries to waive the fee that would normally apply. Library boards will need to decide whether they wish to adopt such a fee waiver. If they do, a new patron code 3 value has been added to accommodate those cards:

- 27 NR Kids NF (no fee)

If you need additional information regarding the issuance of nonresident cards, this link is to the FAQ document created by the Illinois State Library in August 2021. Note that this FAQ does not include the most recent change:

<https://www.ilsos.gov/departments/library/libraries/pdfs/nonresidentfaq0821.pdf>