

**PRAIRIECAT CIRCULATION COMMITTEE**  
**AGENDA**  
**February 28, 2023**  
**1:00 PM via Zoom**

The PC Circulation Committee will meet Tuesday, February 28, 2023, at 1:00 pm via Zoom. To join the meeting, please visit:

<https://railslibraries.zoom.us/j/93452724803?pwd=T0dDazNlEjlOczZCR3oyV08yTU11QT09>

These are open meetings and everyone is welcome to attend and to contribute, but only the committee members may vote. 6 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.*

- I. Welcome
- II. Roll call of committee members for attendance
- III. Review agenda for additions/corrections
- IV. Approval of minutes from October 18, 2022
- V. New topics
  - a. Discussion about how the Committee will be chaired
  - b. PrairieCat policies regarding use of materials owned by other libraries
  - c. Statistical group code
  - d. Vote required: Collection agency policy
  - e. Batch holdings (OCLC) project update
  - f. Review of Old Billed Items procedure and
  - g. PUG Day
- VI. Friendly Reminders
  - a. Free! Offer of one-on-one training session for Manage Holds function
- VII. BYPT "Bring Your Problems Time"
- VIII. Next Circulation Committee meeting: April 25, 2023, 1:00 pm, via Zoom

**PRAIRIECAT CIRCULATION COMMITTEE  
DRAFT MINUTES  
October 18, 2022  
1:00 pm via Zoom**

**MEMBERS PRESENT:** Bonny (PC), Dale (RL), Landis (PC), Linnell (BD), Sangston (MA), Slanicky (PC), Slazyk (PE), Smith (PC), Tedder (PC), Watson (HC), Wiegert (FP), Zamorano (WO), Zanelli (PC).

**MEMBERS ABSENT:** Abernathy (NL), Hansen (CH), Kitchen (EM), Kofoid (GV).

**GUESTS:** Carter (SL), Christiansen (MX), Fane (LP), Fine (PR), Gunn (EJ), Hoste (CL), Kosinski (DK), Nobling (RP), Studer (HD), Thomas (MX), Thompson (KK), VanDeWoestyne (SL), Zielezinski (SA).

- I. Welcome** – Dale (RL) began the meeting and welcomed everyone.
- II. Roll Call of Committee Members for Attendance**
- III. Review Agenda for Additions/Corrections** – No changes were made to the agenda.
- IV. Approval of Minutes from June 28, 2022** – Watson (HC) made a motion and Linnell (BD) seconded to approve the June 28, 2022 minutes as written. Minutes approved.
- V. New Topics**
  - a. Email Changes for PrairieCat Staff** – There have been several changes with the PrairieCat staff email. PrairieCat staff used to be RAILS employees, then PrairieCat became an independent organization in 2018. As PrairieCat moves toward complete independence from RAILS, one of the changes toward independence has been email. The PrairieCat staff emails originally ended in “@railslibraries.info” then became “@prairiecat.info” and now end in “@prairiecat.org”. For example, the new email for Melissa Landis is [melissa.landis@prairiecat.org](mailto:melissa.landis@prairiecat.org).
  - b. Library Email Account Changes (Formerly Zimbra accounts)** – Zimbra accounts are used for paging lists, notices, and library to library communications. These accounts are being moved from Zimbra to Office 365. Instead of being called your library’s Zimbra account, they will be called your library’s email account. Matt Maturo (PC) sent an email at the beginning of October to let libraries know that they need to login and set up a password for their new accounts.

The deadline for doing this was October 14, but the new accounts are not ready yet. You are still using your old Zimbra account. Maturo (PC) will send an email when the new accounts become available. If you have not already set up a new password for your library, see the instructions at: <https://support.prairiecat.info/news/2022-09/65671>.

- c. Vega Discover** – Vega Discover will replace Encore. There have been a couple of Vega Discover classes and there will be a Vega Discover Demo and Q&A on Zoom this Thursday, October 20, 2022 at 10 am. Innovative is actively modifying and improving Vega Discover on a bi-weekly basis. It is currently only available to library staff and should be ready for patrons in early 2023. We are waiting to be able to integrate eBooks in Vega Discover in a consortium environment. Library staff should practice using Vega Discover now. If there are things that you do not like in Vega Discover, open a Help Desk ticket to report them. To find your library’s link to Vega Discover, search your library at the PrairieCat support site (<https://support.prairiecat.info/>) using the **Quick Library Lookup** at the bottom of the screen. Click on your library name and look under **Catalog Links** to find the link(s) to your library’s Vega Discover site. The one ending in a “k” is for a kiosk site used for in-library OPAC stations. If your library doesn’t have links to Vega Discover, it means that Coulter (PC) needs more information and you should contact her at [carolyn.coulter@prairiecat.org](mailto:carolyn.coulter@prairiecat.org). An FAQ for Vega Discover is also available on the PrairieCat support site. To see it, click on **Vega Discover / New Catalog** and scroll down to the **FAQ** section at the bottom of the screen.
- d. API Key Needed for ILL Module** – An API key is needed for the ILL module to work in Sierra release 5.5. The forty-five libraries that use the ILL module have been contacted by Zanelli (PC) with instructions on contacting OCLC to request an API key. Only ten libraries have responded so far. If you have not already done so, there is a form to fill out with your library’s information at the top of the form, then sign the form at the bottom, and email the form to [legal@oclc.org](mailto:legal@oclc.org). You will receive a copy of the form signed by the vice president of OCLC, then in a couple of days you will receive your API key. Email the API key to [ed.zanelli@prairiecat.org](mailto:ed.zanelli@prairiecat.org). He is compiling a list of the API keys to send to Innovative to set up the ILL module accounts before release 5.5 can be installed.
- e. North Chicago Migration** – The North Chicago Public Library is in far Northern Illinois near Lake Michigan. They are going live next Wednesday, October 26, 2022. They have about 51,000 items and

will be a fully participating library. Because of their location, they are surrounded by SWAN libraries and use a different delivery system. Their code for the main library is NCK and the code for their bookmobile is NCKBM. Their delivery codes do not end in a route number like our other PrairieCat libraries do (i.e.: BDBB-2). Just write NCK or NCKBM on the regular RAILS delivery slip and attached it to the item and put the item in with your other delivery items. If you normally use a separate delivery bin for libraries with a code ending in "B" (i.e.: BDBB-2), you can put items going to North Chicago with your other "B" items. **You do not need to check the items out to North Chicago!** Landis (PC) has a chart called Fulfilling Holds Cheat Sheet in Talent LMS in class seven of the circulation series that she will update and email next week.

- f. **Unique ID Discussion (Is This Still Needed?)** – The unique ID field in the patron record uses the patron's name and birthdate. For example, the unique ID for patron Mary Smith born on January 18 would be SMITM0118. If the patron refuses to give their birthday, use "\*\*\*\*\*" at the end of the unique ID. School libraries use this field for the student ID. Our procedures in the PrairieCat Circulation Policy & Procedure manual says that this field is required in the patron record. Landis (PC) would like the committee to consider changing the unique ID field to an optional field. Many libraries use the unique ID to search for duplicates. The public libraries have 323,687 patrons with a unique ID. About 16% of these unique IDs have an incorrect or no unique ID, which is over 50,000 patron records that need to be fixed. The committee decided to keep the unique ID as a required field. After the migration for North Chicago is completed, Landis (PC) will send out a report to the libraries with a list of the unique IDs that need to be corrected.

## VI. Friendly Reminders

- a. **Holds: When to Checkout, When Not to Checkout** – Slanicky (PC) sends out a weekly list (usually on Friday) of items that are in transit to ILL barcode or SHARE libraries when the items should have been checked out. An ILL barcode library is not a member of PrairieCat and they buy barcodes from PrairieCat to be able to place holds for their patrons. Checking in an item with a pickup point of an ILL barcode library causes a message to pop up on the screen that tells you to check the item out to the library. Union list libraries have their items in the database but do not have patron records for their own patrons. There is one patron barcode for the library. **Do not check out items to union list libraries.** They often put the name of the patron in the

hold notes field and if you check out the item, the patron's name is lost. Dale (RL) said that the wording used to be different when checking in an item with a hold on a paging list vs. a hold on an item that was returned by a patron and checked in. Slazyk (PE) confirmed that the wording is now the same for both situations. If you do not see "check out" in the display, do not check out the item.

- b. Holds: Do Not Use Missing Option for Other Library's Items** -If you have an item that is on hold but cannot be sent out (i.e.: the item is damaged), you need to check in the item a second time. Checking in the item the first time changes it from a bib-level or volume-level hold to an item-level hold. You need to check in the item a second time and transfer the hold back to a bib-level or volume-level hold. If cancelling a hold at check in, it is OK to change the status to MISSING if it is your item, but do not cancel the hold and change another library's item to a status of MISSING.

**VII. BYPT "Bring Your Problems Time"** – No problems were reported.

**VIII. Next Circulation Committee Meeting: February 28, 2023, 1:00 pm, via Zoom**



## Did You Know? – February 2023

### What is the Statistical Group Code?

The statistical group code is a unique numeric code assigned to each PrairieCat library that tracks circulation activity and statistics.

For example, when an item is checked out, checked in, or renewed, the stat group code # associated with the login that performed that transaction is written to the item record:

i94871620 Last Updated: 02-08-2023 Created: 11-12-2020 Revisions: 138			
Copy No.	1	Inventory Date	- -
Item Code 1	1024	Checkin Location	917
Item Code 2	- ---	No. of Renewals	0
Item Type	51 DVD, Long Loan	No. of Overdues	0
Price	\$29.99	Overdue Date	- -
Checkout Date	02-08-2023 02:53PM	Item Use 3	0
Checkout Location	41	Recall Date	- -
Due Date	03-01-2023	Total Checkouts	31
Patron No.	1235866	Total Renewals	2
Last Patron	1383539	Last Checkout Date	01-31-2023 10:06AM
Last Checkin	02-01-2023 06:05PM		
Local Dewey Call Number 099 DVD TV YEL			
Also linked to record(s):			

In this example, the item was checked in by stat group code 917, the Wilmington Public Library and checked out by stat group code 41, the Bourbonnais Public Library.

Note that if an item is renewed online by the patron, stat group code 997 will be written to the Checkout Location field and that will overwrite the original checkout location.

The stat group code is also used with the Fines Paid function:

Select a date range. If you wish to export the data to Excel, it is recommended that you work with shorter date ranges, i.e., no more than a month at a time. For Statistics Group, enter your library Stat Group Number.

For Owning Location, select All. Used in conjunction with the statistics group code, this allows you to see all fines handled at your library, regardless of the material's owning library.

You can also use the stat group code in Create Lists queries. For example, if you want to see the number of items owned by your library, checked out at a different library, and renewed more than 5 times, you can run a report to identify those items:

Classic						
Term	Operator	Type	Field	Condition	Value A	
1		Item	Item Agency	equal to	170	
2	AND	Item	Loanrule	not equal to	0	
3	AND	Item	Checkout Location	not equal to	1078	
4	AND	Item	No. of Renewals	greater than	5	

In this example, the items are owned by Woodstock (item agency = 170), they are checked out (loanrule not equal to 0), not checked out at Woodstock (checkout location not equal to 1078, Woodstock's stat group code) and have been renewed more than 5 times (no. of renewals > 5).

If you have questions about this information, please contact:

Melissa Landis [melissa.landis@prairiecat.org](mailto:melissa.landis@prairiecat.org)

The Circulation Committee has been asked to write a Collection Agency policy and submit the policy to Administrative Council for approval.

Currently, PrairieCat's only policy regarding collection agencies addresses how libraries are to be reimbursed for collection agency fees:

From PC Circulation Policy and Procedures Manual, page 28:

When patrons are sent to collection agency, all collection agency report charge fees must be paid to the library that sent them to collections. Libraries may collect payment for another library's item or any collection fees, but those payments must be sent to the appropriate owning library of the item or the library that sent the patron to collections. (Approved 8/22/07)

#### BACKGROUND:

PrairieCat libraries can choose to have their patrons submitted automatically to Unique Management or they can submit patrons manually. Note that in automatic submissions, patrons are submitted regardless of the materials' owning library.

If a library submits another library's patron to collections, should the submitting library be required to contact the patron's home library?

For manual submissions only: should there be a minimum amount due of the reporting library's materials before another library's patron is submitted?

For libraries that assess manual collection agency fees on other libraries' patrons: can those fees be waived by the patron's home library if they are 5 or more years old? Is the patron's home library required to contact the library that assessed the fee?

Other concerns?