PUG Day 2018 – Circulation Updates

1.) **New Paging List format (optional)** – Jeff Sullivan has designed a new print template that members can choose to use for formatting/printing their paging list. The new version includes additional information such as separate author information, publisher and date of publication, and item barcode. The type is small on the new list to still allow for six requests per page. However, you can change your print settings in Zimbra to print with a larger font size if you are not concerned with fewer requests per page (typically four with larger font). An example of the new paging list is included in this handout. If you are interested in switching your library to the new paging list format, please open a Help Desk ticket.

2.) **New Technical Bulletin #6 added this year -** *Understanding the Difference Between Public Library Reciprocal Borrowers and Non-Residents*. This bulletin provides information to clarify the difference between public library reciprocal borrower patrons and non-resident patrons for circulation staff adding public library patrons to the PrairieCat database. The easy way to tell if someone is a <u>non-PrairieCat reciprocal borrowing patron</u> (already a patron of a non-PrairieCat neighboring library) is that they should be able to present a valid, non-expired public library card from their home library at your circulation desk.

All staff should also be familiar with **Technical Bulletin #5**, ***Non-PrairieCat Reciprocal Borrowing Patron Registration***, that covers the specifics of how to enter a non-PrairieCat reciprocal borrowing correctly. There is also a shared patron record template in Sierra for non-PrairieCat reciprocal borrowing patrons, which can be linked to your login to walk staff through entering these patrons accurately. Non-PrairieCat reciprocal borrower patrons are not eligible to place holds in PrairieCat, and should go back to their home library to request materials from other PrairieCat libraries beyond walk-in reciprocal borrowing. Please note that all libraries should be sure they are using the most current version of Technical Bulletin #5, including the current Non-PrairieCat Reciprocal Borrowing Patron Registration form. When entering a new Non-PrairieCat Reciprocal Borrowing Patron, the form should be filled out and sent to John Slanicky at the Bolingbrook office via email scan (john.slanicky@railslibraries.info) or faxed to 815.886.5651.

3.) **New Technical Bulletin #34 added this year –** *Adding a PrairieCat On Order Item To Be Able to Place Holds.* This bulletin explains how a PrairieCat On Order Item can easily be attached to a bibliographic record to allow staff or patrons to place holds on new materials. PrairieCat has the "new" policy that allows member libraries to restrict their new materials for 15 weeks so they are only holdable by local patrons. If there is a new title in the database that your library does not own, and there are currently no orders attached or copies attached by other libraries that allow PrairieCat-wide holds, users will get a message that their request has been denied. A PrairieCat On Order Item can be quickly attached to the bibliographic record by any staff at your library authorized to add items. The hold will not be filled until there are available materials that are no longer new, but at least the hold is added to the hold queue.

4.) **Coming Soon – Auto-Renewals (optional) –** a recently added feature in Sierra is the ability to allow certain materials to automatically renew three days before the due

date. This setting is specific to an individual loan rule, so can be allowed for some items and/or patrons and not others. It is optional whether libraries want to use auto-renewal or not. What we understand is that when the Courtesy Notice is generated three days before the due date, if the item has not yet exceeded its maximum renewals / auto-renewals, then the software will complete the renewal. The patron will be notified on their Courtesy Notice email/text that this item has been renewed. Here are some other things to know about this new feature:

a. The renewal will not be allowed if normal blocks exist such as holds, the patron is blocked, etc.
b. The renewal will be based on the original due date, rather than when the auto-renewal occurs.
c. The Circulation Committee has approved that "new" materials will not be eligible for auto-renewal so that materials can return to browsing shelves when possible.
d. The Circulation Committee has approved that the auto-renewal maximum setting (if allowed) will match the renewal maximum setting in the loan rule. What this means is that if something currently has 0 renewals allowed, it will also have 0 auto-renewals. Or, 3 renewals allowed, it can have a maximum of 3 auto-renewals, rather than a confusing combination of 3 regular renewals and 2 auto-renewals for example.
e. Two other considerations are that we believe auto-renewal could increase circulation statistics (more circulations), but could reduce revenue from fines.

In the next few weeks we will begin testing auto-renewal with several libraries. Once we have completed thorough testing and have verified the details of how auto-renewal really works, we will be getting more detailed information out to the membership of how this feature works and how we will roll it out to any other interested library.

5.) Reciprocal Borrowing Statistics Change – an email was distributed recently explaining that a change has occurred in how reciprocal borrowing statistics are being counted. It is no longer possible to differentiate the **renewals** by reciprocal borrowing patrons from outside the library, and credit those to the library where the circulation originally took place. So, the remote renewals are no longer being included in the monthly/annual reciprocal borrowing statistics. The August statistics saw a small decrease due to this change. All renewals are still included in regular monthly circulation statistical reports.

6.) New Expiration Date Prompt – a new setting in Sierra logins allows for a prompt when displaying a patron record when a patron's card is expired, or is going to expire within the next 30 days. This allows staff to inform the patron when their card will expire shortly so it can be renewed before it expires. As part of a recent project to update circulation login passwords in Sierra, all circulation logins had this new setting activated. This is a login by login setting, so can be removed from a circulation login if not desired, or can be added to other logins. Please open a Help Desk ticket and specify the login if you would like this setting adjusted.

Have circulation-related questions? We're here to help, so open a Help Desk or reach out to members of the PrairieCat Library Services Team who assist with circulation issues:

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