

Resource Sharing Advisory Council
April 30, 2015

Present: Katie Caprio (RVLL), Rob Carle (UHLS), Dawn Geurds (EGRN), Matthew Graff (COHS), Sue Hoadley (WSTR), Debbie LaRose (COLN), Pegeen Lorusso (SNLK), Carol Melewski (RCSC), Jennifer Murtha (VOOR), Amy Peker (VOOR), Marion Pierson (EGRN), Lisa Pitkin (GUIL), Jennifer Sidoti (COLN), Catherine Stollar-Peters (BETH), Joe Thornton (UHLS), Ginny Wescott-Prew (TROY)

All discussions were about the migration.

The following list is a summary of the discussions of the ongoing issues that have come up since migrating:

- Review files -- do we have enough? Are they the right size? How do we manage them (e.g. prevent others from emptying them)? We seem to have enough at the moment, will buy more only when needed, and will add the word 'keep' to the title of any file we want left intact.
- Notices are still a problem -- Some patrons are receiving notices to pick up holds that aren't there when they go to the library. Some patrons are receiving 3:00 AM calls. Some patrons are getting no notices at all. We're working on it.
- Loan rules -- still being fine tuned. I asked Elaine if we had more than she's ever seen. "No, but close."
- Questions about migrated bills, and the message in item records, "Charges must be cleared manually." That message was put there by Julie Dore to handle the bills that were charged in Horizon and can't be cleared automatically in Sierra when an item is returned because Sierra doesn't know about it (i.e. it wasn't charged in Sierra).
- Email notices are sent from the item's location, not the patron's. Can this be changed?
- Horizon 'Claimed returned' items are showing up as 'Available' in Sierra. Must be changed to 'Claimed returned' in Sierra.
- Can we add Birth Date, Driver's License, or some other piece of information to distinguish patrons with the same names when we do a search? [We'll try.]
- We need a Create Lists workshop.
- Can't extend hold pickup dates.
- Paging lists seem to be a lot smaller since we migrated to Sierra.
- Same item appearing multiple times on paging lists.
- 'Volume' fields in item records still need to be cleaned up.
- Horizon 'Creation date' is not too useful since it's just a text field and not a real date, so comparisons like "< creation date" don't work well.
- Teleforms doesn't include the name of the library when it calls. Can this be changed?

Next meeting: TBA