

**Circulation Advisory Council**  
**July 6, 2016**

**Present:** Betty Albright (BETH), Rob Carle (UHLS), Dale LaGue (TROL), Debbie LaRose (COLN), Pegeen Lorusso (SNLK), Carol Melewski (RCSC), Jedda Ray-Gayle (APL), Joe Thornton (UHLS), Kathleen Tyrrell (VOOR), Ginny Wescott (TROY)

Jedda brought a list of questions from APL:

1. What does it mean to be an APL Card holder? What do the codes in the patron records really mean and how are they used?

Great question! We discussed the codes (Agency, Home Library, Patron type, etc.) and had a lot of answers, but it was clear that we need a document to explain how the patron record codes affect circulation, requests, statistics, etc. UHLS will work on it.

2. Patron card renewal alerts. APL asked to use *30 days* as the time before a patron's card is due to expire that a popup message in Sierra alerts the staff when the patron card is scanned at a circ desk. Some libraries requested a different number of days, which we applied to their staff accounts, and for all other library staff accounts (for all libraries, not just APL) we assigned *30 days* to this function.

3. Items "falling off" the hold shelf. This has been an issue since our Go-Live date in 2015. Ginny had the best advice:

Don't clear the shelf until you view the expired holds report and check the shelf. If an item isn't there, modify the hold, **then** clear the hold shelf.

4. Patron self-registration. APL asked for more information about how this will work. Joe gave a brief overview but we'll discuss it more after III enables the function for us.
5. Items remaining in *Overdue* status for over a year and never billed. Why? We think these are items that were checked out in Horizon and never returned. Joe will write a report to find all items that were checked out in Horizon and are still *Available* in Sierra. Rob will do.
6. APL *Out-of System* fee still shows as \$25 when APL requested it be set to \$50. Rob is working with Laurie Louis at APL on this.
7. APL is ready for a one-time deletion of all APL items with *i-Missing Inventory* status.

And so ends the great APL agenda list of July 2016. Thank you, Jedda.

## Other agenda:

1. **Offline Circulation:** Because Sierra was down all day on July 1 and almost all libraries used the Offline Circulation program, Joe asked how it worked. Some comments:
  - It was a little tricky to get staff to switch patrons
  - *Due dates* are a problem due to our many item types and loan rules (there's one default due date for everything in Offline Circulation.
  - PC Reliance was better.
  - Some barcodes with 13 digits caused problems.
  - Stat group code had to be adjusted by UHLS for some files before processing. Joe reminded everyone about configuring *Stat group code* in the Offline Circulation program.
  - Some files didn't upload (e.g. some COLN files) and we're not sure why. Probably a network issue at the libraries where this happened.
  
2. **TROY MyCard:** TROY is considering issuing a *MyCard* like APL and asked about the experiences of other libraries with APL's *MyCard*. Some comments:
  - Some Parsons kids request that games be sent to APL.
  - Jedda explained how APL's *MyCard* works.
  - No *MyCard* issued if the patron has *lost* items.
  - Carol: "*MyCard* is a great success at RCSC."
  
3. **Patron self-registration / Paper registration cards:** The Directors Association asked us to revise the paper patron registration cards, but made it a lower priority in the light of the imminent enabling of patron online self-registration in Sierra. So our discussion focused on how self-registration will work and whether it will make the cards unnecessary. Although most agreed that online registration will be helpful, there was unanimous agreement that the cards are still necessary. We recommend the following changes to the printed cards:
  - The *County* box on the front side can be removed.
  - On the back side, *Secondary Phone* should be replaced with *Hold Pick Authorization (First, Last Name)*.
  - On the back side, *County Cde*, *Alternative ID*, and *Registering Library ID* can All be removed.
  - On the back side, *Staff Initials* should be renamed to *Staff*.