

Circulation Advisory Council
October 3, 2018

Present: Philip Berardi (GUIL), Rob Carle (UHLS), Sue Hoadley (WSTR),
Debbie LaRose (COLN), Carol Melewski (RCSC), Jen Murtha (VOOR),
Marion Pierson (EGRN), Robert Sheedy (APL), Catherine Stollar Peters (BETH),
Joe Thornton (UHLS), Virginia Wescott (TROY)

Out-of-system patrons:

from the September meeting:

We could manage loans (or denials) to Out-Of-System patrons with Sierra Loan Rules instead of (or maybe in addition to) the red lines, staff training, etc. that we use now. We discussed the possible ramifications of doing this, and there were some concerns about requests, e.g.: if we created a Loan Rule that prevented GRAF Out-of-system patrons from using other libraries, they would not be able to request items from other libraries even if they planned to check them out at GRAF.

At today's meeting we decided to leave things as they are.

Max items out: We discussed our ability to change the limits on the maximum number of DVDs or other Item Types patrons could take out simultaneously. This would be done by Patron Type and so could cause confusion for patrons, so we decided to leave the current setup as is.

Notice problems? (just checking): To address the problem of patrons not receiving expected email courtesy notices, we added SPF (Sender Policy Framework) entries to all libraries' DNS settings. Joe asked if things are better since the change (i.e. fewer complaints). Answer: Yes, things are better.

Duplicate Patron Records: Rob raised the issue of patrons who have multiple records in Sierra, and reminded everyone to check for existing records when adding a new patron.

Discussion:

- Each library will manage their own Patron Records.
- It's not always obvious or simple to know which record is the "good" one (address, e.g.), and it's a judgment call for the libraries.
- This is a relatively low-priority problem.

eCommerce:

- We went live (and then dead, temporarily) on 10/1 while we addressed some bugs and the need for P.R. material.
- The *Pay Online* option doesn't appear in *Encore* if the patron's total fines are less than the minimum allowed online payment (\$1.01). This is good.
- We should add a blurb in the *eCommerce* screens informing patrons that the minimum amount they can pay is \$1.01.

Billed in Horizon: There are about 2,000 records in Sierra that were "billed in Horizon." A message in the item records reads, "Item billed in Horizon. Patron charges must be cleared manually. Give item to supervisor to clear charges before reshelving." When a patron pays one of these bills, staff marks the item 'Lost' and removes the message from the item record. If a patron pays one of these bills online, staff need to be informed so they can update the patron and item records. UHLS will write a report to alert staff about the needed changes.

Online registration problem: We've started seeing holds placed by patrons with no identifying information in their Sierra patron records (no name, address, etc.). Apparently people who register online are able to create a patron record without any fields filled in, despite the fields all being required on the input form. UHLS will investigate.

Next meeting: Wednesday 11/7/2018 at 9:00 at UHLS.