

Circulation Advisory Council
12/6/2023 (online)
Minutes

Present: Rob Carle (UHLS), Pam Jacobson (SNLK), Eva Romero (BETH), Joe Thornton (UHLS), Lauren Vincent (GUIL)

Zoom summary for Circulation Advisory Council (12/06/2023):

Quick recap

The group discussed several issues related to the database and the process of managing holds and bibliographic records. They also addressed the problem of frequent *Sierra* crashes, with Rob suggesting filing a support ticket when it happens. The issue of changing Due Dates was also discussed, with Joe confirming the change to January 3rd for items with Due Dates of 1/1 or 1/2. The meeting concluded with Joe explaining the process of canceling holds and wishing everyone a happy holiday.

Summary

Database Holds and Cancellations Discussion

The group discussed an issue with the database, especially the difficulty of deleting bib records if they have holds on them. Rob mentioned that the number of records might seem daunting, but many of them have holds but no items attached. Joe shared a report of bib records with holds and no items, which they suggested could be cleaned up. The group also discussed the process of canceling holds, with Joe explaining that there are options to notify the patron. They suggested the possibility of adding more options to these messages in the future.

Holds, Notifications, and Bib Record Complications

Eva expressed concerns about the process of managing holds and the issue of automatically canceling holds without notifying patrons. Joe clarified that notifications are sent when a hold is canceled. The group also discussed the problem of 'orphan bib records', with Joe explaining that the decision to cancel holds lies with the individual libraries. Rob cautioned about the potential complications of deleting bibliographic records, particularly if they are attached to an order record. Lauren sought clarification on this issue, with Rob explaining that while bib records can be deleted if no items are attached, if there's an order record, it cannot be removed.

Bib Record and Order Record Discussion

Lauren, Rob, Joe, and Eva discussed the nature of bib records and order records. Joe provided an example of a bib record from a report they ran for COLN, and they concluded that many of these records are likely order records. Rob guided the group on how to view the summary of these records and noted that if the Created Date of the bibliographic record is old, it might indicate that orders won't ever come in. This issue was identified as needing attention from the technical service department. Eva then sought feedback on whether this discussion answered a question from Sylvia.

Sierra Crashes and Computer Freezes

Rob raised concerns about frequent crashes of *Sierra* during use, particularly when users are away for a short time. He asked if others were experiencing similar issues. Pam and Lauren said that they used to encounter these problems but the frequency has decreased. Pam mentioned that the SNLK computers freeze up and suggested the issue could be related to their local network. Rob suggested filing a support ticket to investigate the issue further and Pam agreed to keep a log of the problem. The group also discussed the potential involvement of Sean Minotti from SNLK, who might have access to their local network.

Due Date Changes and Library Operations

Lauren asked Joe about the change in Due Dates, which Joe confirmed had been moved to January 3rd. Rob added that they had initially changed Due Dates to January 2nd but had stopped after realizing that some libraries were open. Pam mentioned that SNLK was open on January 2nd and it didn't cause any issues. Lauren then raised the issue of blocking Due Dates for holidays, with Joe and Rob clarifying that Rawdon was handling the update to the Days Closed table. They acknowledged that the update should have been done earlier, which is why there were so many January 1st Due Dates.

Canceled Holds Process Explanation

Joe explained the process and options for canceling holds, highlighting that the text of the messages sent to patrons can be changed and more notices can be added. They mentioned that the text can be specific to each library. Lauren understood the process and confirmed it was for canceled holds, not just expired ones. Rob clarified that these records do not have item records attached and have old Created Dates, so there is no reason to believe that an item record will ever be attached. He also mentioned that some of them have order records attached. The discussion concluded with Joe confirming there was nothing else to discuss and wishing everyone a happy holiday.

Next steps

- Joe will share the report link with the group to delete holds on bib records.