

Meeting summary for Circulation Advisory Council (04/02/2025)

[Zoom summary edited by Joe]

Quick recap

The team discussed various issues related to the *Sierra* support system, including a software problem causing disappearing fines and the challenges of managing payments through *PayPal* and *Sierra*. They also discussed the importance of identifying items physically, the process of uploading circulation and patron data, and the need for more training sessions on the *Offline Circulation* system. Lastly, they addressed the issue of disappearing fines and their impact on patrons' ability to check out items, and welcomed a new team member, Kayleigh Hartnett, the new Head of Circulation at TROY.

Next steps

- Rob to send a link to the Offline Circulation documentation on the UHLS [Training Website](#) to the Circ list.
- UHLS staff to process the offline circulation files from Bethlehem that were accidentally sent during training.
- Rob to look into making the UHLS training website easier to find on the main UHLS website.
- Rob to be available for offline circulation training for libraries that request it.
- Libraries to alert UHLS when sending offline circulation files for processing.
- Rob to investigate if there's a way to identify remaining items from the discontinued Rotating Collection in Sierra.
- Libraries to physically mark items as "withdrawn" when removing them from the collection to prevent confusion if they resurface.
- Rob to create and distribute instructions for the workaround of manually adding and waiving fines to resolve the disappearing fines issue.

Summary

Sierra Support Contact and Software Issue

In the meeting, Joe discussed the UHLS contact information for IT support, which now operates 24/7. Rob explained a software problem causing disappearing fines, which *Innovative* has not yet resolved. Emily suggested a workaround for the issue. The team agreed to report any further occurrences of the problem.

PayPal and Sierra Payment Challenges

Joe discussed the challenges of managing payments through *PayPal* and *Sierra*. Joe explained that when a patron tries to pay for an item, *PayPal* may collect the payment multiple times due to errors, and *Sierra* may not always reflect the payment. Joe

demonstrated how to identify and resolve these issues by refunding duplicate payments and requesting additional funds from Jona for the libraries. Joe also mentioned the difficulty of identifying payments that were rejected due to mismatched names between *PayPal* and *Sierra*. Sylvia suggested that looking at the address associated with the credit card might help identify payments for children.

Patrons Charged Multiple Times Issue

Joe expressed frustration with the ongoing issue of patrons being charged multiple times for transactions, which is taking up a significant amount of time for troubleshooting. Joe plans to escalate the issue to a higher authority at III if the problem persists. Sylvia suggested that her part-time staff could forward receipts to UHLS to provide additional evidence of the problem. Joe agreed to this approach and emphasized the need to collect evidence to prove the issue to III.

Audiobook Barcode and Silver Tag

Sylvia received a call from POES about an audiobook with no barcode but a silver tag for the Upper Hudson rotating collection. Rob clarified that the silver tags could carry barcodes and should be added to the item record. Sylvia sent the audiobook to Rob for further handling, and they all remembered the existence of the Rotating Collections.

Identifying Withdrawn Items for Efficient Returns

Rob discussed the importance of identifying items physically, especially when withdrawing them, to prevent issues with returning items. He also mentioned that he now keeps the barcode of withdrawn items to aid in identification. Sylvia inquired about the process when *Sierra* is down past closing time, and Rob clarified that the Offline Circ function is used to process uploads, which are then stored as individual files. He assured that these files can be processed once *Sierra* is back up.

Daily File Processing and Data Upload

For the Offline Circ program, Rob emphasized the importance of not checking items in and clearing the file on a daily basis to avoid appending old data. He also mentioned that UHLS would be cautious about processing files and would not process old ones. Sylvia clarified the process of uploading circulation and patron data, including the pop-up that appears after the upload and the need to clear the circulation file. Rob reassured the team that they had considered all possibilities and had never run into a problem.

Offline Circulation Training and Practice

In the meeting, Rob and Sylvia discussed the Offline Circulation system and its usage. They agreed that Offline Circulation has been working well, but there's a need for more training sessions, especially for large libraries. Rob offered to provide training directly

to libraries and suggested arranging a fire drill in *Sierra* where *Sierra* is down for a morning to practice using *Millennium*. Laurie expressed interest in getting her staff some direct training on the system. Rob also mentioned that Phil Berardi had written some great instructions on what to do during Offline Circulation, which are available on the [Training Website](#). Sylvia shared her plan to train her part-time staff on Offline Circulation, using fake registration cards for practice.

Sierra System Alert and Offline Processing

Sylvia and Rob discussed the importance of alerting UHLS when certain processes are being carried out, particularly in relation to the *Sierra* system. They emphasized the need to avoid checking items in when *Sierra* is down, as this can distort the holds picture. Rob also mentioned that *Sierra* doesn't go down often, but when it does, it's a priority. Sylvia shared a recent experience where her staff accidentally checked in items during a training session, which was caught due to the error files. Rob suggested that items should be checked in only when *Sierra* is up. The team also discussed the offline file processing function and the importance of not accidentally sending files during training sessions.

Disappearing Fines and Patron Checkout

The team discussed the issue of disappearing fines and their impact on patrons' ability to check out items. They clarified that these fines still count against the patrons' money owed. The team also discussed a workaround where if a fine is too large, it can be manually added and then waived, allowing the patron to check out items. The team also welcomed Kayleigh Hartnett, the new Head of Circulation at TROY, and encouraged her to ask questions and seek help as needed.