

## **Meeting summary for Circulation Advisory Council (06/04/2025)**

**[Zoom summary edited by Joe]**

**In attendance:** Rob Carle (UHLS), Joe Thornton (UHLS), Emily Willerth (APL), Kayleigh Hartnett (TROY), Kirsten Heller (RCSC), Jessica Lynn (APL), Laura Seidel(?) (BETH)

### **Quick recap**

The meeting began with resolving technical difficulties and introducing the new executive director. The team then discussed various library system issues, including a book mystery, online payments and refunds, and duplicate PayPal transactions. Finally, they addressed upcoming changes to the library system, including the transition to Vega Discover and a new mobile app, as well as potential solutions for managing duplicate patron records.

### **Next steps**

- Rob to create a ticket and ask Innovative about the issue of an item being checked in without a check-in location.
- Joe to investigate the new refund process with the change from PayPal to NBT Bank as the merchant account.
- Upper Hudson Library System team to prepare for the transition from Encore to Vega Discover, including creating publicity materials and training resources for libraries and patrons.
- Upper Hudson Library System team to prepare for the implementation of Vega Mobile app.
- Joe to look into the APID (APATID) feature in Sierra for potential implementation to help reduce duplicate patron records.
- Kirsten to follow up on the refund process for online payments once Joe has investigated the new procedure.

### **Summary**

#### **Book Mystery and Library Systems**

Joe opens the meeting and introduces Chris Sagaas, the new Executive Director, who briefly shares his background in library work. Kirsten then presents a book mystery she encountered while running the e-commerce list. She describes a book that was marked as Lost and Paid for by a patron, but was found to be available on the shelf, with inconsistent check-in information in Sierra. The group begins to discuss this unusual situation to help Kirsten resolve the issue.

## **Library Payment and Refund Procedures**

Kirsten and Joe discussed the process of handling online payments and refunds for library items. They clarified that if a patron pays for an item online, it does not automatically check the item in, but the payment affects their account. Kayleigh explained that if a billed item is returned in good condition, the fine can be waived manually. Joe and Kayleigh described the options for refunding online payments, including giving cash or using PayPal. They also touched on the confusion surrounding a specific item with no check-in location.

## **Mysterious Library Item Investigation**

The team discussed a mysterious library item that was checked out but had no check-in location, despite being marked as available with a last check-in time of May 9, 7:07 AM. Kayleigh confirmed the item was checked out and had a checkout location, but the check-in location was missing, leading to confusion about how it could have been checked in without a location being recorded. Joe and the team agreed to investigate further, with Kirsten planning to share the item number for deeper analysis, and Joe mentioned they would consult III about the possibility of this occurring.

## **PayPal Transaction Synchronization Issues**

Joe explained that they had been experiencing issues with duplicate PayPal transactions for years, which he identified by seeing multiple identical transactions within a minute. After years of troubleshooting, a PayPal representative named Dave explained that the problem occurred because PayPal was serving both as the payment collector and the merchant account bank, leading to synchronization issues between PayPal and their Sierra system. To resolve this, Joe removed the "Pay with PayPal" option on the e-commerce payment screen, leaving only credit card payment as an option, which significantly reduced the number of duplicate transactions. Additionally, they switched their merchant account from PayPal to NBT Bank, which handles the money collection and quarterly library reimbursements, though Joe noted that tracking and issuing refunds through the new system may be more challenging.

## **Library System Transition to Vega**

Joe announced that the library system is transitioning from Encore to Vega Discover, a significant change that will require work for both the library staff and patrons. Kayleigh shared her experience with the Mid-Hudson library's recent switch to Vega, noting that while there were some initial challenges with navigation and user experience, patrons have generally adapted well to the new system. Joe expressed gratitude for Laurie

Shedrick's assistance in sharing Mid-Hudson's resources, including their knowledge base and publicity materials, to help other libraries prepare for the transition.

### **Vega Library System Implementation Update**

Joe announced two major changes: a new library system called Vega that will be implemented in 6-8 weeks, and a new mobile app called Vega Mobile. Kayleigh inquired about the implementation timeline, and Joe explained that while they don't have a specific date yet, it's expected to be rolled out by the end of summer. Joe mentioned that while some staff initially had difficulty with the system, patrons have become more accustomed to it over time. Rob is working on addressing a technical issue regarding check-in locations and will update the team once he receives a response from Innovative.

### **Library Duplicate Record Prevention System**

The group discussed a potential solution for duplicate patron records in their library system. Kayleigh explained the use of APATIDs, a unique identifier system used at Mid-Hudson to prevent duplicate records by combining the last 4 letters of the last name, first initial, and birthday. The system automatically checks for existing records during creation and allows staff to override or view existing records if duplicates are found. Joe expressed interest in implementing a similar system for online registrations, and the group agreed to investigate the possibility of adding APATIDs to their Sierra system.