

**Circulation User Forum**  
**October 15, 2015**

**Present:** Tim Burke (UHLS), Susan Canfield (NASS), Nolan Doroski (APLM), Laurie Louis (APLM), Daryl McCarthy (NGRN), Carol Melewski (RCSC), Evelyn Neale (COLN), Edra Nehme (BETH), Roseann Parzek (NASS), Nicole Persaud (COLN), Judy Petrosillo (BERN), Marion Pierson (EGRN), Anne Pitlyk (APLB), Michele Reilly (VOOR), Jennifer Sidoti (COLN), Catherine Stollar-Peters (BETH), B-J Tefft (NASS), Joe Thornton (UHLS)

Tim opened the discussion with a description of the purpose of this and the two upcoming forums: they're intended as open forums for the users in our system -- expert or not -- to discuss what's working and what isn't in Sierra, and to share workflows, workarounds, techniques, solutions, etc. that they've discovered or created.

Some rough notes based on the discussion:

- Nassau asked about using two Sierra Desktop Application (SDA) sessions on one workstation so they can switch between checkin and checkout screens without losing the contents of the first screen. This led to a discussion about Sierra user licenses. Joe said that we purchased many more than we thought we would need and was surprised that Laurie reported that APL has hit the limit at times. Catherine and others said that their libraries use multiple SDA sessions all the time and haven't been denied access yet. Joe asked that everyone do what works best for them (number of sessions) and let UHLS know if you hit the license limit.
- Nassau asked about the "Do you want to print a receipt" popup that appears with every transaction, and asked if we could remove it since they don't print receipts. Judy said that Rob Carle helped BERN set up a dummy printer, which made this prompt less intrusive. We suggested that any library with a similar issue contact UHLS for help.
- A "like" (i.e. what's working well): Judy said that she likes that you can see all of a patron's information (personal data, loans, holds, fines, etc.) in one place.
- Linked accounts: Nassau said that there's sometimes confusion when, say, a husband picks up his wife's held item and the hold stays on the wife's record. A long discussion followed that included opinions (e.g. "that's the way it should work," and "it's a privacy issue") and suggestions ("ask the person picking up the hold to be as specific as possible," or "cancel original hold").
- Another "like": Edra likes that you can put very specific notes on fines, such as, "We waived the replacement cost because we did it manually."
- And another: Michele likes that you can see most of a patron's information by just hovering your mouse over the 'i' button on the patron's record.

- Damaged items: A long discussion about handling damaged items at checkin:
  - Catherine: We (BETH) check it in, don't fill the request, and mark it as damaged.
  - Nolan: We (APL) change it to "Lost" (click "Mark as Lost") if we think the patron will have to replace the item. Otherwise we check it in "damaged."
  - Marion demonstrated how they (EGRN) handle them.
  
- Paging Lists. Quote of the day (paraphrased, anyway): "It's an abomination how many steps we need to go through to generate the Paging Lists."
  
- Last borrower: We discussed different methods to display an item's last borrower. Edra demonstrated a way to use the Edit->Patron View Actions->View last patron to checkout item function when looking at an item record, and Judy said she double-clicks in the "Last Patron" box in the item record.
  
- Expired holds: Long discussion, including:
  - "I don't clear the list" [I think in order to preserve the holds?]
  - Canceled holds don't show up on the expired holds lists.
  - "We see 'in transit' items on our holds shelf, which means staff ran the 'expired holds' report but didn't take the items off the shelf."
  
- Create Lists: We had a long discussion about how to use Create Lists, often in combination with Rapid Update (to, for instance, make "new" items part of the regular collection). It was clear from the discussion that we need another Create Lists Workshop.
  
- Advisory Councils: Nassau asked how they could be kept informed of recommendations, problems, tips, etc. Joe will add all forum attendees to the Circulation Google Group and remind everyone in the system that those advisory council meetings are open to everyone. Also, the minutes of those meetings (when, ahem, posted) contain decisions, recommendations, etc. Also, Joe will revive the Automation Services blog and give everyone the link to the UHLS Training website, which contains screencasts, training documents, and other tools.