

## **System Managers Meeting March 9, 2004**

- I. **Patron Purge** – A memo will be sent out tomorrow to do the annual patron purge. The Director's signature will be required. Criteria include: Card created before March 1, 2001, Card last used before March 1, 2001, Card expired before March 1, 2004. Patrons that are blocked or barred will not be removed.
- II. **Electronic Ordering in Acquisitions** – Kristen worked with ROG to begin electronic ordering with Baker & Taylor. It is working well. This is like X12 ordering in Dynix. Please let Kristen know if you would like to be trained on how to do this. 949 ordering will be started after this.
- III. **Assumed Lost Report** – Please send email to slcstaff if you want to have this setup for your library. You need to fill out a form indicating how many days after an item is overdue that you want it changed to LOST-ASSUM. Reports are run twice a month (7th and 14th or 15th and 30th) If you don't want the report run for your library twice a month, please let slcstaff know. Libraries commented that this seems to be working really well. The problem with Claims Returned items being converted to lost has been fixed. If your library has never used the LONGOVERDUE report, then you should expect a lot of notices when the report is first run since it is going back all the way to the beginning of the system.
- IV. **Correct Holds Report** – This report is run twice a day to fix the "available holds" alert in patron records. The "available holds" alert happens when items that are added from an acquisitions order are on hold. The staff then checks the items out to a "processing" user. In the meantime, the patron record has the alert for "available holds" even though the hold is not available for them. This report is now run during the middle of the day to help alleviate this problem. Should be fixed in a later release.
- V. **Notes/Comments Alert** – Tammy will look into finding out if the wording can be changed for Notes to make it stand out more. Some libraries said they never received the email asking for their opinions on this matter. The group decided that we would leave the notes and comments to continue making the "Notes" alert pop up on patron records since we have previously not been consistent with how the notes/comments were being used. From this point forward, libraries should use Notes for information they want to pop up in a patron record and Comments for items that they do not want to pop up in the patron record. We will look at this next year to decide if the "comments" can be hidden like the "notify via" field is now. We will also test to see if the field names can be changed instead of cutting and pasting the information in these fields when you want to move info from one field to another.
- VI. **Round Robin SIRSI Problem Discussion**  
**ARM** – wanted to know if a new ibistro flyer was going to be distributed (No. If libraries do not like the screen shot that is shown in the attachment that was sent, please let Tammy know and she can create one that is just for your library.) Also giving out a lot of Michicards. If the patron has a card with a sticker, don't

know if they are in good standing or not. Library should still give Michicard to patron, or could call the home library to make sure.

**SHL** – questions about punctuation and spacing in patron records, particularly with names. This makes it very difficult to search for patrons when giving out cards and some patrons are ending up with multiple cards in the system. Staff should use what it on the driver's license when entering info into the system, not just what's on the application. (Example: DL says William Smith, application says Bill Smith.) The Alt ID field containing the DL# has also really helped when trying to search for a patron. Alternate search methods for patrons will be available in the next release. We need quality control of names. Kristen's documentation for her class does use apostrophes and dashes. SLC will come up with a list of standards and have system managers look at them for the next meeting.

**CMM** – Debbie introduced herself as the new head of circulation at CMM. Julianne discussed a new card that they are issued called "VISITOR" that people who don't qualify for a card can use to print and use the internet. This card costs \$2 and does not allow circulation of materials. It has a wood grain look and says VISITOR on the card. They will be offering wireless access at CMM only.

**MCL** – remind staff that anyone can check out materials at MCL. They serve anyone in the state, this includes your Michicard and Courtesy card holders from other libraries.

**FRA** - Eric's last meeting. He has taken a new job in NJ. Enjoyed working at FRA and with all the SLC libraries.

**CHE** – Holly was promoted to the FT Children's Librarian. A patron took a network cable from one of the pcs and plugged it into his own computer. Was told he couldn't do this. Want examples from libraries that lists this in their policies that patrons can not do this.

**SCS** – Will be starting wireless next week. Found a problem when using a patron record, then using another record to place a hold. The "Current" button shows the first patron id but the second patron name. Seems to happen only with holds. When printing intransit list, it is cut off and doesn't wrap text any longer. Will try reinstalling workflows.

**SHL** – What is release schedule? 2003.1 is due out at the end of April, as is the client (workflows) for 2004. Release 2004 is not due out until the fall.

Would like a last title alert when the last copy of a title is removed from the system (this was available with CLSI). Will ask Sirsi. Would also like a hold alert/purchase alert report for when there are many holds on a title. Tammy will let Ellen know what report this is. TPL uses this now.

**RSV** - # of pieces for AV items shows when checking in or out but doesn't display to verify when item is in transit. Ask Sirsi if this is possible. Missing Multiple Piece Items slip will be sent out soon. ROG created one and we will use this for the entire Coop.

ROG – timeout in ibistro is too fast. How do we increase this?

WPL – Patron would like saved bibliography to save on system. We can not do this. WEG and WMB will close on April 2nd. July 4th is the groundbreaking for the new civic center library. WWW will move to the new location, which is scheduled to be completed by Jan 2006. WEG and WMB items will be shadowed and no holds will be allowed.

**VII. Next Meeting**

The next meeting is April 13th at 9:30am at MCL.