

## **System Managers' Meeting May 11, 2004**

**Top Five Issues** - Tammy met with our customer account manager at the Sirsi conference.

1. Bill notices should include total amount owed by the patron. This is coming in Unicorn 2003.1.
2. Patrons should be notified if they have a hold on a last copy that becomes unavailable. This is not planned. Tammy will get a quote on fixing it.
3. Holds should not become immediately available when orders are loaded. This will be fixed in 2005.
4. Phantom hold problems. Sirsi needs more examples to be able to address this.
5. Too easy to modify or delete another library's cataloging records. This will be fixed in Unicorn 2004.

**Plans for Upgrading** - Tammy should get a quote this week for the new production server, which she can take to the May board meeting. If that goes smoothly, the new server would be installed in June. There should be no downtime. In July, we would test Unicorn 2003.1 and WorkFlows 2004. In Aug., we would upgrade the server to Unicorn 2003.1. WorkFlows 2004 training and the start of the switch to WF 2004 would start in September and be completed by December.

Some training will be needed for WorkFlows 2004. Some of the icons have changed and there are a lot of additional features.

**Unicorn 2003.1 and WorkFlows 2004 Power Point Presentations** - Tammy passed out copies of these presentations from the Sirsi conference. New features include more partial payments for bills, bill totals, pull holds will be more random selected, more receipt customization and column sorting. WorkFlows 2004 has enhanced patron searching. "Browse searching" will no longer work, and Boolean operators will be needed. It is much more flexible.

**Pre-due E-mail Notices** - Over half of the libraries are using these. Do the libraries who are not using it wish to start using it? Kristen will e-mail the system managers of libraries who are not currently using pre-due e-mail notices.

**User Profile Expirations** - To renew items on an expired card, you can renew the user, renew the items then expire the patron ID. If a patron renews items in iBistro, the due date is the normal loan period or the date the patron card expires, whichever comes first.

**Outreach Profiles** - Some of the libraries who use the outreach profile use 21 day loan periods. Kristen would like to add lines in the circ map for the outreach profiles to allow the outreach patrons from libraries that use a 21 day loan period to receive materials from other libraries.

Most of the affected libraries limit their outreach patrons to locally held materials because they have no fines on that profile, and returns can be slow. SHL doesn't have those issues so Kristen will create lines for SHLs outreach patrons.

**User Cat 3** - User cat 3 is back because TPL needs it. If you want to use it, SLC staff can

create the necessary categories.

**Round Robin** - SHL would like to know if anyone is using electronic ordering successfully. Kristen would be glad to try again with SHL.

SHL asked if anyone had PACs dedicated to OPAC usage. Several libraries do this. General internet access can be blocked from these, either in Internet Explorer, by using a hosts file or with other tools. Instructions for doing this will be created and put on the instructions web page.

SHL has had problems with patrons unplugging the cat 5 cable from their computers and plugging it into their laptops. CHE strongly recommends having a written policy against this. SHL has also seen patrons plugging in their own speakers.

SHL is concerned about SLC's World Cat holdings being very out of date. Kim Shearer removes World Cat records when deleted records are brought to her attention. There has never been a mechanism to synchronize SLC holdings with World Cat's SLC holdings.

Kristen has been working on some reports for interfacing with OCLC that may eventually be able to do mass deletions.

WAM had a daily count report that showed they had over 400 charges on a day they were closed. They will send the information to SLC staff.

CHE has found that the 30 days before deletion of items charged to the discard user is not quite enough to get through their discard process. It was suggested that they use a repair or problem user before finally charging the item out to the discard user.

**Next Meeting** - The next meeting will be June 8, 2004, at 9:30 am at MCL.

<b>Attendees -</b>	Powell	LWM
	Pierce	SHL
	Smith	ARM
	Couck	LEN
	Taskin	ROG
	Burgeson	SBL
	Prykuck	CMPL
	Casamer	MCL
	McIntyre	RSV
	Gillis	HPW
	Sterling	EPL
	Orlando	SCS
	Radachy	SCS
	Goike	MPL
	Kirsten	CHE
	Horn	TPL
	Brodak	TPL
	Larsen	MTC
	Lasky	SHL
	Russ	CLL

Urban	WPL
Minor	CHE
Turgeon	SLC
Valyi-Hax	SLC
Potter	SLC