

## **System Managers' Meeting**

### **Nov. 18, 2003**

**Brief records for serials reminder** – Please remind staff that if they get a magazine, and cannot find a record, do not create a brief record. An overlay cannot be done, and serial control numbers won't go over in a merge.

If staff has a serial without a record, they can either call Elizabeth Ehrlich or e-mail slcstaff with the title and the ISSN.

**Calendars** – Please get your 2004 closed days to Vicki.

**e-mail notices bouncing** – Chris asks that staff deal with bounced e-mails daily. If this isn't done, more notices bounce. When editing the patron record, please use the blue asterisks to remove the e-mail address. Backspacing over the address will not remove it.

Please also train staff so they know what a real e-mail address should look like and to type them in all lower case. The latter is a change. We are seeing a lot of staff entry errors.

**MiLE User Day** – MiLE User Day will be Wednesday, Dec. 3, 2003. Please sign up.

**MiLE Reminders** – We are still seeing a lot of items getting sent to MCL. Please make sure your staff **knows** how to handle MiLE holds when they do the Pull Holds report. Kristen is available to do local training, if you feel your staff need a refresher.

**SLC library visits** – Tammy and Kristen will be going to each library during January and February. They will spend 2 hours listening to staff questions, complaints, suggestions for improvements, etc. The schedule will go out soon.

**Blanket holds** – The blanket holds wizard was left out of the toolbars. Kristen has added it to the circ and alltools toolbars, in the holds group.

The blanket holds wizard allows you to either place multiple copies of a title on hold or to place one hold that can be filled by any one of multiple titles. A copy level hold allows holds on multiple copies of one title. A title level hold allows a hold across multiple titles.

If you wish to test this out, all patrons with a last name of McTesty are test cards. There is a handout, which will also go up on the SLC instructions web page soon, and the helps are good.

**New lost report** – We have not yet started to run the new lost reports. SLC staff will be setting these up, but needs some information from each library. Kristen passed out a list of these questions. Please get the answers to SLC staff by a week after the next System Managers' Meeting.

There are more options with the new lost reports than we had before. Different item types can be set to go lost at different days overdue. Notices can be generated.

We are not sure if lost is shadowed in iBistro. If you see a status of LOST-ASSUM, the item

was made lost by a report. If the status is LOST-CLAIM, the item was made lost manually.

Libraries that use debt collect don't have to agree on how long it takes for an item to go to lost. The number of days after the bill is created is what sends the item to the collection agency, and that number is agreed upon by participating libraries. When that bill is created is decided by each library.

**Five biggest challenges** – As required by the annual plan, we would like the System Managers to come up with their five biggest issues with the system that need to be fixed. Kristen passed out a list made by Cindy Taskin (ROG) to start off discussion.

A few of these issues will be solved within the next few days. Kristen will add the edit global wizard to the alltools toolbar. Lissa will change the place hold text to an icon in iBistro. The font size issue will be fixed in Unicorn 2004.

The load order issue with comments was possibly solved by a patch. There are mixed reports on whether it was really solved. Kristen will check.

MCL would like to know when CMPL will stop showing as a hold pickup location in Workflows. This requires paying SIRSI to do some custom programming. This process has been started. In the meantime, please remind staff not to choose CMS, CMN or CMM as a hold pickup location. They do not have Workflows any longer, and cannot accept items in transit.

SCS is not happy that hold alerts aren't removed until the overnight reports. Everyone agreed that alerts hanging on to patron records until the next day is quite annoying. Kristen has opened a help desk call on this.

CHE would like copies on order to show up in the volume copies tab. Currently, it is necessary to click on the orders tab to see if the library has the item on order. EPL pointed out that you can click on the book gadget to get a list of copies that includes copies on order at the bottom of the list.

Items are ending up on the pull holds report that are not actually at that library. This is probably due to the holds that have to be switched from WAM to another library.

EPL has noticed some holds that are library range, not group holds. These are often ending up on not-owned items. This happens when properties aren't checked after an upgrade. Sometimes old settings are wiped out. The holds wizard should default to a level of title and a range of group.

CHE has noticed that, since the upgrade, when you go to get the last patron in check item status, the display is scrambled. SIRSI has promised a fix in the next sub-release.

EPL asked why staff cannot modify the title range selections in holds? Kristen will ask.

Please e-mail [slcstaff@libcoop.net](mailto:slcstaff@libcoop.net) with any other issues you would like to go on the list.

Kristen will send out an e-mail in two weeks asking for the 5 most frustrating issues. The votes will be counted, and the 5 winners will be solved even if we have to pay SIRSI for

custom programming.

CHE noted that the modify order issue is fixed.

**Round Robin** – RSV has noticed that some items on the clean holds report, when run through check item status, repeatedly come up for the same patron. Some of these items have had log scans run on them, but nothing has shown.

ROG asked when the Talk To Me change over was going to happen. The bug that prevented patrons from calling in to Talk To Me has been fixed. SIRSI is now creating a test server for SVA, the replacement to Talk To Me, but they are having OS issues. Kristen will call SIRSI for an update.

CHE wished that canceled holds stayed on a record, to aid troubleshooting.

ROG sends out CDs in padded envelopes. If you have any of these lying around, could you please send them back to ROG, as their Staples bill is getting a bit excessive.

MPL is having problems removing staff lines in edit item. She will send examples to SLC staff.

WAM asked if libraries forgave items charged on patron cards that had been lost if the patron had not reported the library card lost. Many libraries will accept a police report in lieu of having notified the library.

Kristen reminded people not to use the user lost wizard, as it creates a duplicate user record. Use modify user if the patron is in front of you. If they call, bar the record, and put a note in to check ID.

UPL has had problems the last few weeks with items returned to other libraries that are missing parts. If items are returned to a non-owning library missing parts, would people rather get partial items back with a note and without being discharged, or would they prefer the library where the item was returned attempt to get the missing piece back?

There was not a clear preference for one over the other. It was decided this issue should go to Council, since it affects more than one library.

TPL asked when the serial records for weeklies for 2004 would be available. These will be input in December. TPL asked that the libraries be notified when these were available. Kristen will send out an e-mail. Monthlies don't get new records every year.

SHL asked if a patron cancels a hold, will it appear on the clean holds report? Yes, the next day.

SCS asked if any libraries accept new books in lieu of damaged books. Yes, but most don't encourage it. ARM charges a processing fee if they bring in the book, but do not if they pay for the book. ROG encourages bringing in a new book, because they can get the item back on the shelf more quickly.

CHE asked how many libraries will look up a patron by asking their name and how to spell it

when a patron does not have a library card. No library said they did this. She also asked if circ staff were really being careful about checking ID, especially when a patron didn't have a card. Everyone said they trained staff to be careful. Several libraries will check a license once, if the patron forgot their card, and allow them to check out 2 items. MPL keeps a written list of these patrons. ARM pointed out that a new staff member told her it make the new staff member look bad when she denied items to a regular patron without a card, but another staff member allowed this.

CHE has had some problems caused by some debt collect notifications going out as MCL, rather than CHE. She has gotten checks made out to MCL. MCL does not use debt collection, so please be aware that this might cause confusion.

Canceling the bills on records that were assigned to MCL and recreating them causes no other problems.

**Next Meeting** – The next meeting will be Tuesday Dec. 9, 2003 at MCL.

### **Attendees**

Lynn Couck LEN  
Annette Goike MPL  
Cindy Taskin ROG/ROK  
Jackie McIntyre RSV  
Sandy Casamer MCL  
Ronna Hirth HPW  
Carol Sterling EPL  
Holly Kirsten CHE  
Lynn Minor CHE  
Mary Radachy SCS  
Rosemary Orlando SCS  
Gloria Pierce SHL  
Hedy Brodak TPL  
Marsha Doege UPL  
Ellen Lasky SHL  
Margaret Smith ARM  
Diane Burgeson SBL  
Oksana Urban WAM  
Kristen Valyi-Hax SLC  
Lissa Potter SLC