

Evergreen Indiana Circulation Committee Meeting Minutes

November 10, 2012

Voting members present: Jill Scarbrough, Shawn Heaton, Teresa Hudson, Christina Hime, Chase Martin, Virginia Jensen, Judi Terpening, Rose Bryan, Sheryl Sollars

Members not present: Karen Jewell, Shawn Parker

Non- Voting members present: Shauna Borger, Megan Maurer

10:15 AM, meeting called to order.

Approval of Agenda

Agenda approval with following additions, lost items, domain names, update to 2.1. Motion by Christine Hime, Sheryl Sollars motion carries.

Shauna added the following new items to New Business:

- A discussion of the procedure for dealing with lost items.
- A discussion of invalid domain names and what the committee recommends.
- Preparing for the upgrade 2.1 in early December 2011.

Minutes approval from September 20, 2011 meeting. Motion by Sheryl Sollars, Jill Scarborough motion carries.

Committee Reports

Indiana State Library (reported by Shauna Borger)

Blue library cards

Finalized blue card order. Each library expected to let Shauna know they have approved their own cards next week by e-mail, not fax. Shauna finalizes the orders with the vendor. Plan to use the cards beginning January 1, 2012. There will be no mass expiration date for reciprocal borrowers.

Christina Hime asked about whether there is there a process to send notice out that card is expiring? Can Shauna follow up if e-mails going out to tell people they're card is expiring.

Does expiration date effect the loan duration? Not so anymore.

Questions of how to deal with cards orders in the future.

We would use SurveyMonkey for blue Reciprical cards just like we use for green cards now.

Payment Pilot

Shauna is resending the October 14th e-mail Credit Card Pilot Description. Documentation is approved by state library board of accounts. We now have signed agreements from all Evergreen libraries to accept payments for other Evergreen libraries. Currently, only libraries in pilot to participate. Boone County is part of pilot. At first in the implementation process, we would only use cash and checks for payment. Anticipated start date March 22012. Shauna can prepare to accept invoices.

Acquisitions pilot progress

Acquisitions webinar in fall 2011. Working on Title Source with Baker and Taylor and Front Page with Ingram. Planning several sessions for 2012 for Acquisitions. Advanced Circulation Training (Megan, Christine, and Virginia). Objective is to create Online Training at Anytime. Sessions should be less than 2 hours. Completion goal is Spring 2012

Old Business

Adding more members to Circulation committee

Will send out slate of two candidates via email ballot. Committee members will have 2 weeks to reply. Shauna will bring results to Executive Committee meeting and the candidates will be formally approved.

Updates to Policy and Procedure.

All things discussed at last Circulation Committee meeting was approved by Executive Committee.

Students and computer users should be receive blue Evergreen Indiana library cards.

Delete Patron Function is for LocalAdmins.

We voted to make this function grantable to other profiles like circ1, to be approved by the Executive Committee.

New Business

Metahold and Filter by form

Virginia Jensen - When placing a hold I could go to advanced hold in 1.6 and patron wants hold large print or audio book, but now it usually refers to audio book so patron who will take either. Metahold will grab anything by that title, not the type. Advanced hold used to give lp, reg or audio, now it just says books or audio. SB-The deduping script several items under one record and 1 was audio it all went into that. This is probably more data(catalog issue than software). Metahold in advanced hold placementt just above place hold. Copy is specific copy down to barcode and title is just by title. Shauna is tracking these and cat issues maybe another de-dup needs to be run again. It may involve a report which compares ISBN to Circ Modifier.

Circulation Procedures – Updating Expired Patron Accounts

Added an additional statement which requires that the staff member updating the account create an alert in the patron's account notifying the home library that they have renewed the account: Patron account was updated at [name of staff member's library] on [date].

LOST ITEMS

Circ Library checks in lost item, system does not delete fines and fees.

Add an alert in the Item Attributes Screen explaining that the item was marked lost and then checked in so that it could transit back to the owning library: Lost item checked in at [name of library] on [date].

Alternate method

1. Circ lib checks in and it says it was lost, say ok, then it prints transit slip
2. Then when owning library gets item and checks in it says item was lost.

Judy- Can we set the voiding of fines and fees upon checkin at the individual library? It is important to set this policy system-wide for consistency between libraries. Jill- the system tells us enough without adding in extra notes and memos. If you get an item that is lost, just make sure it gets back to library.

Chase motion Christine 2nds

E-Mail Addresses

Can committee identify any patterns in invalid domain names. Some providers are case sensitive. E-mails do not need to be caps.

2.1 upgrade

We will have an upgrade from December 9-11, 2011 as discussed in the Weekly Update e-mail. Planning for DECEMBER 9 to the 11th, Friday 8:00am morning. Plan is to have Evergreen down all weekend for upgrade. Libraries can test offline mode . Ask Shauna questions. Encourage use of Flash tutorial for uploading transactions. Can we set consortium to not have anything due on 9, 10 and 11? Use closed dates editor for those dates but it may affect holds. PLAN is to update database first then upgrade software. This will decrease downtime during December 9-11, 2011. Download the staff client several days before the upgrade. Run in offline mode during upgrade. Then it will have auto update after this so we don't need download the staff client again. Instructions are to be sent to the consortium via Weekly Update email and listservs. Libraries should back up files everyday when in offline mode. Look through tutorial. Please remember, you can only checkout in offline mode. You cannot checkin or register patrons. No new cards, no paying fines. Shauna will be creating signage for the downtime.

A few differences between 2.0 and 2.1

- Don't have to download staff client every time we upgrade anymore.
- An individual can catalog parts of an item and a patron can check out the parts individually.

Other discussion items

Patron Account. Linking and cloning can be done at anytime. Mark a lead account, then go into options.

Patrons with a negative balance -If we have patron with negative balance send a help desk .