

URSUS Circulation Heads Meeting Minutes
30 October 2018
Bangor Public Library

Attendees:

In person: Susan Beane (LEG), Albie Dunn (INFONET), Michelle Greene (UMPI), Bill Sargent (USM-POR), Jess Isler (UMF), Ed Moore (USM-GOR), Deb Durkin (UMFK, co-chair), Barbara Higgins (BPL), Megan York (LAW, co-chair), Michelle Daigle (UMA-Bangor), Jim Roy (MSL), Emily Stowers (MSL), Ben Noeske (UMM, secretary), Lynn Uhlman (INFONET), Kathleen Spahn (PPL), Jerry Lund (UM), Andrea Thorne (UMA)

Items of business:

1. Ben appointed secretary. Minutes from the April 3, 2018 meeting were approved.
2. Campus updates, news, and announcements.
 - a. Andrea: The functions of OCLS have been absorbed by the UMA libraries. Requests for barcodes should be sent to Michelle Daigle at UMA-Bangor. Shifting stuff to make space for seating. Gave away old microfilm reader. Hired Libby Wade. Registered 25 voters. Suffered another flood, which damaged PolyCom room, maker space, and restroom.
 - b. Jerry: Attempting to have weekly 30 minute staff meetings for Circulation Department, during time when day and evening shifts overlap. Working on process of student training and fine tuning the hiring process. There is a committee to examine space usage at Fogler. Moved some Dewey books from storage to the Presidents Room (which had previously been used for current periodicals). Contract with 3M/Bibliotheca expires soon – trying to get technicians to perform one last checkup on exit gates and sensitizer/desensitizer units. A subcommittee of the Tech Cabal is working on accessibility standards.
 - c. Kathleen: New staff at circulation desk, using a free WebJunction webinar to introduce them to library culture. New self-checkout machine at main branch. Part of group looking at implementing statewide library card.
 - d. Lynn: Has been busy with DigitalMaine Repository and implementing new products. The Sierra 4.0 upgrade broke in-client statistics. Expecting to upgrade to 4.1 in a few weeks, at which point can apply hotfix for stats. Notices now have resend and auto-renewal, but the implementation seems clunky. Seeking clarity from III on best process for using these. Some improvements to prevent duplicate fines, but now might encounter an “account locked” message when attempting to waive or collect fines. Simply exit the patron record and re-open it and try again.
 - e. Ben: very few returning student workers this year, so have been doing a lot of training. Grateful for any tips on improving the training process.
 - f. Jim and Emily: New reference staff hired. Emily has been at MSL about five years and is becoming re-involved in Circ Heads.
 - g. Michelle D.: Staffing changes. Ben Treat left for BPL, Stacey Brownlie is interim director of UMA libraries. Other departures and hires at Nottage.

- h. Megan: Weeding project over summer, now a lot more space for seating. Library orientation for students. Pies and puppies event coming up.
 - i. Barbara: Just back after being out a month. BPL's email system has changed. Computers upgraded to Windows 10. Interested in the one card project.
 - j. Deb: Abatement project over the summer combined with weeding. New furniture purchased (including pods). Have found it useful to have veteran student workers train new student employees.
 - k. Ed: Now fully staffed. Have copy cataloged about 1,000 donated CDs. USM enrollment is up. Circulation statistics are up due to "textbooks on reserve" project (now two years old, attempt to have a copy of all required texts for 100 and 200 level courses on reserve). Partnership with bookstore, which has no physical presence on Gorham campus: library serves as pickup point for ordered and paid for books. Looking to have more events hosted in library.
 - l. Jess: A half-time position retired and instead of replacing are purchasing Digital Commons. Rearranged books to make room on second floor for study/event space. Hope to eventually have money to renovate and buy new furniture. Have about 30 student workers, would like to follow model used by IT Desk where veteran students help train new ones. Will be attending Access Services Conference in Atlanta in a couple weeks.
 - m. Bill: Osher Map Library received donation of all maps in original Osher collection, plus endowment. Creating a digital imaging room, with staff to work on digitization projects. Have submitted about 8,000 items to Digital Commons so far this year. Acquired a new microfilm reader that will scan to PDF.
 - n. Michelle G.: Receiving donation of Civil War material. Have a temporary employee until February, but hope to keep longer. Juvenile collection has returned to the library.
 - o. Susan: Have a new reference librarian. Library received Legislative Staff Achievement Award from National Conference of State Legislatures for ongoing digitization projects.
3. Visit from Ben Treat. The URSUS Directors are looking for ways to move URSUS forward and so would like committees to be more innovative and proactive. They also want to make sure every committee has an appropriate charge. It was noted that the Circulation Manual opens with a mission statement, and we all agreed that it gave us sufficient guidance to do as the Directors asked.

We then discussed ways to improve communication between the committees and the Directors. Suggestions: agendas for Directors meetings could be distributed so committees are aware of what issues are being discussed by the Directors. Encourage individual Directors to communicate with committee members in their library. It was noted that a few other committees (e.g. Reference, Cataloging Standards) have a Director as member, so it was suggested that perhaps a Director could join the Circ Heads. Alternatively, perhaps a representative of the Circ Heads committee could attend some portion of some of the Directors meetings. Ben T. noted that the minutes from the Directors meetings are supposed to be posted somewhere on the Maine InfoNet site (<http://www.maineinfonet.org/ursus/governance/>),

though they have fallen far behind. It was suggested that if they were posted then reviewing them could be made part of our regular agenda.

4. Paging slips. Everyone seems happy with the new paging slips. All printing issues have been resolved.
5. Encore. Some glitches have been observed. Albie explained that some of these are due to some libraries having multiple location codes in bib records. There will have to be some clean up and consolidation. Albie also noted that there is no phrase search in Encore, only key word searching. Using quotation marks will allow you to perform something very much like a phrase search.

UMA has changed their website to use the new catalog. UMF is almost ready to make the switch.

6. Billing process. At our previous meeting Deb had asked that all libraries document their billing process, but only three did so. Her question is how a library's purchasing department knows whether or when a bill has been paid. Perhaps by monitoring GL reports? Michelle G. said that the UMPI billing office notifies the library when it receives a payment.

The manual indicates that if attempts to retrieve an item from a patron are unsuccessful, then the patron's library is responsible for paying for the item. It was noted that some university libraries (e.g. USM, UMF, UMFk) are able to place holds on students' accounts (preventing them from registering for courses or getting transcripts) for any billed items, whereas others (e.g. UM) can only do so if billed items are from that library. It was agreed that the former gives libraries more teeth and increases the likelihood of getting materials back.

Jerry suggested that as a system we shouldn't be charging each other for replacing billed items. It seemed that the committee agreed and a subcommittee (Jerry, Deb, Michelle D.) was appointed to formulate language for a proposal to this effect to be submitted to the Directors.

7. Deleting (academic) patron records. Albie explained that patron records are loaded from MaineStreet once every one or two weeks. This process either updates the extract date (if an existing record with matching PeopleSoft ID is found) or creates a new record. At the end of the semester a student's affiliation with a university may have ended, but the system would not be able to tell and would continue to allow the account to place requests and access e-resources. Albie proposed that at the end of the add/drop period a "d" would be entered in the MBLOCK field of the Sierra patron record for non-current students. This would prevent requests and access to e-resources. At some point these records would be deleted (assuming they don't have fines or items checked out).

Albie cautioned that if a library converts a student record to another type of record (for example, a graduating student becomes a community patron), the PeopleSoft ID and extract date fields should be removed.

Barbara noted that BPL deletes patron records that have been expired for three years (assuming no fines or items checked out). After seven years non-returned items are given up for lost and deleted, and the associated patron record can be deleted at that point.

There was also some discussion/confusion about whether UMPI or UMA was responsible for creating/maintaining patron records for Maine School of Science and Mathematics students.

No consensus was reached on Albie's proposal before we ran out of time and moved to the next item.

8. INN-Reach Reports. Lynn advised that all INN-Reach reports should be run at least twice a week (ideally daily). She had distributed the following links that contain more information about the reports, as well as guidance from MIN about how to deal with the results of the reports:

<https://maineinfonet.freshdesk.com/solution/articles/1000252371-inn-reach-reports>

https://ursus.maine.edu:63100/sierra/admin/help/Default.htm#sril/sril_reports.html

She noted that if INN-Reach reports haven't been run regularly there may be a backlog of issues, but once those are dealt with these reports shouldn't require much of a time commitment. If a library encounters something they can't resolve on their own they should submit a ticket to MIN. It is important to keep on top of these because it helps prevent clutter, corruption, and weirdness. MIN work study students will routinely run INN-Reach reports to catch items that are more than two months old.

Some similar reports for within-system requests: a report of current holds can be obtained in Sierra (Go -> Circulation -> View Outstanding Holds). Would have to use Create Lists to get a report on items too long in transit.

Libraries were encouraged to clear their holdshelf regularly, so that items not picked up within deadline (ten days for Loan Rule 9) get returned to their home library.

MIN will also be distributing reports about messages that get bounced to the ursus.noreply@maineinfonet.org address (which appears as the reply-to address on many circulation notices sent out by Sierra, though some libraries have set their own reply-to address) so that libraries can clean up incorrect email addresses in their patron records. These will be distributed once or twice a month. Side note: there is a Notice Preference field in patron records that can be used to indicate patron's preferred mode of contact.

It is possible to set up Notices to run automatically. URSUS is currently set up so that this would happen only once per day, at 6 am. Instructions for doing this are available in the MIN Support Center (<https://maineinfonet.freshdesk.com/support/solutions/articles/1000230451-notices-create-and-edit-notice-jobs>). There is no way to see what notices were sent out this way, but there is a way to see how many notices were sent (Tools -> Notice History).

9. Deb noted that the Directors have asked each committee to have at least one meeting per year where all members try to be present in person (this current meeting was ours for 2018). Our next committee meeting is scheduled for Tuesday, April 2 2019 at Bangor Public Library. Both Megan and Deb have served their terms as co-chairs of the committee, so anyone interested in taking on a leadership role should contact them.