

# V-Cat Meeting Minutes

Thursday, October 2, 2014, 9:30 a.m.

Marathon County Public Library, 300 N. First St., Wausau, WI

## Call to Order:

M. Dunn called the meeting to order at 9:30 a.m. Roll call was taken and a quorum was present.

## Members Present:

V. Calmes, S. Bedroske, K. Metzke, C. Lemerande, J. Bobrofsky, B. Schemenauer, A. LaRoche, E. Schwartz, M. Taylor, J. Gustavson, S. Lehr, T. Blomberg, C. Huston, E. Brewster, M. Dunn, C. Celestina-Smith, J. Beloungy (via GoToMeeting), M. Gobert (via GoToMeeting).

## Also present:

I. Christman, B. Krombholz, M. Sepnafski, S. Stevens, D. Litzer, M. Stachowiak, L. Giordano, L. Meyer.

## Absent:

E. Grunseth (proxy: A. LaRoche), C. Taylor (no proxy), D. Korenuk (proxy: A. LaRoche), K. Heiting (proxy: J. Bobrofsky), a representative from Rhinelander District Library (no proxy), L. Petersen (no proxy).

## Approval of the Agenda:

J. Bobrofsky moved to approve the order of the October 2, 2014 V-Cat meeting agenda. S. Lehr seconded. Motion carried.

## Approval of the August 7, 2014 Minutes:

S. Bedroske moved to approve the August 7, 2014 V-Cat meeting minutes. E. Schwartz seconded. Motion carried.

## V-Cat Financial Report:

I. Christman presented the V-Cat July and August 2014 financial reports and summary for approval. J. Gustavson moved to approve the financial reports and summary as presented. M. Taylor seconded. Motion carried.

## Bibliographic / Interface Committee:

S. Stevens indicated that there will be a forthcoming Bibliographic / Interface Committee meeting. An agenda is set including Z39.50 training and issues that have been forwarded to her by V-Cat members, but a date for the meeting has not been determined.

## Cooperative Circulation Committee Report:

I. Christman delivered the report on behalf of C. Taylor. I. Christman stated that C. Taylor is planning a meeting of the Cooperative Circulation committee in November to discuss options for a "holds consultation" with representatives of Innovative Interfaces Inc. The primary goal of this consultation would be to better understand how our installation of Sierra treats holds and our options for fine-tuning this mechanism. This is common practice for libraries a year or two after migrating to Sierra. A report on this consultation would be shared at a future V-Cat Council meeting.

I. Christman also stated that there has been some confusion over the behavior of holds due to holds being canceled before being filled, or assumptions that did not match the actual loan rules being applied in certain cases. I. Christman also stated that B. Krombholz would translate and explain libraries' loan rules and related factors in forthcoming consultations.

I. Christman stated that Sierra 1.2.2 was released earlier in the week and is now being considered for implementation, and that we had skipped the previous release because it was not vital and there were reports of it causing problems with the Create Lists function. I. Christman also stated that the newest release may fix a "known issue" with holds according to the Innovative support website.

M. Stachowiak noted that the Marathon County Public Library has found expired holds on their hold shelf that weren't on the Hold Shelf Report and is wondering whether this is a Sierra issue or human error. MCPL has been checking their hold shelf for expired holds manually on a weekly basis to watch for irregularities and suggests other libraries might want to do this too. MCPL has also found other libraries' items on the MCPL hold shelf with the incorrect status of "available." MCPL continues to investigate this issue.

E. Schwartz mentioned the paging lists are sometimes difficult to read and that it's possible to miss items that should be pulled. T. B. Scott is keeping their copies of these lists on file to cross-check potential hold problems. MCPL also is doing this.

S. Stevens noted that some T. B. Scott patrons were hitting their limit of 75 holds in part due to placing holds on items with records created well in advance of items' publication dates, and wondered if this limit could be increased. I. Christman said she would pass this along to the Cooperative Circulation committee for consideration.

E. Brewster noted that sometimes items that could be sent from her library to fulfil a hold are not on her paging list, and she has noted similar situations with other libraries' items. I. Christman replied that there are several normal scenarios that may account for this – e.g., items not truly available at the time the hold is placed, but showing as available later – but that this can be considered in the holds consultation as well. I. Christman asked everyone to submit irregularities like this as tickets to WVLS so they can be documented.

E. Schwartz and S. Stevens mentioned it would be helpful if the "View Outstanding Holds" report could be saved as a spreadsheet and/or sorted by date, status and other columns. As this time, this option is not available.

M. Gobert (via GoToMeeting) noted that libraries should be doing inventories of their collections to resolve many of the aforementioned problems with holds and incorrect item statuses.

Multiple attendees noted that "high request" items that shouldn't circulate to other libraries have been requested and sent for patrons of other libraries anyhow. Some attendees noted that in these cases, the item type was set to "0 - Adult Book" and the correct item type needed to be re-selected.

#### [WVLS / V-Cat Steering Committee:](#)

Stacy Stevens noted that there will be a steering committee meeting called to discuss the V-Cat Strategic Plan in the near future.

#### [Other Sierra issues:](#)

I. Christman passed out the proposed 2015 V-Cat Council meeting schedule for consideration.

M. Stachowiak asked if there is a "wish list" for future Sierra changes. I. Christman noted that she has aggregated suggestions like these into a pool for the Strategic Planning committee to prioritize.

M. Stachowiak suggested telephone notifications could be sent in evenings and on weekends to improve the pickup rate of holds and better patron notification overall. I. Christman suggested that the Cooperative Circulation committee could look at this.

M. Stachowiak wondered why the links in email notices are sometime "clickable" and other times not. B. Kromholz replied that the email notices are always sent as plain text and that the links are not inherently "clickable," but some email programs will detect plain text links and make them so.

M. Stachowiak wondered why it takes a while for hold slips to print, and whether this was because of all the data Sierra was trying to pull together for the print template. Several attendees suggested new receipt printers have improved this for their libraries. I. Christman said this would be investigated.

M. Stachowiak wondered about a past suggestion by former WVLS staff member Kyle Schulz to seal or wrap in-transit items in some fashion to indicate items are undamaged and without missing pieces – possibly including staff initials. I. Christman offered to pass this on to the Courier committee.

M. Stachowiak noted that printed notices do not show patrons names correctly when their names include suffixes such as "Jr." and that reorganizing the name field to improve how it appears in print adversely affects how the name is sorted when browsing for patrons by name. I. Christman suggested submitting this issue as a ticket.

M. Stachowiak wondered whether the number of checkouts on an item shown in Sierra includes checkouts from Horizon, too. I. Christman demonstrated the 945 item field and explained that this field contains a lot of past Horizon data, including pre-Sierra checkouts.

M. Dunn thanked the group for their patience and assistance during the Tomahawk library remodeling project.

High Demands Demo: I. Christman and S. Stevens demonstrated Sierra's "High-Demand Holds" function. This function generates a report that shows local or system-level holds on titles, allowing libraries to see whether additional purchases of a title are needed to meet demand. A "cheat sheet" for creating this report would be added to the WVLS website under Training: <http://wvls.org/training>.

It was noted that the V-Cat Steering Committee agendas, minutes and members can't be found on the WVLS website. I. Christman said she would investigate adding these to the site.

J. Gustavson noted that it might be better if Sierra would indicate the impending expiration of a patron's account further in advance. This would avoid the situation where patrons check out items with due dates beyond the expiration of their account.

I. Christman called for venue suggestions for the Christmas Lunch. Great Dane was suggested.

#### Adjournment:

S. Bedroske moved to adjourn the meeting. E. Schwartz seconded. Motion carried. The meeting adjourned at 11:05 am.

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SUBMITTED: 11/19/2014

BEN KROMBHOLZ, RECORDER