

Library Coordinator Meeting

March 20th, 2019

System Update

► System status:

- Complex search queries on the WebPAC were the cause of the sporadic slowness issues
- III is monitoring the system to identify IPs that are making these requests so we can block unknown IPs

We have identified IPs for Capira and Wowbrary and are working with them to provide continued access to the data with out compromising the vendor's usage.

System Update

Third Party Vendors and Sierra Data access

- ▶ Services that require access to data from Sierra (bib, item, patron info) - open a ticket with PALS
 - ▶ Preferred method to access Sierra information is through the API
- ▶ Automated searches of the WebPAC, should be done minimally and between the hours of 9 pm and 6 am
- ▶ The Technical Advisory Committee (TAC) is working on the Best Practices for third-party vendors. We will post the information to the Gateway when completed

System Update

- ▶ We're in ongoing conversations with Innovative about a number of issues
- ▶ Program Registration will not be enhanced
 - ▶ Member Services hosting event calendar demos in April and May
- ▶ No plan to integrate Overdrive into WebPAC

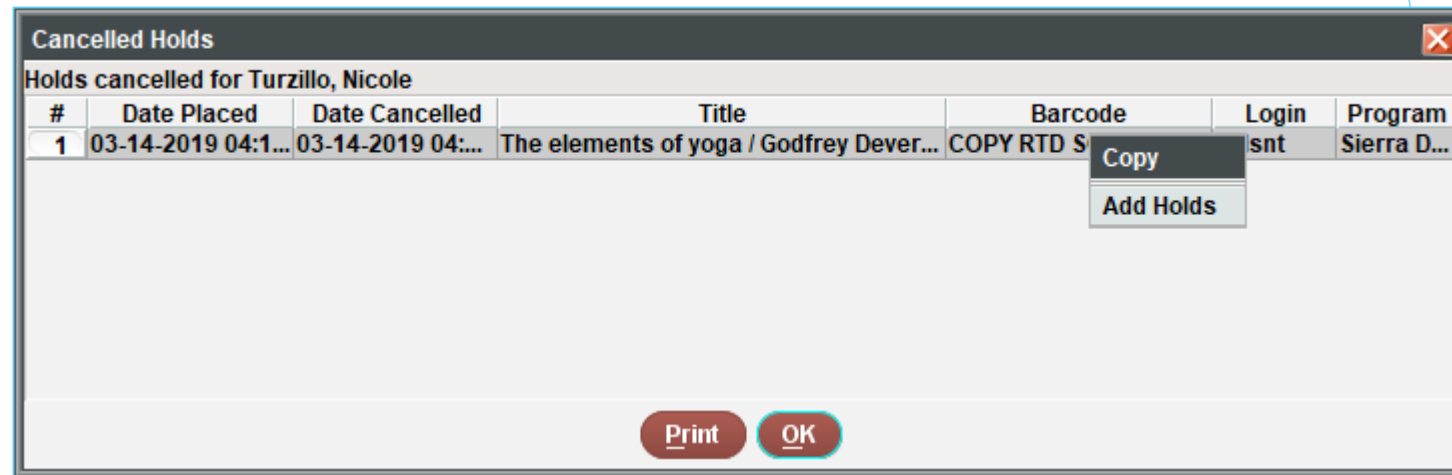
System Update

- ▶ Upgrade 4.2 - Coming in April, Date TBD
- ▶ Encore 4.8 - Coming soon
- ▶ Known Issues fixed in 4.3:
 - ▶ Holds missing from Sierra High Demand Holds and View Outstanding Holds reports
 - ▶ Decision Center Top Titles report
 - ▶ Collection Agency Updated Patrons reports include patrons from different settings

System Update - Features from Sierra 4.1

View Canceled Holds Table - date placed/view record/place new hold

- ▶ Right click to Add Holds
- ▶ Takes you to the bib to replace the hold



#	Date Placed	Date Cancelled	Title	Barcode	Login	Program
1	03-14-2019 04:1...	03-14-2019 04:...	The elements of yoga / Godfrey Dever...	COPY RTD S	snt	Sierra D...

- ▶ Sierra 4.2 adds ability to place a new hold using information from a cancelled hold, and insert that hold either at the end of the hold queue or by the original hold's placed date

System Update - Features from Sierra 4.1

- ▶ Keyboard shortcuts or menu dropdown to find text within a record
 - ▶ Ctrl + f for find box
- ▶ Staff can copy an entire field, including MARC fields and subfields, to the clipboard for pasting

The screenshot shows the Sierra library system interface. The browser address bar indicates the URL is `search.livebrary.com` and the record ID is `b5277434x`. The interface includes a menu bar with options like File, Edit, View, Go, Tools, Reports, Admin, and Help. The main header displays the 'sierra' logo and a 'FUNCTION' dropdown set to 'Place Orders'. Below this is a search bar with a 'Browse' button, a dropdown menu set to 't TITLE', and a search input field containing 'the avengers'. A 'Search' button and a '+ Local' dropdown are also present. To the right of the search bar are icons for 'Insert', 'Save', and 'View'. A 'Find' dialog box is open, showing the text 'Robert' in the search field and '1/2' in the results field. The main record area displays the record ID `b5277434x`, the last updated date `03-06-2019`, and the created date `07-13-2018`. The record content is organized into a table with columns for field numbers, subfield indicators, and the field text. The fields include:

Field Number	Subfield Indicator	Field Text
ADD TITLE	248 3 0	Infinity war
ADD TITLE	248 3	Marvel's Avengers : bInfinity war
ADD TITLE	248 1	At head of title : aMarvel Studios
PUBLISHER	264 1	[Burbank, CA] : bMarvel Studios, c[2018]
PUBLISHER	264 2	Burbank, CA : bBuena Vista Home Entertainment
PUBLISHER	264 4	c©2018
PHYS DESC	300	1 videodisc (149 min.) : bsound, color ; c4 3/4 in.
PHYS DESC	336	two-dimensional moving image btdi 2rdacontent
PHYS DESC	337	video bvd 2rdamedia
PHYS DESC	338	videodisc bvd 2rdacarrier
PHYS DESC	344	digital boptical gsurround gsterео hDTS-HDMA 7.1 hDolby digital 2.0 2rda
PHYS DESC	347	video file bBlu-Ray lregion A 2rda
PHYS DESC	380	Motion picture
SERIES	490 0	Marvel
SERIES	490 0	Avengers
SPEC NOTE	511 1	Robert Downey, Jr., Karen Gillan, Elizabeth Olsen, Josh Brolin, Carrie Coon,

Annual Cleanups

- ▶ Expired patrons - 3 years expired / no activity
 - ▶ Review Files in Create Lists #188, 189, 190
- ▶ Program registration - Manage and Delete Past Programs
 - ▶ <https://portal.suffolklibrarysystem.org/node/1496>
- ▶ YTDCIRC & LYRCIRC - Updated January 1
 - ▶ Inn-Reach - YTDCIRC field of the real item record is not incremented when the Borrowing Library needs to insert the barcode. CHECKOUT TO REMOTE SITE YTDCIRC STATS
- ▶ Fines older than 6 years - Purged

Patron fines purge

- We purge fines older than 6 years in accordance with NYS Law

Fines Paid

Payments Made [redacted] (Total Paid = \$0.00)

Invoice	Adjustment	Amount Paid	Date Paid
676505		\$0.00	01-01-2018
652926	Manual Charge	\$0.00	01-11-2019
652876	Manual Charge	\$0.00	01-11-2019

Paid Fine Detail

Payments Made [redacted]

Detail

Invoice: 652926
Charge Type: Manual Charge
Call Number:
Author:
Barcode:
Description: The Genius in All of Us due 10/2010
551.234
Charge Location: cuaw1
Statistics Group: 999
Checkout Date:
Due Date:
Assessed Date: 05-04-2011
Date Paid: 01-11-2019
Payment Status: Purge
Login: sclsek

Balance

Item Charge: \$26.95
Processing Fee: \$0.00
Billing Fee: \$0.00
Total: \$26.95
Previous Paid: -\$0.00
Amount Paid: -\$0.00
Amount Due: \$26.95

Reinstate Fine Print Close

Helpdesk Support Reminders





- ▶ PALS Support Hours
 - ▶ Monday- Friday 9am to 9pm
 - ▶ Saturday 9am to 5pm
 - ▶ Sunday 12pm to 5pm

- ▶ Daytime phone 631-286-1600
- ▶ Nights/Weekends 631-213-7257 - leave a message
- ▶ Email help@suffolknet.org
- ▶ Helpdesk sclshelp.freshdesk.com

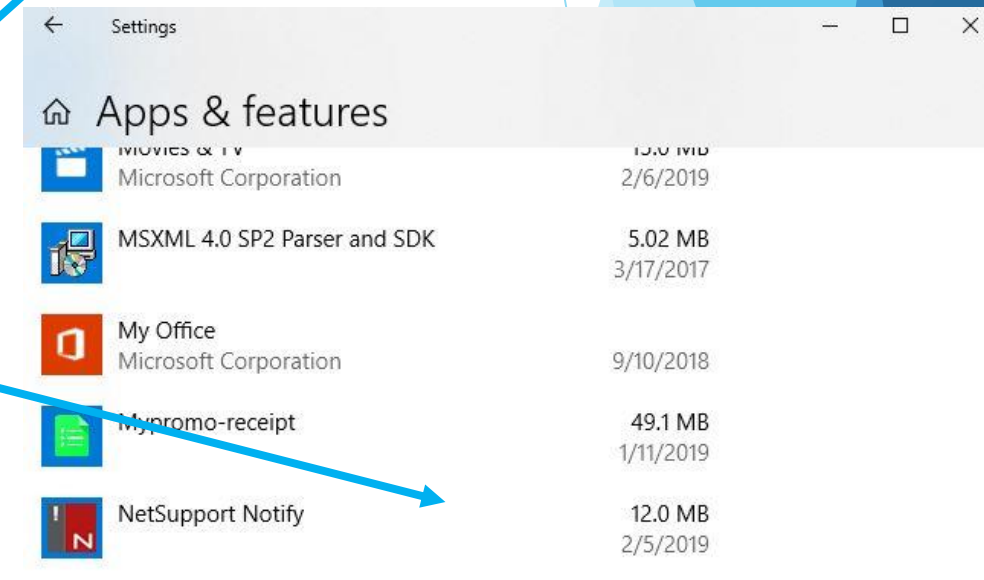
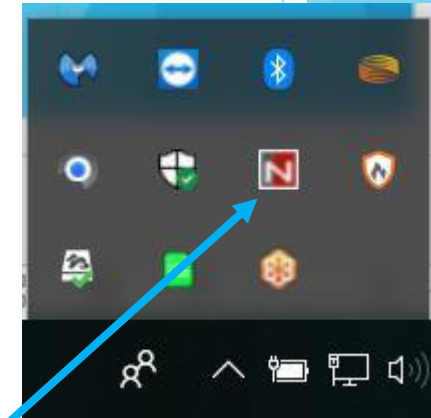
PALS Service Alerts

- ▶ Netsupport Notify
 - ▶ This is the pop-up on up to **3 stations** in your library



- ▶ Uninstall if switching to a new computer check either your icon bar or “add or remove” feature
- ▶ Installs tab of the Gateway

<https://portal.suffolklibrarysystem.org/node/6135>



PALS Service Alerts



Twitter

- ▶ Messages can be viewed on Twitter without an account
- ▶ There is an option to receive text alerts if you do have an account

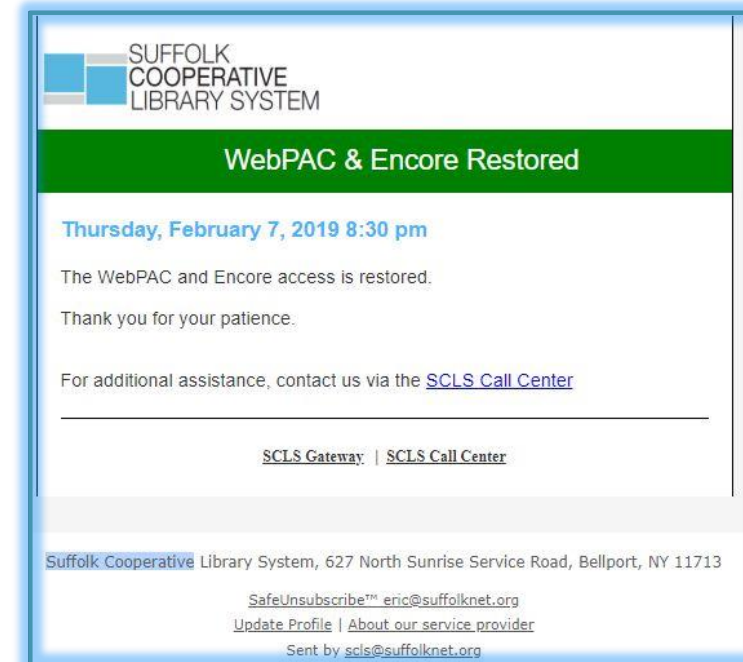


▶ SCLS Email notifications



- ▶ SCLS Helpdesk account adds you to the SCLS Alerts email
- ▶ Alerts sent to every one who is signed up

<https://portal.suffolklibrarysystem.org/node/3679>



PALS Service Alerts - Updated

SCLS Email Notifications:

- **CRITICAL ISSUE:** Log out of all Sierra Sessions
- **URGENT ISSUE:** Sierra is slow - Circulation only - Do not create new records
- **ALERT NOTICE:** Use Offline if Sierra is too slow to serve your patrons at checkout. Do not upload until you receive a PALS Message



PALS Service Alert

CRITICAL ISSUE

Log out of all Sierra sessions. Do not log back in until you receive another message from PALS.

Use Offline only for checkouts.

OPAC status:

Encore status:

LI Link status:

For additional information or assistance, contact us via the [SCLS Helpdesk](#).

Creating a Perfect Helpdesk Ticket

- ▶ Include as much information as you have (even if you're not sure we need it)
 - ▶ Record numbers/barcodes
 - ▶ Login used
 - ▶ Error messages
 - ▶ Screenshots
- ▶ Double Check the issue before putting the ticket in, if you're reporting for someone else (you might catch something they didn't)
- ▶ Include specialized information that we may not know
 - ▶ Our DVD's aren't supposed to check out to Juv cards, we limit Ptype XXX to 4 Video Games, we're closed Tuesdays

Creating the Perfect Helpdesk Ticket

- ▶ Open one ticket per issue
 - ▶ One for the Circulation issue, another for the Cataloging question, a third about the Karaoke machine. These all go to different departments
 - ▶ Open a new ticket if the issue has previously been resolved and closed, rather than re-opening an old ticket. Information can get lost this way
- ▶ Reply to the email without changing the Subject, or reply directly in Freshdesk
- ▶ Please know that we'll get back to you as soon as we can

DA/ILL & Lost In Transit

- ▶ Next round of DA/ILL starts on Wednesday May 1st
- ▶ Payments will be in July 2019
- ▶ Date range will now be six months to one year overdue
- ▶ Lost In Transit starts May 1st
 - ▶ <https://portal.suffolklibrarysystem.org/node/1358>

Create List Etiquette

- ▶ Please do not use Create Lists or Statistics functions on the first business day of the Month
- ▶ Create Lists is a shared resource, please be considerate of your fellow list makers
- ▶ Run it, Export it, Delete it
- ▶ Files should be named in lower case letters following this naming convention: (library code) (list name) (date created) (user initials)
- ▶ If you need it for more than 3 days, put a ticket in the Helpdesk

<https://portal.suffolklibrarysystem.org/node/1097>

Library Etiquette

Lesson #7

RESHELVING BOOKS



**Philip puts his books back
in the wrong place.**



**Peter uses the red cart for
unwanted books.**

DON'T be like Philip!!

INN-Reach

- ▶ Check INN-Reach canceled holds email
 - ▶ Virtual items will not display in View Canceled Holds
- ▶ If a patron lost a PALS item
 - ▶ Check out to Lost in Transit card in Sierra and do not call the Nassau Library
- ▶ If you get a call from a Nassau Library about payment, refer them to Nassau Library System
- ▶ Your patron paid for a lost Inn-Reach item, it shows in their fines paid, but doesn't come off the card
 - ▶ Lost and Paid process does not work with Virtual items. Check in the item. Open a ticket in the helpdesk with the item information so PALS can contact NLS

Update Library Info on the Gateway

- Library details (minus Staff Members) display on [Livebrary.com](https://livebrary.com) for patrons

Gateway

Half Hollow Hills Community Library - We moved! Visit our Chestnut Hill location for all of your library needs.

View

Edit

Outline


Access control

Node export

Devel

Map

Satellite



Location Information

Staff Members

Hours of operation

600 S. Service Road
Dix Hills , NY 11746

Arlene Lowenhar


Monday: _____

Livebrary.com

Half Hollow Hills Community Library - We moved! Visit our Chestnut Hill location for all of your library needs.

Map

Satellite



Half Hollow Hills Community Library - We moved! Visit our Chestnut Hill location for all of your library needs.

Address:

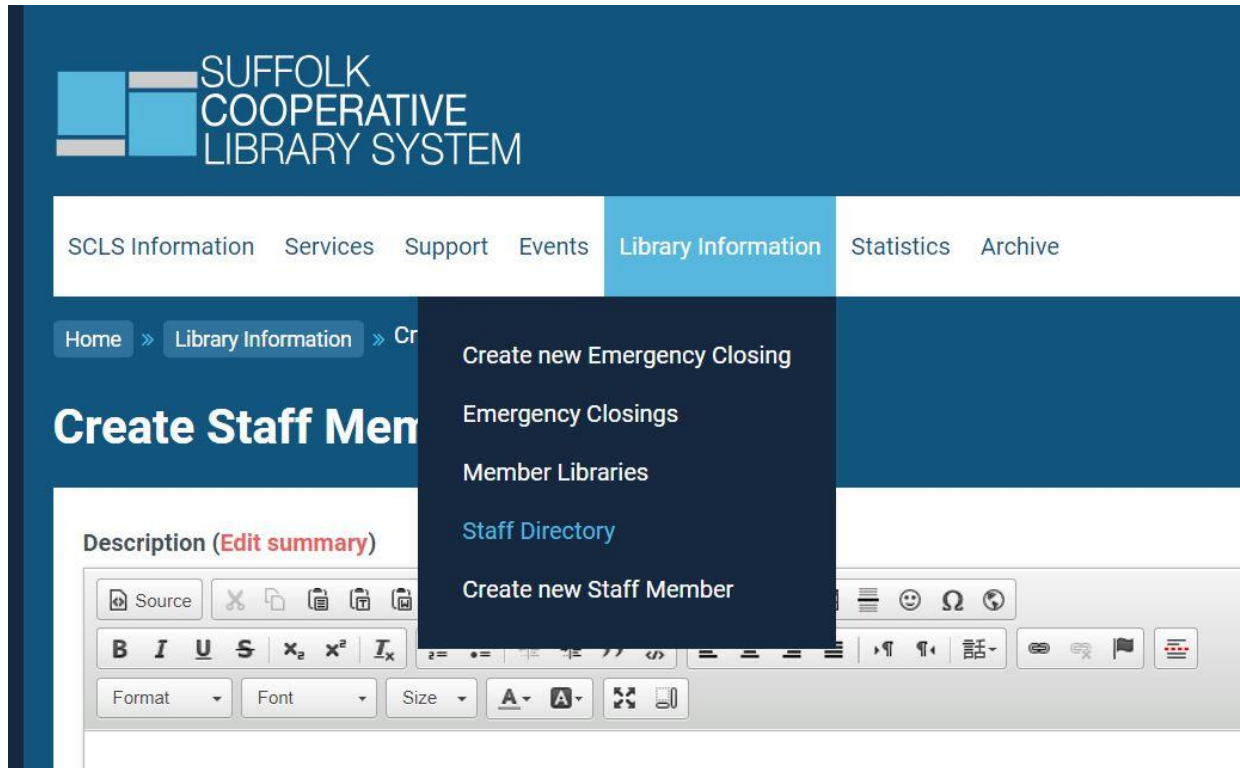
Hours of Operation

600 S. Service Road
Dix Hills NY, 11746

Sunday 12:00 - 5:00

Update Staff on the Gateway

- Library Coordinators manage the Staff Directory



Library location code links

Please make sure the URL for your “About” page is correct and up to date in Encore and the WebPac:

Clicking on your location here:

livebry.com/iii/encore/record/C__Rb3904600__Sharry%20potter_FF%3Afacetcollections%3A45%3A45%3APatchogue-Medford%3A%3A_P0%2C5__Origh...

PUBLIC LIBRARIES of Suffolk County, NY

Search [Advanced Search](#)

[Back to results](#)

Harry Potter and the deathly hallows / by J. K. Rowling ; illustrations by Mary GrandPré
Rowling, J. K., author.
BOOK | Arthur A. Levine Books, An imprint of Scholastic Inc. | 2007 | First edition.
Available at AG-Children's Area (JF ROWLING) plus 5+ more

[Request it](#)

Additional actions: [Request](#) [Email](#) [Share](#)

[Course Reserves](#)

Items ☐ only show available

LOCATION	CALL NUMBER	STATUS	Econnect	Volume
AG-Children's Area	JF ROWLING	AVAILABLE		
AG-Storage	STORAGE JF ROWLING	AVAILABLE		
AM-Kids Fiction	J FIC ROWLING	AVAILABLE		
AM-Kids Fiction	J FIC ROWLING	AVAILABLE		
AM-YA Paperback	YA PB HARRY v.7	IN PROCESS		
BH-Children's Room	J ROW	AVAILABLE		
BH-Children's Room	J ROW	AVAILABLE		
BL-Children's Room	J FIC ROW Book 7	AVAILABLE		
BL-Children's Room	J FIC ROW Book 7	AVAILABLE		
BL-Children's Room	J FIC ROW Book 7	AVAILABLE		
BL-Children's Room	J FIC ROW Book 7	AVAILABLE		
BL-Children's Room	J FIC ROW Year 7	AVAILABLE		
BL-YA Room	J FIC ROW	AVAILABLE		
BP-Storage	J FIC ROWLING	AVAILABLE		
BP-Young Adult Section	J FIC ROWLING	AVAILABLE		
BW-Adult Collection	ROWLING	AVAILABLE		
BW-Adult Collection	ROWLING	AVAILABLE		
BW-Children's Room	J ROWLING	AVAILABLE		
BW-Children's Room	J ROWLING	AVAILABLE		

Should direct your patrons here:

Directions & Hours - Babylon Public Library - Google Chrome

Not secure | www.babylonlibrary.org/about/directions-hours/

Navigation

Babylon Public Library
24 South Carl Avenue • Babylon, New York 11702

Search... [Search Website](#) [Search Catalog](#)

Home • About • Directions & Hours

Directions & Hours

Babylon Public Library
24 Carl Ave, Babylon, NY 11702
5.0 ★★★★★ 5 reviews
[View larger map](#)

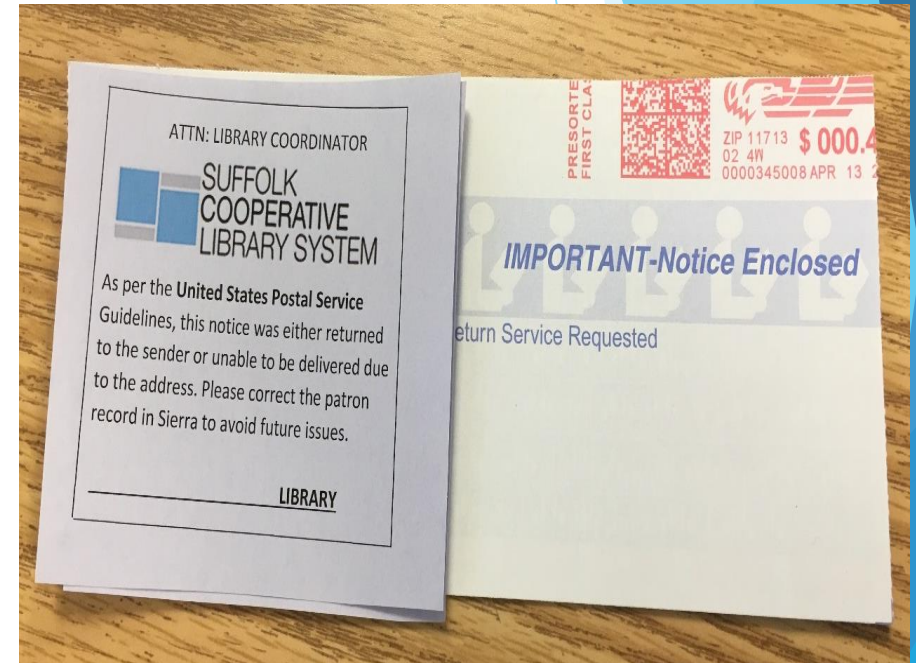
[Directions](#) [Save](#)

[History Museum at Old...](#)
[Robert Moses Statue](#)
[Argyle Park](#)
[Post Office Cafe](#)
[Babylon Public Library](#)

BL-Children's Room	J FIC ROW Book 7	AVAILABLE
BL-Children's Room	J FIC ROW Year 7	AVAILABLE
BL-YA Room	YA FIC ROW	AVAILABLE
BP-Storage	YA FIC ROWLING	AVAILABLE
BP-Young Adult Section	YA FIC ROWLING	AVAILABLE
BW-Adult Collection	ROWLING	AVAILABLE
BW-Adult Collection	ROWLING	AVAILABLE
BW-Children's Room	J ROWLING	AVAILABLE
BW-Children's Room	J ROWLING	AVAILABLE
BW-Children's Room	J ROWLING	DUE 05-04-19

Internal Use Library Cards

- ▶ The record needs to have a name and address, not filler information. The Library's Name is fine
- Invalid mailing addresses cause printed notice issues
 - If you don't want to print notices, add generic email address and set notice preference to email



- <https://portal.suffolklibrarysystem.org/node/1495>

PCode1: what do we use it for?

- ▶ TAC is investigating the uses of this field
- ▶ Do you use it for any third-party vendors?
- ▶ Help us determine the best course of action by taking our survey:
<https://www.surveymonkey.com/r/LG3ST7Y>

The dialog box titled "Select" contains a grid of 28 buttons, each representing a demographic category and a single-letter code. The categories are arranged in four columns and seven rows. The "FEMALE ADULT" button with code "j" is highlighted with a yellow border.

ADULT c	Connected 9	FEMALE a	FEMALE ADULT j
FEMALE JUV k	FEMALE PRESC o	FEMALE SR CTZ p	FEMALE STUDEN m
FEMALE Y/TEEN n	FEMALE YA l	HOMEBOUND x	J INTERNET 7
J NO INTERNET 8	JUVENILE d	MALE b	MALE ADULT q
MALE JUV r	MALE PRESCHL v	MALE SR CTZN w	MALE STUDENT t
MALE Y/TEEN u	MALE YA s	ONLINE REG z	OTHER 6
PRESCHOOL h	SCAN 5	SCLS ILL 4	SENIOR CITIZEN i
STUDENT f	YOUNG ADULT e	YOUNG TEEN g	

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Bounced Emails

- ▶ Check (and Double check) email addresses when you run your new patron report
- ▶ Move any incorrect email to a (X) note field and use the Check Email or Bounced email (g) pmessage
- ▶ Optimum/Earthlink/lesser known email providers are a majority of the bounces
- ▶ We have asked Innovative to space when email notices are sent. Currently, autonotices are sent from 6am through 8am daily
- ▶ The best practice would be to call these providers as the Library and request not to mark the server as SPAM



- ▶ If you use it, you need to tell us!
 - ▶ Used for Check-outs only
 - ▶ You must update your statistics group in the preferences at each computer
 - ▶ The error report goes to the Library Coordinator
 - ▶ Instructions on what to do with error reports and their meanings are on the Gateway
-
- ▶ <https://portal.suffolklibrarysystem.org/node/1088>

Sierra Offline Circulation

File View Go Help

Check-Out

sierra

Check-Out

Check-In

Renew

Patron Registration

Key or Scan Patron ID Barcode:

b

New Patron New Due Date

Patron Barcode	Item Barcode	Due Date	Date/Time

Preferences

Statistics Group: 999

Date Format: mdy

☐ Check barcode validity

Due Slips

☐ None ☒ One slip per patron ☐ One slip per item

Message to print on due slips:

Line 1

Line 2

Lines to eject:

Patron Registration Settings:

Tag	Prompt	Default

Clear Patron Registration Settings

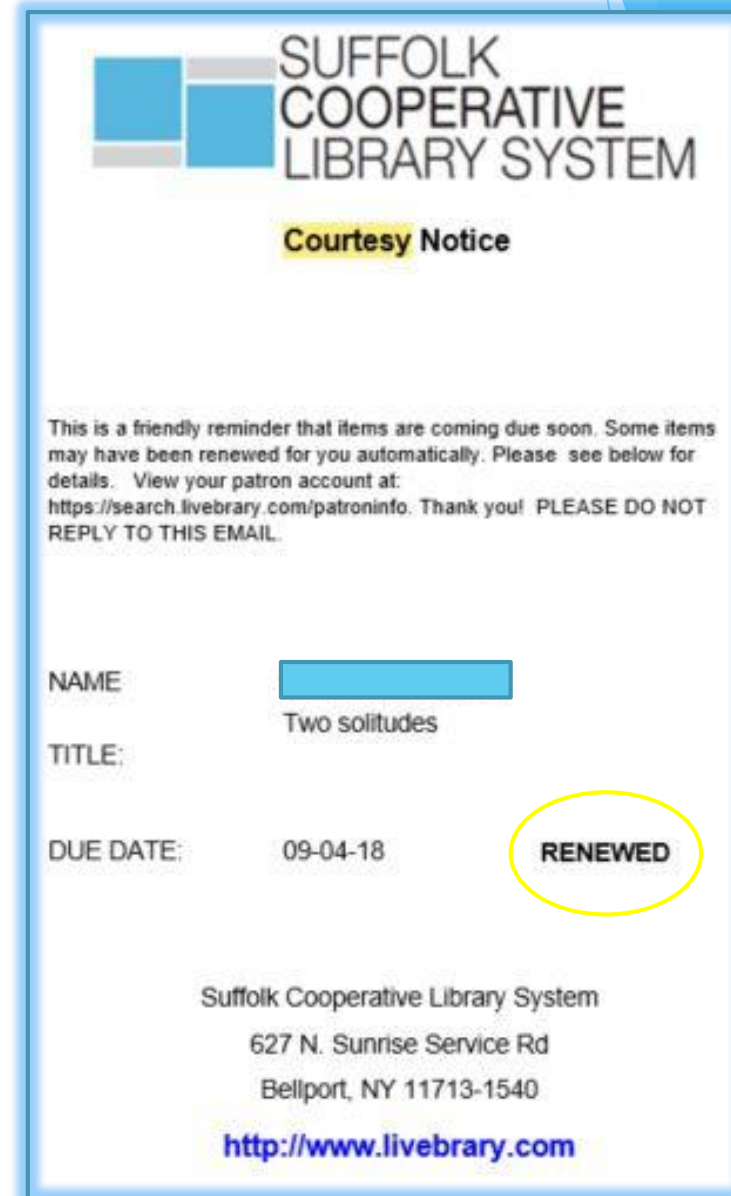
Apply Reset Quit

Transfer Patrons Best Practices

- ▶ If the patron is moving from another **Suffolk County library district**, and a patron record from their former Home Library exists, check to see if they are in collections
 - ▶ If the patron is in collection with their former Home Library, create a new record for the patron and contact the other library
- ▶ Any existing checkouts, holds, fines or bills and program registrations will remain on a Transfer Patron's record. Your library will be accepting the responsibility for their transactions at the time of the transfer if those items become long overdue and are reconciled on the quarterly DA/ILL list
- ▶ Local policy applies when it comes to fines, overdues and billed items
- ▶ <https://portal.suffolklibrarysystem.org/statistics/pals-reports/pals-monthly-reports>

Autorenew Reminder

- ▶ The PALS Executive Board voted to turn this feature on June 2018
- ▶ Patrons no longer signup for the feature. It is within the loan rules
- ▶ Patrons can not opt out, but they can always return the item
- ▶ Running courtesy notices automatically renews eligible items on the notice 3 days before the due date
- ▶ 2 day & 3 day loans are not automatically renewed
- ▶ The new due date is attached to the courtesy notice
- ▶ Patrons get the notice if there is an email in their patron account and their notice preference is email. Items still autorenew for patrons with no email



SUFFOLK COOPERATIVE LIBRARY SYSTEM

Courtesy Notice

This is a friendly reminder that items are coming due soon. Some items may have been renewed for you automatically. Please see below for details. View your patron account at: <https://search.livebrary.com/patroninfo>. Thank you! PLEASE DO NOT REPLY TO THIS EMAIL.

NAME:	[Redacted]
TITLE:	Two solitudes
DUE DATE:	09-04-18
	RENEWED

Suffolk Cooperative Library System
627 N. Sunrise Service Rd
Bellport, NY 11713-1540
<http://www.livebrary.com>

Notices

- ▶ For libraries that run their own notices, **do not change** the default settings
 - ▶ Overdues: send to email and to print
 - ▶ Bills: send to email and to print
- ▶ This ensures that patron preference is not ignored, the notice is sent and it is consistent Consortia wide
 - ▶ Otherwise if you don't send to print but the patron preference is print, they will not get a notice and so on
- ▶ SCLS adopted this method in July 2018 for all notices run at SCLS





Available Trainings - Here or at your library

- ▶ Sierra Troubleshooting
 - ▶ Connections, jar files and error messages
- ▶ Create Lists
 - ▶ Overview and how-to for all staff
- ▶ Mobile Worklists
 - ▶ Hands on for all staff
- ▶ Sierra Basics
 - ▶ Geared toward Public Services staff
- ▶ Sierra Circulation Tables -**NEW!** At SCLS on April 10th, 2pm
 - ▶ How patron and item codes work to manage your item circulation

Upcoming Meetings

- ▶ May 22 - Sierra Update - Webcast available
- ▶ June 13 - PALS Technical Services Roundtable
- ▶ July 11 - PALS Circulation Roundtable
- ▶ September 16 - Library Coordinator's Meeting - Webcast available

Questions?



Thank you for coming!

