

Circulation Users Meeting

December 11, 2013

Hosted by the Seekonk Public Library

Meeting Minutes:

Libraries in attendance: Denise Charland (Acushnet), Brian Avery (Attleboro), Vicki Dawson (Berkley), Ann Gerald (Bridgewater), Sheri Torres & Paula Sitarz (Dartmouth), Britt Grealish-Rust (Dighton), Marilyn Bastarache (East Bridgewater), Joan Roan (Easton), David Raymondo (Fall River), Casey Pittsley (Freetown), Jean Gallant (Halifax), Diane Brennan (Lakeville), Barbara Sheffield (Mansfield), Molly Driscoll (Marion), Carolyn Michaud (MMA), Melissa Guimont (Middleboro), Joseph Fernandes (New Bedford), Sarina Bluhm (Norfolk), Ellen Casaccio (North Attleboro), Kathy Trepanier (Norton), Linda McCollum (Pembroke), Paul Cutler (Plainville), Desire Palmer (Rehoboth), Jen Frasier (Rochester), Marge Bradley (Seekonk), Sephi Alves & Marie Shea (Swansea), April McDermott (West Bridgewater), Jane Young (Westport), Claudia Schumacher (Wrentham), Ben Phinney & Laurie Lessner (SAILS)

New - Training Checklist! (see handout)

- SAILS was able to adapt a skills checklist for new staff from Winnefox, a library consortium in Wisconsin.
- We want to use this as a tool to make training easier and more consistent throughout the network
- Use for new staff and to have current staff check what skills they might be lacking
- This will be posted on the staff site under Circulation

Patron Records

- Using or updating academic and K-12 records
 - Public Libraries can only modify patron records from a public library
 - Some academic libraries will allow public patrons to use the library, but they still cannot modify the records
 - Academic and K-12 records can only be used or modified at the owning institution
- Removing users – with barcode only (see handout)
 - Previously, we couldn't allow libraries to remove users due to the possibility of accidentally removing a system user
 - System users are now protected
 - Libraries can continue to back date the expiration date on records if they wish, but they are now allowed to use the remove user wizard if they wish
 - Libraries should only remove their own patrons
- Usercat3 vs Phone1 in notification
 - Usercat3 tells the system which notification to use regardless of what is entered into Phone1

- Phone1 is for staff reference.
- The first phone field displays on hold slips and Workflows pop-ups
- Change the patron to a different notice method if you can't touch base with them to fix errors
- Taunton puts UPDATE after the phone number in Phone1 to tell staff to update their notice info. Anyone can do this if they choose
- You can still use any of the other phone fields in a record to format differently if you choose. Phone1 must be included. It must be the first phone number in the record.
- Email addresses when making the patron an SMS or VOICE patron
 - Don't remove emails in patron records when subscribing patrons to VOICE or SMS
 - Only remove the email if directed to do so by the patron
 - The Email field is used to send out notices other than holds and overdues
 - It is always a good idea to try to have an email in a patron's record
- Searching for SMS numbers in Workflows
 - View SMS Message Logs Wizard is under the Utility Toolbar in the SMS Notifications Group of Wizards.
 - To find a patron record using an SMS number
 - Use the gadget to select a date
 - If choosing a single date, select the day after the day you want.
 - Sort by clicking the column headers
 - Scroll down till you find the number
 - You can also go to File > Print screen to export the list into a different program like Excel
 - Information cannot be copied and pasted from the wizard

OUREG

- Property Settings
 - Modify User – check off “Profile modified/auto extend privilege”
 - This setting will extend the borrowing privilege on a record when the User Profile field is changed
- Changes to registration in Enterprise
 - “Help” link in Enterprise Login box
 - Patron is presented with more options than Online Registration
 - Online User Registrations are down 77% - since so many were created in error before, this is great news!

Accepting payment on lost items from other libraries

- Libraries cannot process payments for lost and damaged items borrowed from a different library.
- Place a note in the patron record and address the check to the owning library using the chart off of the staff site:
- The owning library pays the bill and removes the note

- Always remove notes when the issue has been addressed
- When adding a note always identify your library, your initials, and the date for the reference of staff at other libraries

Requests in Workflows

- Requests were a method for staff to communicate to patrons from Workflows to iBistro/eCatalog
- Requests don't work in Enterprise
- We are removing Requests from the Toolbar in Workflows
- If you have a custom toolbar that includes requests, the wizard will be password protected
- There is an email feature in Enterprise to replace Requests in the Catalog

Last Patron Request Policy

- SAILS can only provide the last two patrons prior to the current user displayed in Workflows upon request
- We can't go back further than 24 months

How to Print Charge History

- Display User Properties setting to show the Charge History tab
- Set Print settings to dump screen to excel
 - Print Setup
 - Application to Dump Screen click gadget
 - Navigate to desired program
- File > Print Screen
 - If a program is not specified in Application to Dump Screen it will default to a web browser
 - This may be desirable, but using a program like Excel will give you more control of the data

Bounced Emails

- Message come from Sirsi
- Read error message from Sirsi and address the issue with the patron
- Subscribe to different notice method if problem cannot be identified

Blurays and Standard DVD - cataloging and holds

- Holds are governed by Itemtype
- Itemtype of Bluray is now local holds only
- Combo packs are separated
- Do not override the system if a hold is not allowed
- If you believe the system is in error, report the problem to SAILS

Searching Enterprise - tips for staff and patrons

- “New and Popular” Searches
 - Links for premade searches on the left hand side of the Home Page
- Search suggestions
 - As you type in the search bar you will see other successful searches done at your library
 - Enterprise will match what you are typing letter by letter
- Facets
 - Allows patrons to explore the catalog without needing to perform multiple search
 - Left hand side of hit list
- Library Thing Content
 - Located on the item detail page
 - Social tags (read-a-likes)
 - Series information
 - Other Editions
 - Awards
- You can use RSS or bookmark the search results page in the browser to check for new books on your favorite topics