

## **SAILS Library Network**

### **Circulation Users Meeting**

**547 West Grove Street, Middleborough Massachusetts 02346**

**January 29th 2013**

**9:30 AM**

Libraries in Attendance: Denise Charland (Acushnet), Brian Avery (Attleboro), Ann Gerald (Bridgewater), Amy Sheperdson (Carver), Paula Sitarz and Sheri Torres (Dartmouth), Britt Grealish-Rust (Dighton), Marilyn Bastarache (East Bridgewater), Joan Roan (Easton), Rob Gonsalves (Fairhaven), Kimberly Silva, Conor Murray, and Betsy Washburn (Fall River), Kathy Harney and Vickie Kusleika (Foxboro), Jean Gallant (Halifax), Diane Brennan (Lakeville), Barbara Sheffield (Mansfield), Donna Ohlman (Marion), Carolyn Michaud (MMA), Melissa Guimont (Middleboro), Sarina Bluhm (Norfolk), Ellen Casaccio (North Attleboro), Debbie Clifton (Norton), Linda McCollum (Pembroke), Christine Champ and Kathy Keirstead (Plympton), Rebecca Hall (Raynham), Marjorie Bradley (Seekonk), Michelle Gagnon (Somerset), Sephi Alves and Marie Shea (Swansea), Robyn Bryant (Taunton), Patty Neal (Wareham), April McDermott (West Bridgewater), Joshua Brum (Westport), Nancy Daniels (Wrentham)

#### Introductions

#### OUREG

- Reviewed the OUREG process from start to finish
- Form filled out by the patron online. It is found on the OPAC login screen.
- The filled out form creates a temporary card in Workflow
- Patron has three weeks to visit the library and make the card permanent
- Staff must then update the Temporary Record when they visit the library
- Check for duplicate records first
- Got through the entire registration process to look for errors and to make sure the record has been completely updated
- Remember to change the OUREG profile and extend their privilege.

#### Updating SMS Patrons

- The three parts to activate SMS for a patron (Usercat 3, Phone1, SMS Tab)
- SMS won't send if Usercat 3 is not SMS or if the number in the SMS Tab is invalid (too long, too short)
- SMS Tab slowness issue

- We have contacted Sirsi. This function operates off of a different database and has different connections to the system. A side effect of this is the perceived slowness. There currently is no fix. You just have to be patient.

#### Emails in Patron Records

- The benefits of always having an email on file for a patron are that we send other notices via email that aren't sent by other means: Reminder notices, hold expiration notices, privilege expiration reminders, favorites, auto-PIN requests off of the catalog. Always keep an email in the record if a patron is interested in any of these notices.
- Usercat5 of NOFAVS turns off favorites notifications if patrons don't want these. We are trying to phase out Favorites since Enterprise doesn't support them.

#### Pending Transits Wizard

- It is located in either the In-Transit Items Group of Wizards or the Special Group of Wizard.
- It can replace the Items In-Transit Report. It shows everything that is in-transit and can be sorted so you can look at what is long overdue without needing to wait for the report to run.
  - To print from Excel:
  - Go to File > "Print Setup" in Workflows
  - In "Application to Dump Screen" use the gadget to navigate your computer and find the file Excel.exe
  - Should be C: > Program Files > Microsoft Office > Office11 > Excel.exe (the file path on your computer may be different)
  - Click Ok.
  - When you have the Pending Transits Wizard open, go to File > "Print Screen" to send to Excel

#### Forms and process

- Demonstrated the correct use of our forms on the Staff Site:  
<http://www.sailsinc.org/Forms/circ.asp>

#### Missing In-transit

- Contact SAILS if you get no response

#### Claims Returned

- This is an optional process. Not all libraries use this feature.
- Back date in the Claimed Return Wizard so the patron isn't delinquent
- The counter doesn't decrement itself. The count has to be decreased manually if need be via Modify User, on the Privilege tab

- Libraries that doesn't use Claimed Return can refuse the notice. The checkout library must mark the item as lost to bill the patron if directed to do so by the owning library. If a bill is generate it must come from the checkout library and not the owning library.

#### New way of printing bills

- 8 ½ x 11 - no more three part mailers
- We will be switching to use regular printer paper for bill notices. We no longer pay maintenance on the system printer, we are moving the SAILS offices, and the paper is expensive.
- The current Assumed Lost Report actually formats nicely into a mail-able notice, which we will begin using shortly instead of buying more three-part mailer paper.
- If you want to start using your assumed lost as a source of printing your own bills, SAILS has printer settings to get them formatted correctly. If these settings don't work, as long as we can log into the computer we can assist in the setup.
- If you get them working properly at your library, SAILS can stop printing your Bill notices as well.

#### Titles with 50 or more holds

- Staff site: <http://www.sailsinc.org/WeeklyHolds.asp>
- Patrons often place a hold on the 1st item they see, rather than the title with the most copies or one owned by their library
- Monitoring this list can aid in Collection Development and if you find a lot of holds from your patrons on a record with too few copies, you can touch base with your patrons to move these hold onto a title with more copies if possible.

#### Enterprise –demo

- Enterprise will eventually allow patrons to pay online. Will keep everyone informed and provide any needed training when we implement a solution
- February 11 is the roll out date for Enterprise
  - Start using Enterprise now so you'll be comfortable showing it to patrons. It also works better for searching.
  - If you find any errors or oddities, please report them to [support@sailsinc.org](mailto:support@sailsinc.org)

#### Overdrive Next Gen Catalog –demo

- This will hopefully go live around the same time as Enterprise
  - To play with another next gen site, go to <http://dlc.clevnet.org/>

#### Q & A

- Debby Conrad made an announcement that the Virtual Catalog is being replaced. The new system will have a 24 month roll out period. We are involved in the initial stage.
- Please don't send damaged items out to fill holds. Damaged items need to be pass back to the owning library not the next users with a hold.

- Once we move to smaller quarters, we will try to have these meeting out at different libraries since we will no longer have a meeting room.