SAILS Library Network

Circulation Users Meeting

9:30 a.m. – SAILS Headquarters - June 5, 2012

Notes

Libraries in attendance: Acushnet, Attleboro Public, Berkley Public, Bristol Community College, Carver, Dartmouth, Dighton, East Bridgewater Public , Easton, Fairhaven, Foxboro (Boyden), Freetown Libraries, Halifax, Hanson, Lakeville, Mansfield, Marion, Mattapoisett, Middleboro, New Bedford, Norfolk, North Attleboro, Norton, Pembroke, Plympton, Raynham, Rehoboth, Rochester, Seekonk Public Library, Somerset, Swansea, Taunton, West Bridgewater, Westport, Wrentham (Fiske)

Release 3.4.1

Printing Search Results – B. Phinney

With the new release you can now print an entire list of search results instead of just a screen at a time. Directions on how to do this were in the June newsletter.   It is also posted on the SAILS site at http://www.sailsinc.org/Tips/PrintingISD.pdf

Right Click Options – B. Phinney & L. Lessner

Ben did a quick demonstration of various methods of using the right click option as a short-cut to perform certain tasks in circulation. For example:

- Right click on a title in a patron's check-out list and you can renew the item, mark it lost, or mark it missing.

- Right click on a single or multiple items in a patron's hold list, select modify holds, and suspend hold.

- Right click on a title that is in a patron's check-out list and discharge the item.

Known issues – Place Hold ; Remove Item Hold - B. Phinney

If a patron does not have an alert in their record, staff members have to click on PLACE HOLD twice to place a hold. This is a known issue.

If a staff person uses REMOVE ITEM HOLD on a title with many holds there is a significant system delay. SAILS recommends that holds be removed from the user record rather than the item record.

General Reminders & Issues

- Items in Transit Wizard – D. Conrad

  There are still many items in transit from several years ago. It is recommended that libraries use the Items in Transit wizard to keep track of items in transit. Patrons holds are delayed if items remain in transit too long. Libraries may mark another library's copy MISSING IN TRANSIT if the owning library doesn't respond in a timely fashion. The owning library must be notified.

- Discarded Items with Bills & Holds (New Procedure) – D. Conrad

  SAILS is no longer going to be running the DISCARDED ITEMS WITH BILLS report. The reports took far too long and was causing system problems. Starting Friday, June 8, the CONVERT TO DISCARD PROCESS will not remove discarded items from the library's DISCARD patron if there are holds on the item. It is the library's responsibility to do something with those bills. Much discussion followed.

  SAILS has created two new BILL REASONS – DLOST AND DOVERDUE. DLOST is not associated with an item. The description is DISCARD ITEM SET TO LOST. If you want to remove a lost bill charge from a discarded item you may pay the bill and then bill the patron again using this bill reason. The title can be entered into the Extended Information field in the patron record. DOVERDUE is for DISCARD ITEM OVERDUE. As with the lost book charges, if a discarded item has overdue fines which the library wants to keep on patron record, pay the overdue charge and bill the patron for the overdue amount using DOVERDUE as the bill reason. The title can be entered into the Extended Information field in the patron record.

- Customized Policy Lists (****) – D. Conrad

  Not all libraries use the same patron profiles, especially for certain types of patrons. If you see **** in the patron profile it is not a system error. However if you are reregistering the patron as your own library's patron you can override this. NOTE: Taunton Public Library requires any patron who uses their public computers to acknowledge that they will follow the library's Internet Use Policy. The library uses Envisionware for managing patron reservations. They assign ADULTINT to adult patrons who have signed their policy. Many patrons from outside of Taunton use their public computers so your patron may be reassigned to ADULTINT. SAILS has changed the customized policy list for all public libraries so they will now see this patron profile.

- Patron Records – L. Lessner

  Online Registration – Patrons who register online for a temporary card are assigned the patron profile OUREG. The system isn't smart enough to do thorough duplicate checking so a patron could have an existing record in the system and then create an OUREG record. Libraries should update their patron's existing record and transfer holds to that permanent record and then the

OUREG record will automatically be deleted. Patrons may sometimes select YOUR LIBRARY ONLINE as a pickup location. If you get a request for an item with Online Library as the pickup location go into Modify Patron Holds and select the patron's home library as the pickup location.

- Replacing patron barcodes – if you are replacing the barcode for an OUREG patron or just replacing a barcode for an existing patron ask the patron if they have OVERDRIVE holds and email support@sailsinc.org with the patron's old barcode and new barcode. SAILS will contact Overdrive and request that the patron's holds be transferred to the new number.

- School members – delivery ending June 8. SAILS will make arrangements for items going to schools to be shipped to SAILS for the summer. Public Libraries are reminded school cards are not valid at public libraries.

Patron Notification

Overview – D. Conrad

SAILS will no longer be printing 3 part mailers for overdues. Public libraries have the option of participating in the Automated Voice service for holds and overdues. All public libraries are encouraged to offer their patrons the option of receiving notices via email or text message. Patrons will be asked to select how they want to receive notices. They may choose VOICE, SMS (text), EMAIL, or none. Their selection is identified in USERCAT3. All patrons will have their records flipped to UPDATE on June 11 and all libraries are asked to begin updating their patrons' records. Even if your library will not be participating in alternative methods of contact please update their records in case they use another library. Regardless of how patrons wish to be notified, the notice count in the patron record is updated.

Updating Patron Records – B. Phinney

Ben reviewed how to update your properties to view the SMS options and how to update patron records. The instructions will be emailed to libraries and will also be posted on the SAILS website.

SMS Notices

Patrons who have requested text messages will receive one message for holds and one message for overdues. They can't be combined into a single text because there is a limit of 160 characters per text message. The telephone number for the text message will be 508-506-1523

An overdue notice will read:

Do not reply. You have xx item(s) overdue at your library. <Name of Library> <library telephone number>

A hold notice will read:

Do not reply. You have XX hold(s) available at your library. <Name of Library> <library telephone number>

Voice Notices

Patrons who have requested telephone calls will receive a combined call for holds and/or overdues.

A sample message would be:

Welcome to the library's notification system. (this must be generic)

You have overdue items at the (checkout Library Name). Please call them at (checkout Library Phone #) if you have any questions.

>>If there are overdues at multiple libraries this will be repeated within the same message for each library.

You have one or more items on hold at the (pickup Library Name). You have (# of days based on the pickup library record) to pick these up. Please call the library at (pickup Library Phone #) if you no longer want your hold.

>>If there are available holds at multiple libraries this will be repeated within the same message for each library.

Thank you. Goodbye.

Project Timeline

> June 10th - Usercat 3 flipped to UPDATE

> June 11th – Libraries begin updating patron record

> July 1st – 2nd group of libraries move to Email, Voice and Text

Resources – L. Lessner and B. Phinney

- Poster for Circulation Desk – posters were handed out. Additional copies will be provided and posted on SAILS website

- Patron Form – Sample form was handed out. The document will be posted on the SAILS website.

- Online form – Laurie will send out the URL to libraries for the online form patrons can fill out to indicate their preferred method of contact. These forms will be emailed to the library's circulation contact.

- Press Release – Will be emailed to directors

- Recorded training – Will be posted on the SAILS website

- Onsite Training – SAILS staff can conduct onsite training if several libraries can meet in one place.

Questions

WILL REMINDER NOTICES BE SENT OUT VIA TEXT OR PHONE CALL?

No, reminder notices and notices that holds have expired on the hold shelf will only be sent via email. Even if a patron has a phone number or SMS number in their record if they continue to have a valid email address in their record they will receive these notices.

CAN MY LIBRARY OPT INTO VOICE NOTIFICATION AT A LATER DATE?

Yes. There is no fee for this service so a library can decide later that they want to use the Automated Calling service for holds or overdues or Holds and overdues, or overdues only.

Dates for FY13 Meetings

- Fall Roundtable – October 25 – Westport Public Library

- January network wide meeting – January 22 (January 29 snow date)

- Spring Roundtable – March 28 – Norton Public Library

- June network wide meeting - June 4th.