

Circulation Roundtable 3/27/2012

Location: Mansfield Public Library

### Meeting Minutes

Libraries in attendance: April McDermott (West Bridgewater), Molly Klenowski (Norton), Britt Grealish-Rust (Dighton), Joan Roan (Easton), Vickie Kusleika (Foxboro), Sephi Alves (Swansea), Marie Shea (Swansea), Diane Brennan (Lakeville), Ann Gerald (Bridgewater), Linda McCollum (Pembroke), Nancy Daniels (Wrentham), Ellen Casaccio (North Attleboro), Janet Campbell (Mansfield), Barbara Sheffield (Mansfield), Evelyn Hernandez (Attleboro), Sarina Bluhm (Norfolk)

- I. Opened the discussion up to general question regarding the new release to Workflows
  - a. The policy regarding the Unfill Holds Button is to not use it at all. Have it unchecked in the wizard properties so it doesn't even appear.
  - b. The Afternoon RHA will still be run. The only difference is that it will now be comprehensive like the Early Morning and Evening Lists.
  - c. Some felt the new holds wizard seemed redundant.
    - i. The new wizard is intended to streamline the work process and give an additional access point to the holds list
    - ii. It can be set to dynamic which would be different. But we are holding off on making it dynamic. It could potentially use too much server power to run causing a lot of other processes to slow down.
  - d. A concern was raised as whether the Right-Click feature will allow staff to perform actions that they do not have access to, like entering Circ Notes.
    - i. Right-Clicking doesn't alter the permissions allowed by a log in. If you don't have access to a feature being able to right-click won't change anything. It just gives quicker access to actions you are allowed to perform.
  - e. The Upgrade will hopefully be done on the server by the time everyone comes in on Tuesday (4/3/2012)
    - i. If Workflows prompts you to upgrade you should be all set to update your clients
    - ii. We will also send out an email when everything is all ready to go.
    - iii. Updating a workstation should only take a few minutes. 15-20 at most.
    - iv. Deep Freeze or Steady State needs to be deactivated, if you use it, in order to make the change permanent.
  - f. If you have local toolbars on a workstation, the upgrade will turn them on. This could be confusing if you didn't know they were there. You can look to see if you have them beforehand using one of these methods:
    - i. On your PC, go to Documents and Settings > Workflows > Toolbars > Toolslocal
    - ii. In Workflows, the Utilities Module > Toolbar Management Wizard
- II. A question was asked as to whether Barcodes need to be on the outside of items now.

- a. All new items should have barcodes on the outside to facilitate scanning through delivery.
  - b. This is more of an MLS issue rather than SAILS. It would a good idea as this question of them.
- III. An issue was brought up that Circ staff needs to be more mindful of items when checking them in. Items are checked in frequently that are damaged and missing items.
- IV. A problem with the quality of the MLS delivery bins was discussed.
  - a. MLS would of course need to made aware of any issues with the quality of their bins.
- V. If a patron changes their barcode, for any reason, we need to made aware so that we can merge their Overdrive accounts if they have holds, etc...
  - a. It is possible that this same issue could occur with the VirtualCat. But, rarely ever does.
- VI. Transferring to kindle via USB
  - a. The USB process can be confusing for patrons.
  - b. Amazon has instructions that are pretty good if you need them.
  - c. Use the Help feature on Overdrive to get patrons started. Often times they are having problem because they need step by step instructions.
  - d. We've recommending kindle app users to use to Overdrive Media Console App instead. Epubs don't have the same publisher restrictions as kindle titles.
  - e. The new website has a portion devoted to the issues we are facing with ebooks and publishers.
  - f. Don't be afraid to inform patrons of this issue.
- VII. Can limited patron profiles have limited number of checkouts?
  - a. Yes.
  - b. Can it be limited further by itemtype?
  - c. Yes. But the exceptions need to be made item by item.
- VIII. Patron Notification Project
  - a. Patrons will have to opt-in to the service. We are creating a form to have available for them to fill out and indicate which method is their preferred method of contact.
  - b. It is of course possible for patrons to be notified for items that have already been checked out. But, this happens already with some patrons who get email notices.
  - c. Libraries can choose to use the method of notification they want, if what they are currently do works fine for them.
  - d. The point of this project is to stop printing mailer notices that are expensive, take several days to reach the patron, and can't be read when they reach their destination.
  - e. Usercat3 is going to be activated and changed so that it can be used to indicate how to contact each patron.
  - f. The choices will be: SMS, Email, Call, None
  - g. There will eventually be detailed instructions on how to use this contact method.
- IX. The new SAILS public site is live.
- X. The Notification project might be a good opportunity to for customer service training with staff since we'll be doing a little retraining anyways.

- XI. Vertical Response is a free email service we use, if anyone is interested in a email service for patron outreach.
- XII. System should be ignoring notices that say undeliverable in the address field.
  - a. If they are still being printed let us know so we can address the problem.
- XIII. Holds
  - a. Should look at the patrons' library when assigning holds in the queue.
  - b. It can happen that holds placed at a library's OPAC may been seen as the OPAC library not the home library on the patron's record. The new release should fix this problem.
- XIV. Open discussion of who circulates ereaders and how.