SAILS Circulation Users Meeting 1/10/2012

Libraries in attendance

Acushnet	Easton	Middleboro	Rochester
Attleboro	Fall River	New Bedford	Seekonk
Bridgewater	Foxboro	Norfolk	Somerset
Dartmouth	Halifax	North Attleboro	Swansea
Libraries	Mansfield	Norton	Taunton
Dighton	Marion	Pembroke	Wareham
East Bridgewater	Mass Maritime	Plainville	West Bridgewater

E-Catalog

1) Demonstrated patron view from home
2) Briefly explained the OUREG process
3) Most information is still the same
4) What's new
   a) Holds can be placed from the Hit List screen
   b) Removal of the owning library language from hit list screen
      i) This caused patron confusion
      ii) Item Details will show owning library information
   c) Icons have been changed to be clearer
   d) Reviews from LibraryThing have been added
      i) Titles are collapsed so different formats won't separate reviews (dvd/blu-ray, different isbns, etc)
      ii) Reviews come from SAILS, other libraries, and LibraryThing
         (1) They are vetted
         (2) Staff can review items as well, though they will carry the same weight as a patron review
         (3) All reviews from SAILS are vetted by us and follow our review policy
   e) My List lets you set up lists of books separate from your holds list
      i) The "active" list shows
      ii) Holds cannot be placed from this list
      iii) Bibliographies can be generated from this list
   f) You can now generate links to pages
   g) Accelerated Reader information has been moved to the detailed display to avoid confusion
   h) Records now contain social tagging
   i) Series button shows other titles in a series
      i) Titles we don't own will appear without a link to an item record
   j) Awards and Similar Books content also comes from LibraryThing and can be used for reader's advisory
   k) The record also has an Add This feature to post to social media
5) The addition of this content was in response to the patron survey we put out last spring
6) Statistics show that people are spending much more time browsing the site than before
   a) IE 5/6 or lower still won't work. All other issues should be resolved.
7) Patron are notified weekly of any selections they've made regarding My Favorites

a) We have no control over the system notifying them regarding items they might not have access to or items they might be notified for repeatedly due to additional formats being added to the system.
b) This weekly email could confuse some patron who don't read their email into thinking that they may have a hold available
c) Patrons edit the parameter of this feature, not us

Overdrive

1) Don't give patrons our (SAILS) phone
   a) We have a form for them to fill out on the website if they have a problem
   b) Patron support needs to go through the library, not SAILS
   c) The Overdrive site has tools to help patrons walk through the processes. Direct them to these.
2) Some publishers don't allow libraries to purchase titles
   a) We have absolutely no control over this
   b) It is often best sellers
   c) Sometimes publishers stop allowing us to purchase titles. So we might buy one copy, then the publisher changes their mind and we can't buy more to fill the growing holds list
3) If there is a title a patron wants, let us know. We may be able to purchase it. Chances are if one person wants it, someone else in the network does too.
4) Patrons may be surprised by our collection size
   a) They need keep in mind that we have a limited budget
   b) And, we are charged more than the public for these titles
   c) We add titles every week and are doing the best we can to keep up with the demand
   d) Just like everything else, it is One Copy One User
5) The patron's barcode prefix allows access if a library has an Advantage collection
6) Publishers won't allow eAudio books to be returned early
7) If a patron checks out the wrong format, the title cannot be easily switch
   a) We need to be notified
   b) The title has to be returned and a new hold needs to be made with the correct format
   c) We have to notify Overdrive to have the hold moved to the top of the list if possible
8) Demand has skyrocketed, which is why not much is readily available
   a) The holds list isn't too long so the wait time isn't bad
   b) Patron's should be encouraged to place holds because it allows us to see which titles have the most demand and purchase additional title accordingly
9) MyHelp Beta is where you should send patron's first if they are having issues.
   a) It walks through the basic process
   b) Also contains an FAQ located under "Questions"
   c) Overdrive help pages can be confusing; the MyHelp Beta is interactive and clearer.
10) You can show patrons this site and explain the process
    a) DRM prevents us from downloading the material at the library to demonstrate
    b) Usually a patron just needs to get through the process once
    c) Show the patron the list of recommended devices if they have questions about which to purchase
    d) There are webinars available from Overdrive to help train your staff
11) BuyItNow, patron purchases a title and we get a portion of the proceeds
12) The Support Tab has a link to form to be filled out if they have troubles

WorkFlows 3.4.1

1) New Release
   a) We haven't done a new release for around 2 years
   b) Last release was too buggy to adopt
2) Functionality will be similar. It will be visually different.
   a) Will operate more like windows with tabs and right-clicking
3) RHA errors will be fixed
   a) Supposed to support on demand reports
   b) We will need to test this
4) Holds issues should be solved too
   a) The issue of items that are supposed to be available but are not on the shelf should be solved
5) Cash Reports
   a) Floating station issue will be solved
   b) More accurate results
6) Should support an SMS option alongside email
7) Item group user editor should be available
   a) Makes temporary collections and displays easier to manage
8) No install date
   a) If we go ahead with it, we will offer webinars to train staff

Mobile App

1) This is for Library accounts, not Overdrive
2) It is called BookMyne and it's free
   a) Works with Android and Apple
   b) Links to Goodreads
   c) Patrons can manage their account, search catalog, and place holds
   d) List will appear as well
   e) Official launch is this month
   f) Details will be coming
3) The new catalog also has a mobile stylesheet

Workflows Searching Review

1) Go into Item Search and Display
   a) The Helper "search options" is like advanced searching
      i) It uses cat codes and not eCatalog language
2) Clicking tabs will sort your results lists (minus the description tab)
3) Windows can be manipulated for better viewing
4) Lock icon indicates that an item has holds
5) LP editions often get more holds
   a) Acq records don't indicate that title is LP
   b) LP titles are often newer and appear first on the hit list
6) Boolean must search using the Keyword function
7) There is also an advanced searching helper that assists with Boolean operators
8) Formats can be used as search terms
9) For Truncation use $
10) For substitutions use ?

Network Policies

1) Bookclubs
    a) Don't do multiple holds on Bestsellers
    b) Can't be every copy in the system
    c) Must follow network policies
    d) Virtual bookclubs are a new trend that could be explored
2) Out of state borrowers
    a) Every library in MA must offer any MA residents a card
    b) This doesn't extend to out of state borrowers
    c) We have a policy in place to deal with this
        i) It is a library's choice whether or not to offer out of state patrons a card
        ii) There is a minimum fee of $55 for this card per family per year
        iii) If you choose not to charge this minimum fee, the patron must have a unique patron profile that restricts them to just that library
        iv) If you work or are a student in MA this is a different situation, this is for people who live out of state and just want a MA card for whatever reason
        v) Visitor profile can be assigned to people who are only working in the state temporarily
        vi) The NOMASS fee is good for an entire family
        vii) It might be a good idea to assign people with provisional addresses a limited profile like Visitor so their address can be checked periodically
3) Dual Cards
    a) If a person wants to use a different library's services that aren't offered network wide. The home library needs to be updated in their record.
    b) No one should have two cards
    c) It is one public library card per person
    d) Students and faculty are restricted to their school so these aren't public library cards
4) Missing In-transit form
    a) If submitting multiple forms, hitting the back button may save your info
5) Phone app barcodes
    a) A more expensive multi-line scanner is needed