

## **SAILS Library Network**

### **Circulation Users Meeting**

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

**June 4<sup>th</sup> 2013**

**9:30 AM**

**Libraries in Attendance:** Denise Charland (Acushnet), Brian Avery (Attleboro), Carla Paiva (Berkley), Ann Gerald (Bridgewater), Patricia Martin (Carver), Sheri Torres (Dartmouth Libraries), Britt Grealish-Rust (Dighton), Marilyn Bastarache (East Bridgewater), Joan Roan (Easton), Rob Gonsalves (Fairhaven), Vickie Kuslieka (Foxboro), Donald Colon (Hanson), Diane Brennan (Lakeville), Barbara Sheffield (Mansfield), Joseph Fernandes (New Bedford Libraries), Sarina Bluhm (Norfolk), Ellen Casaccio (North Attleboro), Debbie Clifton (Norton), Linda McCollum & Darlene O'Connell (Pembroke), Paul Cutler (Plainville), Christine Champ (Plympton), Rebecca Hall (Raynham), Jen Frasier (Rochester), Marjorie Bradley (Seekonk), Michelle Gagnon (Somerset), Marie Shea & Sephi Alves (Swansea), Robyn Bryant (Taunton), Josie Scott (Wareham), April McDermott (West Bridgewater), Josh Brum & Jane Young (Westport).

#### **Workflows 3.4.1 Service Pack 3**

- There is no training on new features required in this release. It is primarily bug fixes only. The only Circulation bug documented that seemed like something staff would have encountered is an issue where the Trap Holds Wizard didn't print a hold slip on the first scan. This has been fixed but none present had encountered the issue.
- There is one issue with this release that staff should be aware of. The Clean Holds Shelf Report will sometimes have duplicate entries for items coming off the shelf. It seems to happen when an item is being put in transit to fill a hold at a different library. SAILS has been able to recreate this issue on our test server. It should only be a minor nuisance.
- SAILS will be updating the server 6/5/2013 in the morning. Unless there is an unexpected problem it should be ready before you come in to open the library in the morning.
- Updating is the same process only the visual prompts will be different. After this release, workstations will no longer require an admin login on the pc to perform a client update.

## Changes to your VPN Client

- If you are a library that uses a vpn to connect to SAILS, you need to update your vpn clients. If you don't know if you are, then you most likely are not.
- Process:
  1. Close Workflows and Open the VPN
  2. Click the Disconnect button
  3. Below the button should be a list of connection entries (you may see only one)
  4. Click the connection entry for your location (they usually say something like: SAILS VPN– MMA) and it should turn blue
  5. Right-click it and select Modify
  6. A pop-up window should appear. Three lines down it should say Host followed by an IP address
  7. Replace the IP with **vpn.sailsinc.org**
  8. Click Save and then Reconnect and you should be all set.
- We need to do this because the current address points to a physical location. We will be moving our servers into the cloud and this will change the address. The new address “vpn.sailsinc.org” is a url that we can change the location it points to without affecting your connection.
- Do this ASAP so it is fresh in your memory. Once this is done you won't need to worry about it when we move to SaaS. Send [eservices@sailsinc.org](mailto:eservices@sailsinc.org) an email when it is complete.

## MobileCirc

- We have only had available a workaround to get Workflows running on a mobile device. Now Sirsi has a mobile product to address this need. This is an actual mobile app version of Workflows. It will also run off of an html5 web page so that it can be device agnostic. It can perform basic circ functions as well as inventory, weeding, and the functions of the Onshelf Items Wizard.
- It should be available in the coming months. The latest timeline from Sirsi puts it around Quarter 1 of FY14. SAILS will test this when it is available and advertise it. It has been described as “affordable.”

### **Personal Information Tab in Enterprise**

- When logging into Enterprise for the first time, accounts default to view their Personal Information tab in My Account. This creates confusion because the first thing a patron sees is the option to change the PIN. This is not required. Nor can we change this default. We have talked to Sirsi and this cannot be changed at this time.
- This is only a system default; the patron can change this in their Preferences under Personal Information. They can chose to view either Checkouts, Holds, or Bills instead. If asked, instruct patrons on how to do this.

### **Credit Card payment option**

- We will be using a product called SmartPay from Comprise to offer patrons a credit card payment option. It will be offered to libraries that wish to purchase this service for their patrons. It doesn't integrate into Enterprise so patrons have to go to a separate portal.
- Only bills from participating libraries can be paid. It is important that staff know they cannot handle a patron's credit card. We are only licensed to offer this as a self-service option. It si illegal to do otherwise. Libraries should have a payment terminal available for patrons, but patrons must be the ones handle their cards and entering their information.
- Marketing will be very important as patrons are used to libraries not being able to process credit card payments.
- Norfolk and Lakeville are currently testing the service. Debby Conrad needs to discuss this with the board to determine when we will start turning other libraries on.

### **Committee for Responsible Cataloging**

- Cataloging policies designed to adapt cataloging procedures to be more customer service oriented. Policies aren't retroactive.
- Blu-Ray Combo packs: must be separated and Blu-Ray copies are local holds only
- DVD Sets must correctly use the subfield Z in the call number. Holds placed in Workflows must be placed on copies using the desired subfield Z. If it is unclear use the OPAC.
- Audiobooks with the same narrator and disc number will be on the same record
- Paperback fiction books will all be on the same record

- Hardcover fiction books will all be on the same record

### **Placing the Correct Holds in Workflows**

- When in Workflows, pay close attention to the call number. Holds will only be placed on items with similar subfield Zs. For example, if you want the full set of a DVD series you must select items with “FULL SET” following the call number. The call number field in the item detail panel will show this more clearly as “|ZFULL SET.” The OPAC lumps Volumes together when placing holds, which is why using the OPAC can be clearer.

### **Workflows Codes**

- Item Type – the primary purpose of the item type is to define how an item circulates and to whom it may circulate.
- Home Location – Where the item is shelved
- Item Category 1 – Statistical Categories (library defined)
- Item Category 2 – Age demographics (network defined)
- Library (Library in Basic Tab) – the Library that is generally the library the patron received the card from. Specifically, this is library indicated in their Home Library field. *This is the patron’s Home Library.*
- User Category 1 - statistical category (library defined)
- User Category 2 – For public libraries this is where the patron resides (network defined)
- Patron Profile – Sets the privileges for the patron

### **FY 2014 Meetings and Locations**

- This is the last meeting to be held at the SAILS meeting room. Our new location doesn’t have a big enough meeting room to hold large meetings. We will be going out to the libraries for most meetings now instead of just the Round Tables.
- Lakeville, Pembroke, Seekonk, Norfolk, and Wareham have all offered the use of their meeting rooms for next Fiscal Year. We will be in touch once we have next year’s meetings scheduled.

## **Out of State Patron Policy**

A question came up about this issue. Just to reiterate, this is the policy:

Libraries may choose whether or not to issue library cards to out-of-state borrowers.

- People who attend schools in Massachusetts or work in Massachusetts should be issued a standard SAILS card. They are not required to pay for a card.
- Cards are only good for 12 months
- The network shall establish a minimum annual fee for a card for out-of-state borrowers. The minimum fee is charged per family.
- Any borrower that purchases an out of state card at the network minimum shall have access to all the network resources.
- **Cards purchased below the network minimum are only valid at the library that issues the card.**
- **SAILS will provide libraries the issue restricted out-of state borrower cards with a profile that will restrict the patrons to that library only.**
- Libraries may choose to issue in-state cards to out-of-state residents who work in the town.