

## Circulation Roundtable

### Meeting Notes

October 25, 2011

- Overview of e-catalog - pin requests, email updates, my lists, my account features
  - Laurie is conducting webinars on October 26 and October 27<sup>th</sup> to introduce staff to the new features. Open to all staff. A recorded intro will be available soon.
  - Libraries will be receiving promotional material in delivery beginning this week.
- Voice notification –
  - Committee is looking into this as well as an incoming call service.
  - We are inviting circulation contacts to forward questions to [dconrad@sailsinc.org](mailto:dconrad@sailsinc.org) so we can get answers from the vendors we are looking at.
  - Won't happen until July 2012
  - Library elf is a great alternative for people who want a text message or want to combine multiple accounts
- Review of network policies –
  - LOSTCARD patrons – libraries have the option of using the LostCard wizard to indicate that a barcode is lost (inactive). The record stays in the system but the patron profile is LOSTCARD. These aren't considered duplicate records. SAILS plans on removing old LOSTCARD patrons in the near future.
  - Missing in transit – email [support@sailsinc.org](mailto:support@sailsinc.org) if you have waited more than a week for a missing in transit report.
  - Claimed returned – libraries may set items to Claimed Return. If the item belongs to another library the circulating library must use the Claimed Return form on the SAILS site to notify the owning library. <http://www.sailsinc.org/Forms/circ.asp>
  - The owning library may choose not to allow the item to be set to claimed return
  - Teacher Cards – bright yellow cards issued to teachers so that they can borrow materials for an extended period of time. Only good for print materials, must be curriculum based, and only valid at the issuing library. May not be used for general checkouts.
  - Out of state patrons – SAILS has set a minimum amount a library must charge for an out of state patron to be able to use all the network libraries. Exceptions to this policy are people who work in Massachusetts, go to school in Massachusetts, or own property in Massachusetts. If a library chooses not to charge for out of state cards they must register the user with a unique patron profile that prevents them from using other libraries in the network.
- Reporting errors using SAILS forms – using the forms provides the SAILS staff with the information they need to promptly respond to your request
  - Last Patron – use this form <http://www.sailsinc.org/Forms/WorkflowsRequest.asp>
  - General errors – use this form <http://www.sailsinc.org/forms/circ-errorform.asp>
- SAILS Wiki
  - There is now a wiki for the network to use.
  - Main purpose is to share internal information only.

- Every library has their own profile page to edit and populate with information regarding the services at their library.
  - Contact [support@sailsinc.org](mailto:support@sailsinc.org) to gain access.
- Training new staff – SAILS can provide onsite or web based training to new circulation staff on how to use Workflows.
- Online help file – Click on HELP if you have a problem with Workflows. The Context help will be specific to the wizard you are in. There is also a keyword search option.
- We are currently Beta Testing mobile apps that will search the catalog, allow patrons to place holds, and view account information.
- Overdrive now works with the kindle. Anyone with an Amazon account can download a free kindle app to try out the service.
- If patrons are getting Hold notices for items that aren't on the holds self.
  - Human error
  - Either patron didn't read the entire email and misunderstood the notice.
  - Or, person processing the item didn't place the item in-transit correctly in Workflows.
- Holds
  - It is good customer service to extend the available hold expiration date for a few days if there is a good reason the patron can't make it in to the library in time.
  - Patrons will receive a notice 30 days before a hold expires. (Holds remain in the system 365 days)
  - If a patron's hold gets cancelled accidentally, place the hold again and make them #1 on the list.