

## Governing Council Meeting Minutes

### 5/18/2018 – Whitney Point & GoTo Meeting

#### **Announcements:**

This is Ed Dunscombe's (Endicott) last meeting as he is retiring in June. The library has hired Seth Jacobus to take over. He will start soon.

The group also welcomed Mindy Baker, new director at Worcester.

**Old Business:** Whitney Point still experiencing issues with workflows transactions disappearing. The next step in troubleshooting is for 4cls to provide a loaner pc for circulation to see if the error continues.

**Text Messaging:** Greene & Endicott are currently using text messaging to send hold pickup notices (from a pilot program begun in 2012). Patrons must opt-in and supply cell phone information to staff who add the information to the patron account.

There is no way to know how many patrons have opted in.

There is no way for staff to determine if a patron got a text (and doesn't need a phone call) Norwich, Oneonta, Oxford, and Whitney Point are interested in joining. From the 2012 trial we still have thousands of messages we can send.

For overdues, texts are sent based upon the charging library.

For Hold Pickup notices, texts are sent based on the Pickup library.

In the future, messages will cost \$600 for 5,000 or \$1,000 for 10,000, but will expire after one year. Jeff will receive reports to track how quickly the messages are being used.

Anyone interested in adding this service should e-mail [automation@4cls.org](mailto:automation@4cls.org).

After more libraries start using the service, 4cls will develop one or more pricing structures for consideration.

Going forward- there will be an option to allow patrons to opt-in to receiving text messages through the 'my account' page in the catalog. It will be up to Governing Council whether or not that option is enabled.

**Automatic Renewal:** 4CLS has purchased the auto-renewal report (\$700). It will be installed (but not turned on) May 24. This is a library opt-in that automatically renews eligible materials for patrons. To opt-in send an e-mail to [automation@4cls.org](mailto:automation@4cls.org).

Items will not be renewed if they have fines or holds attached. The report will also follow library policy re: allowed number of renewals.

Pros & Cons:

- Most patrons really like it
- Might increase circulation

- Might reduce overdue fine collection
- Patrons are only notified that items were renewed by e-mail
- Some patrons might be upset that not all items can be renewed automatically

A GoTo Meeting meeting will be held in June to go over the options. 4CLS will notify Governing Council of the libraries that opt-in as that could be a consideration for neighboring libraries.

**Automating/Barcoding Update:** Gilbertsville went online May 8. Smyrna & Unadilla are nearing the end of barcoding. Andes just started (April 30). Edmeston will start soon. We have a signed contract from Roxbury. Steve has visited several of the other libraries will be contacting the remaining libraries on the near future.

**Symphony Security:** After the next upgrade (end of June) 4cls can create a policy for workflows logins to make them more secure.

**Symphony Upgrade:** A Symphony upgrade will be installed in the middle of June. The upgrade will fix the problem of deleted holds not going to the next user. See the attachment for some possible enhancements. The date will be confirmed before the update is installed. All machines using workflows will have to be updated the following day.

**Enterprise (web catalog) Update:** Enterprise, the web catalog, will be updated by Sirsi in July. The update should make it work better with mobile devices.

Note: doing an empty search returns all of the items in the catalog. If you then filter by library you can see everything a particular library has in the online catalog.

**Kids Catalog:** Sirsi has a catalog interface designed for kids. The cost is a one-time fee of \$1,800. Jeff showed a limited demo. It uses keyword searching. Group consensus is to wait for another customer to adopt it and see how it works for them.

**Enterprise Details Tab Display:** A free item from Sirsi, this update allows for the summary, review, etc. info on an item display screen to be displayed in tabs across the top rather than expandable sections below. It will be installed May 30 on a test page first to see if people like it. There is also an expensive (\$2400) display option called Bento Box. No current plans to add it.

**Buy It Now:** At one time, Sirsi had an arrangement with Amazon for a program called But It Now. Through the program, 'Buy it Now' buttons were added to the catalog that made it easy for patrons to purchase items through Amazon. 4cls received 4% of the cost of each item purchased if 4cls used it to purchase modules from Sirsi- if not purchased through Sirsi then we would receive 2%. Last year, Amazon ended the program suddenly and without notice. Now, Sirsi has announced it is bringing the program back with Baker & Taylor. No details are available yet.

**E-Rate Update:** Sherburne and Greene have fiber. Norwich fiber is being installed today, and Oxford on Monday. We are working on BCPL too. 4CLS is working with First Light.

**Shared Storage:** 4CLS is setting up with Southern Tier Library System for disaster recovery (we each back up the other and in dire situation can run one system from another's location). It is expected to be up by the end of June. We do not expect service interruptions with workflows. Libraries running wordpress for their websites may experience some down time.

Notification will be provided as the date nears.

#### **General Discussion:**

JC is going (overdue) fine free for juvenile materials. There are technical things that must be done with circ rules to encode this in the system. For now, they are just using the fine free discharge wizard when discharging juvenile materials. Norwich has also been removing overdue fines for their juvenile materials.

A wide ranging discussion occurred. In most cases, it is not a child's fault that materials are returned late. Those fines then prevent the child from using the library. There is a growing trend across the country of libraries removing fines for children.

There are two ways to do this, either by creating a fine free user profile or creating a fine free item type. The discussion seemed to be agreeable to those in attendance.

It will be much easier for 4cls to set up circ rules once, rather than create many individual circ rules. Further information will be collected about the set up and the financial impact to the libraries. That information will be distributed over the summer with a goal of having a further discussion (and perhaps a policy vote) at the August governing council meeting.

4CLS Day of Discovery is June 13 at 4CLS. Join us for a day of updates from the various 4cls departments. There will also be stroll around time to meet and greet 4cls staff. More information to follow.

#### **Attendance:**

##### **In Person:**

Steve Bachman, 4CLS  
Trudy Fisher, Fenton  
Korin Spencer, Fenton  
Robin Avolio, South New Berlin  
Emily Creo, 4CLS  
Sarah Reid, 4CLS  
Sherry Kowalski, BCPL  
Brian Lee, 4CLS  
Ed Dunscombe, Endicott  
Stephanie Champney, Whitney Point  
Ben Lainhart, JC  
Deb Stever, Deposit  
Pat Parks, Stamford  
Connie Dalrymple, Norwich  
Mindy Baker, Worcester  
Tina Winstead, Oneonta

##### **Online:**

Clara Lantz, Smyrna  
Echo Weller, Springfield  
Lisa Wise, BCPL  
Kaitlyn Forbes, Richfield Springs  
Claire Ottman, Cherry Valley (& Cooperstown)  
Ramona Bogart, Afton  
Susan Frisbee, Walton  
Susan Rowe, Gilbertsville





Search



Jeffrey Henry | Logout | FEEDBACK

Home

Products

Cases

Documents

Training

Community

Downloads

Services

Account

Home &gt; Automatic Renewal Report

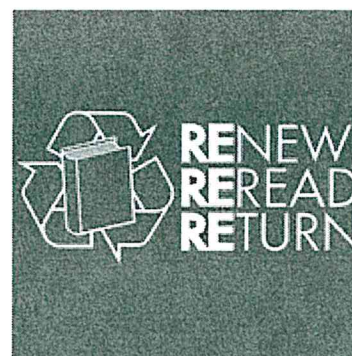
## Automatic Renewal Report

Save the time of the reader! Our Automatic Renewal Report renews checked-out items that do not have pending holds. You get the circulation credit, patrons get more time to spend with the materials they love.

SirsiDynix Consulting Services will deliver a report to automatically renew material checked out. The report will run daily to find any items that are due that day. The report will consider selection criteria by staff. For the items selected and are due that day, the items will be automatically renewed. The Renew Item transaction will be run against the items. So the automatic renewal date will be applied.

The report will not renew items that have exceeded the renewal limit (seen or unseen) or items with holds.

The report will send an automatic email notice to patrons indicating the renewal occurred. If an item is not renewed, nothing will occur. The patron will not receive a notice.



"COURTESY RENEWAL NOTICE"

The following material has been automatically renewed for you. If item(s) due today are not shown, they did not auto-renew because: 1) there is a waiting list; or 2) the item has reached its renewal limit; or 3) belongs to a collection that does not allow renewals.

## Automatic Renewal Questions

1. How long have you been using this feature?

The San Diego Public Library (36 locations) went live with automatic renewals in November, 2017.

2. Were there any problems during the initial setup?

None at all.

3. How have the patrons reacted?

Generally favorably. There is a small but vocal contingent of patron complaints that I'll explain under 6 below.

4. How have the staff members reacted?

It has reduced the number of phone renewals, which they appreciate. However, they now find themselves queried by patrons as to why not all of their checkouts renewed, and the answer may not be obvious.

5. Any pros?

We have demonstrably fewer overdue fines, and that in aggregate makes for happier patrons and staff.

6. Any cons?

There are two issues we have encountered with the autorenewal report. First, it does not list items that could not be renewed (due to holds, reaching the maximum renewal threshold, etc.). Almost from day one, patrons and staff started asking for this. We may inquire about additional custom work to see if this feature can be added. At the moment, we have language in the autorenewal notices warning patrons that not all items may have renewed and they should check their accounts, but they still complain. Which brings me to the second issue: some patrons will interpret automatic renewals as a signal that they are no longer responsible for their checkouts. From their perspective, everything should always automatically renew, and if something doesn't renew the library should contact them about it.

7. Do you have any PR material you could share?

We only placed a notice on the catalog announcing the new feature, and I think even that was too much publicity. I had initially envisaged autorenewals as an unexpected favor done by the library for patrons who had forgotten their items' due dates. I think a lot of patrons *do* perceive automatic renewals this way, and we do get thank-you notes from patrons for the service. But by announcing automatic renewals—even with all the caveats about holds and renewal limits—an impression was created in the minds of some patrons that they no longer had to keep track of their due dates.

### **Symphony Enhancements 3.5.3**

#### **UNI-38429 Maximum number of checkouts across all libraries**

A new attribute, "Maximum Charges applies to all checkouts using this circulation rule", was added to the Circulation Rule policy. This attribute allows multiple Item Type policies to share a common Maximum Charges value, which allows libraries to limit the number of checkouts across all applicable item types to one value instead of using a separate Maximum Charges value for each item type. For more information about this attribute, see the "Circulation Rule Wizard" of the WorkFlows Online Help.

#### **UNI-39322 Limits for checkouts of the same item type across all libraries**

A new attribute, "Limit number of checkouts for this item type across all libraries", was added to the Item Type policy. This attribute allows administrators to place a limit on the number of checkouts a patron is allowed for items of a particular item type across all libraries in the library system. For more information, see the "Item Type Wizard" topic of the WorkFlows Online Help.

#### **UNI-37818 Item Type, Location, and Library policy descriptions display within Checkout, Discharging and Item Search & Display wizards**

For library systems that have the policy description display feature enabled, policy descriptions now display in the place of policy names for fields that show Item Type, Location, and Library policy values within the Checkout, Discharging/Checkin, and Item Search and Display wizards. For library systems that have the feature enabled, policy descriptions will display automatically for fields that use the aforementioned policies (for example, Current Location and Home Location) within these wizards after the SirsiDynix Symphony upgrade. If your library is interested in having policy descriptions display in the place of policy names within the WorkFlows client, contact SirsiDynix Customer Support.

### **FIXED BUGS Symphony 3.5.3**

#### **UNI-39210 Removing an available hold using the Remove Item Holds wizard does not make the next user's hold available**

On library systems using SirsiDynix Symphony 3.5.2 Service Pack 1, if a staff user removed a hold from an item using the Remove Item Holds wizard, Symphony did not make that item available to the next patron in the hold queue. This has been fixed so that when a staff user removes a hold from an item using the Remove Item Holds wizard, Symphony makes that item available to the next patron in the hold queue as expected.





Search



Jeffrey Henry | Logout | FEEDBACK

Home

Products

Cases

Documents

Training

Community

Downloads

Services

Account

Home &gt; Enterprise Kids Catalog

## Enterprise Kids Catalog

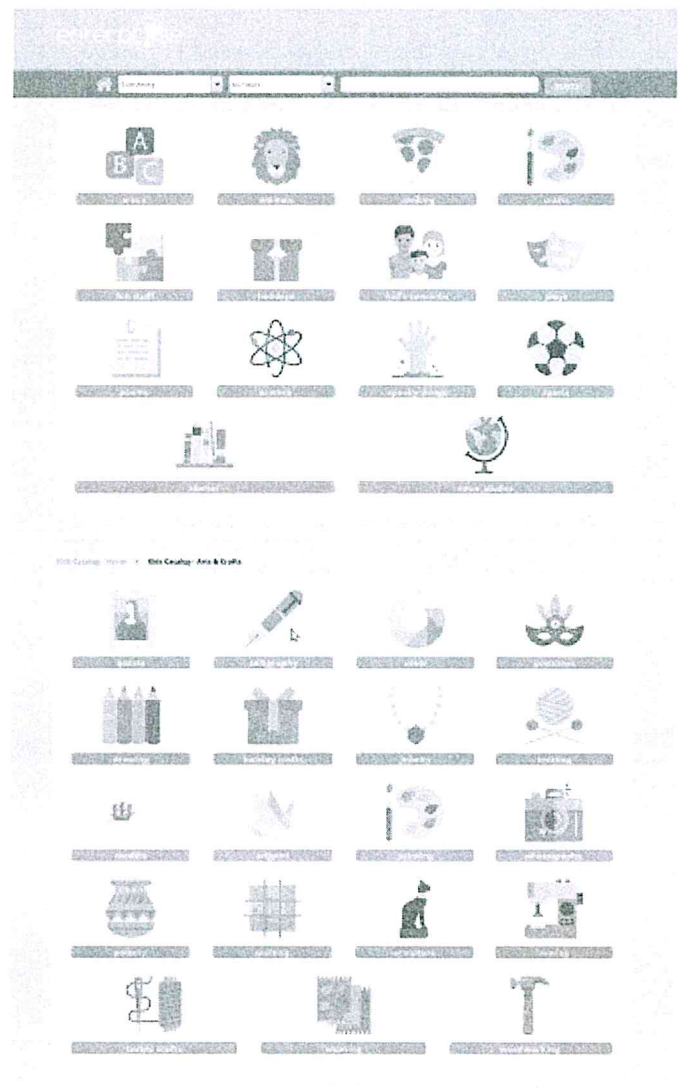
The fully redesigned Kids Catalog is now available for Enterprise. It is offered to both Horizon and Symphony customers. Imaged based, subject driven searching lays the foundation for this time-tested educational tool. An update to the original e-Library version, the new Enterprise Kids Catalog features icons with vibrant color schemes, diverse images and a modern design. A robust tool, the Kids Catalog is appealing to young audiences and encourages their exploration and development. Children are given not just dozens of categories to explore, but over 225 categories each of which is aligned to a specific, Librarian selected subject heading.

The Kids Catalog also features:

- A responsive design on mobile devices
- Full integration with eRC titles
- An easy to read search results display

Included with this product is our Kids Catalog SureStart Consulting service. Here you'll learn to customize the Kids Catalog to fit the needs of the children you serve. Learn to add categories for local history, special school projects, series and much more.

If you've purchased our Reading Information data update service which adds Accelerated Reader and Lexile information to your bibliographic records, AR and Lexile scores can also be added to the Kids Catalog search results display. This adds an additional layer of support for your emerging readers and their loved ones.



Live Demo: [http://sde15.ent.sirsi.net/client/en\\_US/kidcat/](http://sde15.ent.sirsi.net/client/en_US/kidcat/)



