

MSC Consortium Update

Spring 2021

Administrative

MSC New Contract Procurement Process

The Montana Shared Catalog's contract with SirsiDynix expires June 30, 2022. The RFI/RFP process is ongoing and requires the participation of a scoring committee which should be partially composed of individuals from MSC member libraries. State Library staff put out a Request for Information (RFI) and that has just closed and reviewing RFI responses will begin soon.

Symphony/Workflows 3.7 Changes

With our most recent Workflows upgrade, we have several new functions available to us. Listed below are the first three functions we are planning to roll out.

Workflows Login Passwords

New additions to security settings will allow MSC system administrators to configure password requirements and the length of time a password remains valid. This ability to expire staff passwords automatically and allow library staff to set new passwords themselves enables us to retire the "yearly password reset" process. We are planning to have this functionality live in early July.

Patron Alerts

We now have the ability to set a specific field on the User Extended Info tab to act as Alert pop ups in the Checkout and Display User wizards. We are currently configuring this function and we have a target completion date of the last week of May. We will post a knowledge base article with instructions for using this feature when we have completed the configuration.

Manage Hold Shelf Wizard

The Manage Hold Shelf Wizard is a new wizard that increases the options available for handling available holds, including those that have expired, been canceled, or been suspended. This wizard will replace the Clean Hold Shelf report and since it allows the librarians to directly manage those holds, it should help reduce issues caused by that report and its limited functionality. We will be transitioning from the report process to this new wizard in early July. Training resources will be provided in advance.

Database Maintenance

User Cat 4 Roll Out

During User Category cleanup after the Reorg, MSC system administrators designated User Category 4 to eventually replace Notify_Via on the Extended Info tab to indicate patron email notification preferences. It is now time to finish moving libraries to User Cat 4 and finalize the removal of Notify_Via. We will be completing the switch on Wednesday, June 9. That will include batch changing existing users, adjusting notice reports, configuring the User Cat 4 dropdown menu, and removing the

Notify_Via field from the Extended Info tab. If your library has already made the change, this will not affect you. If you'd like to make the change before the 6/9 deadline, please [open a help desk ticket](#).

Item Cat 1 and Cat 2 Batch Load

In advance of annual statistics collection in July, we will load an item category 1 (format) and item category 2 (audience) policy for items with blank fields using a combination of item type and home location for all public and school libraries. No changes will be made to policies already entered. We anticipate filling cat 1 and cat 2 on an ongoing, annual basis but we highly encourage libraries to enter the data as they add new items for the most accurate statistics moving forward. Each library will have a minimum of options added to their drop downs for item cats 1 and 2 so that they can be maintained. We will include BOOK, CD, DVD, MAGAZINE and EQUIPMENT for cat 1 and ADULT and JUVENILE for cat 2. However, libraries may opt to use an expanded list of policies, and additional options can be added to your dropdown upon request. For a full list of available policies for each category, please see [Cataloging – Policy Lists](#).

Reclamation

In the next fiscal year, the consortium will begin a reclamation project with OCLC. A reclamation matches records from our Symphony database with records in WorldCat to set holdings; time stamp them; and cancel holdings on records no longer owned by the consortium. This process will ensure that our collections are as synchronized as possible with WorldCat and that our records include OCLC control numbers. Holdings set after the date of the scan/delete are retained in WorldCat. Therefore, you can continue cataloging while the records are processed. OCLC recommends, however, that you do not delete holdings during the reclamation process. This means that you will be able to set items to discard, but we will not purge them from the system until the end of our project. We will notify libraries before the reclamation begins and include more information about what to expect.

Reports & Analytics

Statistical Report Migration

We will begin migrating all statistical reports from WorkFlows to BLUEcloud Analytics. Once transferred, librarians will be able to subscribe to recurring reports by email or run them on demand. We anticipate finishing this project by the end of calendar year 2021. Before suspending WorkFlows statistical reports, staff will draft training materials, including a step-by-step-guide for creating report subscriptions. This change will better position the MSC for using SirsiDynix's cloud-based library management system for circulation and cataloging once it is ready for multi-type consortia.

Notice Changes

We will be transitioning to new notice reports that allow us more control over the appearance and formatting of notices. We will be adjusting notices beginning later this summer.

New BLUEcloud Analytics Reports

The BCA catalog of reports grows based on requests from our member libraries. While we add many reports each year, the following reports might be especially useful for your library:

- MARC Fields - List - reports that can be filtered by subject headings for diversity audits or other subject-based needs.

- Shared Reports > Collection Information > Collection Lists
- Item Discards & Deletions – Count - ongoing count of items discarded or deleted.
 - Shared Reports > Collection Information > Collection Counts
- Enterprise Search Terms by Library Profile - monthly list of search terms used per library.
 - Shared Reports > Enterprise
- Enterprise Google Analytics - revised version of the Enterprise dashboard which includes ongoing counts of sessions, account logins, clicks on resource links, and use trends.
 - Shared Reports > Enterprise
- BLUEcloud Mobile - reports that illustrate consortium use of the Montana Shared Catalog app.
 - Shared Reports > BLUEcloud Mobile
- Cat Map - interactive cat map for catalog clean-up tasks.
 - Shared Reports > Collection Maintenance > List Reports for Catalog Clean-Up

Mobile Apps

Training Resources: BLUEcloud Mobile and MobileStaff

A series of articles will soon be posted to the [Mobile Apps](#) section of the help desk knowledge base. Topics will include using **BC Mobile's Click & Collect** feature, as well as using **MobileStaff** to perform common circulation tasks, holds management, collection management, and user registration. Offline and kiosk modes, including a hands-free kiosk option, will also be addressed.

BLUEcloud Mobile Use

The Montana Shared Catalog app went live in November 2020. Since go live, readers have installed the app on 2,400 devices with the following use:

- 32,000 sessions launched
- 303,000 title detail pages viewed
- 41,000 information pages viewed
- 11,000 holds placed
- 9,000 items renewed

To date, ten libraries (and their branches) have purchased a custom template which grants them access to additional features like library branding, local resource pages, mobile self-check, and curbside Click & Collect services.

Enterprise

Readers Advisory Information

The summary tab in Enterprise on the item detail display will now feature enriched content for all member libraries. When available for a record, the tab will include Accelerated Reader, Lexile, and the publisher's target audience. Other features include summaries, award notes, table of contents, and professional reviews. To help connect readers with their next book, "You May Also Like" displays top readalikes, similar series and authors, and genre recommendations. Readers Advisory information is available immediately in Enterprise and will be added to the Montana Shared Catalog app with an anticipated launch date in the next quarter.



The crossover

Author: Alexander, Kwame author

ISBN: 9780544107717

Physical Description: 237 pages ; 22 cm.

Format: Books

Select an Action

[Staff View \(MARC\)](#)

Available: [Explore Series, Awards and more](#)

Reading Level

Publisher-Recommended Age	From 10 Years to 12 Years
Publisher-Recommended Grade	From Fifth Grade to Seventh Grade
Accelerated Reader®	4.3 - Middle Grades (4-8)
Lexile® measure	750L

Other Books at Lexile measure 750L



[Browse by Reading Level](#)

Website Book Rotations

Included with the enriched content, we can now construct book carousels for use on external websites. The book cover rotations will be based on an RSS feed which can be generated using your new book list or other search parameters. You can read more about available options and request code for your website through our [knowledge base](#).

Cloud Carousel

