

San Francisco Public Library
Millennium Conversion Training Overview
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San Francisco Public Library chose Innovative Interfaces Inc's Millennium system in 2002 after a lengthy selection process. After the contract was signed a Millennium Implementation Team (MIT) was established in January of 2003 to deal with all areas of the conversion from the text-based system of DRA. The MIT group divided into 4 taskforces of which Training will be the one I will describe.

The Issues:

Millennium completely different from DRA from the start-up screen onward.
MIT taskforces still setting up the system – weekly changes.
Contracted for 3 Circulation Train the Trainers sessions using generic training material.
No OPAC training in contract.
Long-time circulation staff not familiar with basic mouse/Windows/PC functions.
Six hundred (600) staff members to train before August 27, 2003 (Go Live! Date).

The Steps:

Recruit trainers:

Asked for volunteers, asked staff with prior training experience and asked Branch Managers to identify staff from each branch with lots of circulation experience.
Administration supported volunteer trainers by supplying extra coverage to each branch.
Initial group of 30 circulation and 21 OPAC volunteer trainers.

Train trainers:

Send trainers to Innovative's 2 day Circulation classes.
Provide trainers with access to necessary computer manuals and Innovative training materials.
Arrange for trainers to learn skills such as using PowerPoint and familiarize them with training facility and equipment.
Facilitate meeting of staff trainers to cooperatively produce training materials specific to SFPL.

Timeline:

Innovative staff trained Circulation Trainers in 2 day sessions, June 23-July 2, 2003.
Meeting of all Circulation Trainers on July 11 to develop curriculum for in-house circulation training classes.
Separate group of trainers and other staff who were not interested in training but wanted to help worked with coordinators to produce training material and coordinate training standards, July 11-28.
Second meeting of all circulation training, August 1, to go over materials, to finalize plans and standardize training.
Set-up 14 one day training sessions in Main computer labs and in Chinatown computer lab for all circulation staff, August 4-15 and assign trainers.

Set-up 10 OPAC half day training sessions in Main computer labs for all reference staff, August 13-21 and assign trainers.

Classes:

For each class there was 1 lead trainer and 2 helpers that would switch roles for the 3 parts of the class – registration, general circulation and holds. Helpers would be in the audience assisting staff who were having difficulty and also to learn how to teach more effectively.

Modified training after first couple of sessions to target different staff.

Posted training manual, cheat sheets and other handouts on StaffNet so staff could review after the class.

A standard checklist was followed in each class.

Central email address for questions after class.

Designated trainers in each part of city to answer phone questions.

Current classes:

Taught by basic core of 10 trainers – most from original group.

Quarterly – Basic circulation, Basic holds, Intermediate circulation & holds, Advanced holds & management of holds, Basic OPAC, Intermediate OPAC, specialized classes as needed such as Create Lists.

One-one trainings or small group sessions held in branches.

In development self-directed online interactive tutorial for Basic Circulation.

Traits to look for in potential trainers:

Flexibility

Willingness to share

Spontaneous

Likes scripts to follow

Willingness to travel to other training venues

Open to helping others

Likes to help and share knowledge

Willing to come back with answers

Willingness to learn on their own

No preconceived ideas on what is right

Help from supervisors to mentor shyer staff

Benefits to trainers and system:

Continuing education

Stimulating

Contribution to whole system not just individual branch

Know the consequences of an unforgiving circulation system

Meet new staff

Sharing the knowledge

Learning how to motivate staff to be receptive to the training

Can monitor what has been learned

Can follow-up and evaluate other staff after each class

Develop writing skills
Develop different skills outside of civil service classification
Can teach staff how to deal with problems
Learn how to work as a team
Encourage other staff to volunteer to train
Continue to be involved the constant updating of the Millennium Circulation Manual
Continue to be tutors to all staff
Identify when specialized training need to occur
Diversified training from only Main staff to whole system

Current Millennium Resources page on Library's StaffNet:

Millennium Resources

Examples of [Hold Pickup Wrappers](#) [pdf]

[List of Millennium Enhancements for Release 2005](#)

[Macros, Keyboard Shortcuts, and Templates](#) 

[Updates](#)

[Millennium Issues Committee](#)

[Cheat Sheets](#)

- [Branch Codes and Terminal Numbers](#)
 - [Branch Codes \(without terminal numbers\)](#)
- [Complete List of all Location Codes](#) [Excel]
- [Create Lists](#)
- [Web Management Reports](#)
- [Working with Drop Boxes](#)
- [Setting up multiple windows in Millennium](#)

[Procedures](#)

- [Guidelines for Freeing Busy Records](#)
- [Holds Management List Creation](#) [Powerpoint Presentation]
- [How to get your Branch Statistics from Millennium](#) [Word doc]
- [Bulk Withdrawals Procedure](#) [Word doc]
- [Clear hold shelf instructions](#) [Word doc]
- [Holds list processing](#) [Word doc]
- [On the Fly Procedure](#) [Word doc]
 - [Form SFPL-511 for requesting on-the-fly barcodes](#)
- [Printing/Emailing Item Paging Lists](#) [Word doc]
- [Telephone shelf checks](#)

- Shelf-Checks Cheat Sheet (2 pages) [Word doc]
- Shelf Check Procedures with screen shots (11 pages) [Word doc]
- Uncataloged/Generic Materials Procedure

Training

- Millennium Circ Training Manual
- Millennium Training Page

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