<u>Fife High School Librarians (FHSL) Heritage Training 12 Nov 2021</u>

Fife Librarians Heritage Circa eTraining.
Looking at Cataloguing eResources, Stocktaking and Report writing. These were all subject areas FHSL group had identified as CPD requirements.

Session One: 9.45am-11.45am
- Cataloguing and promoting e:resources
- Engaging and attracting users with targeted notifications
- Setting up overdues via email – Basic Overdue Setup (editing letters to be covered in reports course).
- Adapting the online catalogue interface to suit your users. (A brief overview of the potential of Enquiry groups.)
- Setting up and moderating online reviews.

Total time for session one: 2 hours.

Session Two: 12.00pm-1.00pm
- Stocktaking made simple
- Configuring and planning a stocktake
- Scanning accession
- Processing the stocktake

Total time for session two: 1hour

Session Three: 1.30pm-3.30pm
- The reports manager - a guided tour
- Writing and customising reports with the Command Line Wizard
- Customising Overdue letter templates

Total time for session three: 2 hours

During regular FHSL meetings it was continually minuted that many of us were having unresolved problems with our Heritage systems, in particular, issues following Heritage Circa upgrades. We took our issues to our IT department but due to staff shortages these problems were not able to be addressed sufficiently. As a group, with no recent CPD on Heritage Circa and with many new members with little or zero training we felt our understanding of Heritage was not efficient, as such, we decided it was vital to put a training session together to bring our knowledge up-to-date and enhance our understanding of our database ensuring we were not as reliant on Fife Council IT department.

Initially we approached Heritage to enquire, but had to postpone the plan due to the cost of funding bespoke training and our limited allocated school budgets. One of our members was aware of the TAFLIN funding, from her previous employment and was put in touch with Laura Stewart at CILIP Tayside to initially enquire if our CPD training needs would qualify for funding. Whilst this had to be put on hold due to covid, once we resumed Laura was back in touch to discuss our CPD requirements.

We then contacted Heritage again to discuss the areas we felt we required to upskill. Eoin Garland our eTrainer put a programme together from the information we gave

him. We then passed this back to CILIP Tayside along with costs, for consideration. We were delighted to hear our request had been successful. This funding covered eight participants for a full day training session.

The eTraining session took place over Teams, with most participants working from home, and Eoin sharing his desktop to show examples and give instructions using his Heritage.

We discussed cataloguing and promoting eResources, and setting up overdues via email. We learned how to adapt the online catalogue interface, and how to attract users to the library stock by emailing targeted notifications.

Next, we looked at setting up and moderating online reviews, configuring, planning and processing the stocktake.

Finally, we had a guided tour of the reports manager customising overdue letter templates, and writing and customising reports with the Command Line Wizard.

Eoin was excellent at explaining each of the items on the agenda, he was clear and concise with instructions and happy to answer our questions as the day progressed. Eoin controlled the flow of each session, which worked out perfect with the timings.

As a result, we have all joined the Marvin contact support group and been in regular contact with each other to support and assist when trying new reports and other activities. The impact of this training is that all of the group can use Heritage with confidence and not merely as a means of recording the books being stamped in and out. We have also learned skills in writing reports, making sure the stocktake is done properly, and that we have our eSettings working efficiently, whether cataloguing eBooks or emailing overdues to pupils, which is not something we were able to do before. We are still getting a few error messages but with the post training notes Eoin sent us, Marvin support and support from each other we feel more confident when interrogating the data we can present.

Personally, I can now explore Heritage with confidence and have an enhanced understanding of the vast amount of reports Heritage can produce. I don't stock eBooks yet but I will know how to catalogue them in the future, and I have completed a stocktake in sections, which means I no longer need to wait until the holidays to complete this task. Every aspect of the training session was relevant in order to update our digital skills as school librarians.