SAILS Network News
Library Network

Instructions for Upgrading Workflows

SAILS will be upgrading our SIRSI server on Sunday, 12/7/03. This upgrade will require the libraries without Gold Support to upgrade their own Workflows computers on Monday 12/8/03.

Step 1. Logon to Workflows as you normally would.

- You will receive the message that your Workflows Client needs to be upgraded and would you like to upgrade it now. Click YES. Your computer will download the upgrade to your machine.

Step 2. You will receive a message stating that these changes won't go into effect until you restart the workstation.

- Click OK.

You do NOT need to restart your computer.

Step 3. Click on the Workflows icon again to begin the setup process.

- Click YES to upgrade your workflows client.
- Click Finish to end the setup.

Step 4. Logon to Workflows again as you normally would. The login will take longer than normal, as the program will be downloading new files.

SAILS Upgrade Timetable

11/27—Steve sends Workflows CD's to libraries

12/1—Email going to libraries with upgrade reminder.

Week of 12/1—Libraries with Gold support receiving call from SAILS.

12/3—Noticed posted to login screen of iBistro, telling patrons about the upgrade and unavailability of iBistro.

12/5—Schools receiving call verifying receipt of instructional CD.

12/6—Full backup, lasting about 4 hours.

12/7—Upgrade procedure begins, lasting until Sunday.

12/7—Libraries with Gold support will have their workstations upgraded.

12/7—Email will be sent when upgrade is complete, iBistro will be turned on.

12/8—Libraries may upgrade their workstations.

Note: if you wish to use standalone, which SAILS is not recommending due to difficulties managing the process, **you MUST contact SAILS** prior to uploading any files, and get our go-ahead.

Clean Holds Report - what exactly is it?

This report does not list items that have been on the hold shelf too long. It lists items where the hold has been cancelled by the patron in iBistro. Typically they receive an email notification, go into iBistro, and cancel their hold. Don't hold the items after the title appears on the list. Use the check item status wizard to see where the item needs to go.

The report that lists items that have been sitting on the Holds Shelf too long is run once a week on Friday

Cataloging Department Updates

The cataloging department has been doing a wonderful job keeping up with all of the requests. It's great that the libraries have been adding so many titles! The SAILS management would just like to remind the tech services staff in the libraries that until Kristin gets back from maternity leave, the Cataloging department is down one person.

The department's primary focus is to get the cataloging requests processed. Their goal is a 24 hour turnaround time, which they make each day, barring unusual circumstances. If you submit a cataloging error form, the staff will try to investigate the problem ASAP. If you're reporting duplicate titles, or corrections needed on older items in the catalog, they may not get taken care of right away. As of now, they have been working extremely hard to get everything done to their high standards. As other projects come up and they need to balance their priorities, the focus will be their top priority, which are the daily cataloging requests.

We would like to thank everyone for their understanding and offer congratulations to the SAILS Cataloging Department on a fantastic job.

Updating Cataloging Requests

Just a reminder that you can make corrections to a request record on the same day that you create that record. If you find that you have made a spelling error, you can go back into that record later in the day to update the spelling (or update any other type of correction that you need to make to the record). You can also use the Remove Title, Call Numbers, or Copies wizard to delete the record from the system only if your library is the only holding attached to the request record and only on the same day that you created that record.

Please do not use your library's Discard patron to remove a request record with spelling or other errors from the system. By using your library's Discard patron, that request record will stay in the system until the Remove Discards report runs each Friday. Putting such a record on your library's Discard patron is creating problems both for us here at the SAILS Cataloging Department and for other catalogers who are unsure of which record they should attach to in the system. Here at SAILS, we are getting charged twice for essentially the same record when we do our batch loading of ISBN's each morning into OCLC because the ISBN is on two records, the request record on the Discard patron card and the corrected request record.

You should continue to check all other items out to your library's Discard patron, as you have been doing. This reminder about the Discard patron only applies to newly created request records.

"you can make corrections to a request record on the same day that you create that record"

Library Collections not yet Available to Fill Holds

The following libraries are not yet filling holds:

FALLRIV-ES—Doran School
FOXBORO-HI—Foxboro High School
FOXBORO-MS—Ahern Middle School, Foxboro
NBED-NORMA—Normandin Middle School
NBED-ROOS—Roosevelt Middle School
BORDEN-ES—Spencer Borden School
GREENE-ES—Greene School

Doran, Roosevelt, and Ahern should be open for holds soon. The other sites are still entering their collections.

Defaults for Add Temporary Title and Add Patron

Almost every month I (Debby) get a question from someone about why counts don't match for monthly stats for patrons and items. When I check the report logs I always find transactions not counted because of missing item category1 or missing user cat1. To avoid this I suggest you enter a default value in these fields, particularly for fastadd. I have added a new item cat1 of FastAdd that you can begin using. I have also added a new User Category1 called NEW for newly registered patrons.

If you set your defaults for these two values we will be able to do the following:

1. Make sure your circ transactions are counted.

2. Run reports for you at a later date so the records can be updated.

To update your defaults, do the following logged in as tech.

To set your add temporary title defaults

1. Go to the checkout wizard

2. Go to the helpers folder, and click on Add Temporary Title.

To update your defaults for patrons

1. Click on Register New User under the checkout wizard and set your defaults.

2. You should also update your defaults under the regular Register New User Wizard.

3. If you use the Add Brief Title wizard instead of the Add Temporary Title in Checkout, please update your defaults there.

I think this will make things much more consistent for you and it certainly will make it easier for us to assist you in interpreting your reports.

Item Category 1 Clean-up Project

The new item category 1 of FASTADD and User Category1 of NEW are now displaying. Please be sure to add these to your default properties in **add temporary title**, **add brief title**, and **create new user in checkout** and the **regular create new user**. This will make your statistics much more accurate.

Do not use BIGBAND - use CD-Bigband
Do not use BOOKSONTAPE - use BK-TAPE
Do not use Blue Grass - use CD-Bluegrass
Do not use Americana - use CD-America
Do not use Cajun - use CD-Cajun

Notable Dartclix Sites—December Holidays on the Web

These are fully searchable website records, available in iBistro.

Judaism 101 — http://www.jewfaq.org/toc.htm
"This Web page is a listing of contents in a Jewish facts site. Visitors can scroll through the list of subjects such as: people, ideas, things, words, deeds, and reference. Within these sections there are subdivisions of subject headings with the label: basic, intermediate, or advanced, bolded in red next to the topic."
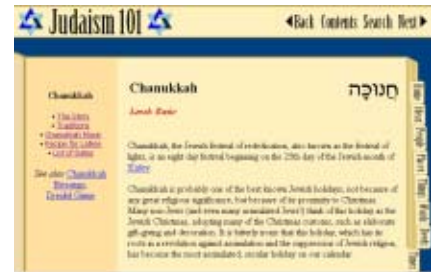
The history of the holidays—http://www.historychannel.com/exhibits/holidays/main.html
"Created by the History Channel, this Web site is a companion to a television program that explores the origins of three holidays that take place at roughly the same time each year: Christmas, Hanukkah, and Kwanzaa. Visitors can click on each of the three holidays to hear about world traditions and celebrations associated with that holiday."

Special exhibition. Christmas through the years—http://www.americanantiquarian.org/Exhibitions/Christmas/
"This Web site is an on-line exhibit that showcases a portion of the American Antiquarian Society's Christmas related holdings. Visitors can learn about and view artwork that illustrates the evolution of Santa Claus, the celebrating of Christmas, Santa's reindeer, the traditional Christmas tree, and Clement C. Moore's 1823 poem 'Twas the night before Christmas!"
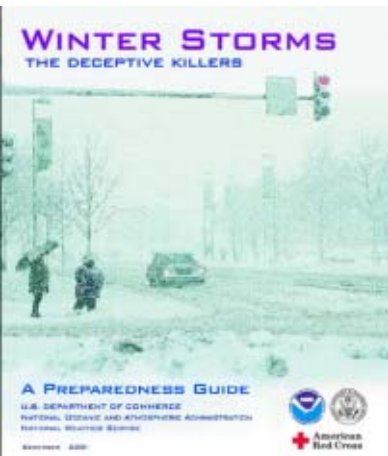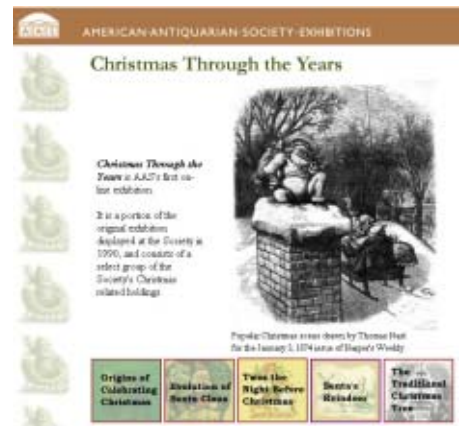
Winter Storms : the deceptive killers : a preparedness guide—http://www.nws.noaa.gov/om/winterstorm/winterstorms.pdf
"This Web site is an on-line resource dedicated to providing visitors with information on the dangers of Winter storms. Viewers will learn that each year many Americans die due to exposure to cold and the people can become trapped at home or in a car due to a heavy storm. Visitors can use this preparedness guide to help them deal with the obstacles they may face when a storm hits".

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Upcoming Training & Meetings

Upcoming Training

Detailed descriptions and registration information, are available on the SAILS website.

Beginning Serials Training
12/09/2003
9am to noon; SAILS Training Room

Beginning Cataloging Training
01/20/2004
9am to noon; SAILS Training Room

Upcoming Meetings & Events

Circulation Policy Committee
12/16/2003
9:30am; SAILS Meeting Room

Board Meeting
12/17/2003
10am; SAILS Meeting Room

PubPac Committee Meeting
01/07/2004
9:30am to 11am; SAILS Meeting Room

Technical Services Meeting
01/13/2004
10am to noon; SAILS Meeting Room

SAILS Network Statistics

FY04 Overview	December	November	October	September	August	July
Total Intranetwork Loans			48,551	39,894	44,057	47,458
Total Items Circulated			375,088	344,044	351,606	412,162
VirtCat Items Borrowed			673	620	408	518
VirtCat Items Loaned			295	318	250	301
Cataloging Requests			4,225	3,176	2,403	2,586
MARC Records Added			4,088	3,699	2,376	2,985
Patrons Added			4,240	6,935	3,571	3,513
Holds			28,163	24,411	24,421	25,558
Total MARC			898,448	893,731	890,100	888,434
Total Holdings			3,244,320	3,228,140	3,218,976	3,210,212
Total Patron			490,224	486,379	481,343	497,196

FY04 Overview	June	May	April	March	February	January	Total FY03
Total Intranetwork Loans							179960
Total Items Circulated							1,482,900
VirtCat Items Borrowed							2,219
VirtCat Items Loaned							1,164
Cataloging Requests							8,165
MARC Records Added							13,148
Patrons Added							18,259
Holds							102,553
Total MARC							893,731
Total Holdings							3,228,140
Total Patron							486,379