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Enterprise FAQ and Videos

As I've been traveling around to various libraries in the network and meeting staff here at SAILS, whether it be in person or online, one aspect of the catalog I have found few people to be familiar with is the FAQ page.

Have you ever noticed the link for "Enterprise FAQ" right above the search box in Enterprise?

Maybe you have noticed it and just never clicked on it. If that is the case there are three really good reasons to be familiar with this page and to bring your patrons' attention to it when helping them.

1) When troubleshooting Enterprise, we always mention browser issues and browser compatibility. This might make you wonder what browser is best for you and your patrons to use. The first thing you will find on the FAQ page is the current browser compatibility.

2) Again, when troubleshooting, visit the FAQ page when you've identified a problem. If it is a known issue, we often have the fix or workaround posted. This can save you time trying to solve the problem on your own.

3) Quick training videos. On the right hand side of the FAQ page are three videos that walk through very basic tasks in Enterprise: My Account, Basic Searching, and Placing Holds. These are posted for you and your patrons if a little help is needed getting started with the catalog.

The whole purpose of this page is to help people, whether it be staff or your patrons, use the catalog.

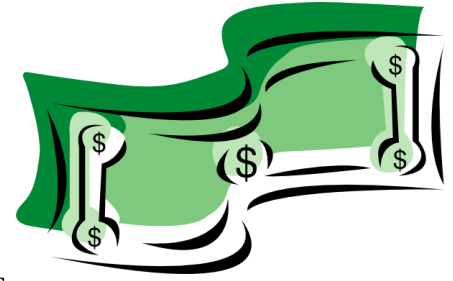
As library staff members we have multiple tools at our disposal to access our own personal accounts. Make sure one of the methods you use is Enterprise. This is the main interface your patrons use. The best way to be familiar with Enterprise when patrons come to you with questions is to use it yourself. The FAQ page is there to help you get started or to assist in solving problems as they come up.

Check it out next time you visit Enterprise! If the FAQ doesn't help to answer your issue, remember you can always email support@sailsinc.org and we will help get the solution for you.

-Ben

New Note Field in Bills

Now that we are on Workflows version 3.4.1 service pack 4, we wanted to highlight one of the new features of the upgrade. There is now a new note field in bill records. This is similar to a note you might place on a hold.



If your library wants to utilize this new feature there are a couple of things you need to keep in mind to get it working.

First, you need to turn the property setting on in order to have this field display.

1. You will need to be logged in as Tech
2. Right-click the wizard you want the note field to display and go into properties
3. Under the defaults tab, select the check box to "Show Bill Note"
4. Click OK

Second, notes can only be added to bills in Wizards that have the "Show Bill Note" setting turned on.

Also, notes can only be added to bills created after the upgrade to service pack 4.

Finally, notes can be added to new bills directly by using the Bill User Wizard or by right-clicking the bill after the fact and selecting "Edit Bill Note" in a circulation wizard that displays bills.

This feature is available in the following wizards. If you want to use it you will need to make sure the property has been turned on in all five of them.

- Checkout
- Billing a User
- Renew User
- Paying Bills
- Display User

Having a note attached to a Bill can help add explanation to vague billing reasons such as MISC or add context to a payment. Some payments are vague like CANCEL or FORGIVEN. Perhaps you want to add some context to why a bill was generated or why it was paid a certain way. There are many reasons you may want to add a note to a bill. If you didn't know you needed to turn on this option first, you might not have realized you even could add a note to bills.

Contact support@sailsinc.org if you have any questions.

Outside the Box: Get Involved!

A partnership between Redbox, OCLC, and the Partnership for Public Spaces has spurred a new program called Outside the Box. The idea is to utilize a shared community space in new and innovative ways. Through sharing the space, it will both help to connect the community together, revitalize underused spaces, and draw in more people to the library.

To get involved...

First you have to take the training at:

http://www.oclc.org/go/outsidethebox.en.html?urlm=168835&utm_source=Wh#training

Then, conduct a brainstorming session with your community.

And finally, Apply to be selected to participate in the program.

To learn more visit:

http://www.oclc.org/go/outsidethebox.en.html?urlm=168835&utm_source=Wh

This is an exciting opportunity to innovate and think beyond the four walls of the library!



FAQ—INP patron profile vs IP

There are 2 different patron profiles that a library may choose to use to check out items that are being cataloged and aren't yet ready for the shelf. Using one of these 2 patron profiles allows you to let your patrons know a title is in but not yet available. Use of either of these patron profiles is completely optional.

IP – If you check out an item to a patron record that has IP as the patron profile the items will display in Enterprise with a location of CATALOGING.

These **are not** holdable.

INP – If you check out an item to a patron record that has INP as the patron profile the items will display in Enterprise with a location of CHECKED OUT.

These **are** holdable.

If you are unsure of how your Processing patron is set up contact support@sailsinc.org. We can look it up for you and tell you the profile in use – it may not be displaying on the screen. And of course you can ask us to change the profile for you any time.

Notice Schedule

When patrons report having issues receiving some notices for holds and overdues, from time to time we have found that there isn't actually a problem with their account. What sometimes happens is the patron is merely expecting a notice before the system would actually be triggered to generate one. To address this issue we thought it might be helpful to include the current notice schedule in this month's newsletter. Especially since we have made changes fairly recently to the schedule it may not be clear to staff what schedule we are currently using.

Overdues

All forms of notice types use the following schedule for Overdue notices:

1st Overdue - sent at 7 days overdue

2nd Overdue - sent at 28 days overdue

3rd Overdue - sent at 56 days overdue

An Overdue reminder notice is also sent 3 days prior to the due date via EMAIL and SMS. If the patron uses VOICE and has an email in their record, they will receive this notice via email as well.

Holds

Hold notices are sent several times a day. When a patron is notified depends on the timing of when the hold is made available and when the next report is run. This is also why a patron might have several holds made available on a given day and receive multiple notices instead of just one.

EMAIL Notices are run at 11am, 2pm, and 9pm.

VOICE Notices are run at 8:30am and 2pm

SMS Notices are run at 9am and 2pm

An additional hold reminder notice is sent via EMAIL and SMS 2 days before a hold expires on the shelf. If the patron uses VOICE and has an email in their record, they will receive this notice via email as well.

We always recommend having an email in patron records when possible. We are able to send out more kinds of notices via email than we can via other methods. The reminder notices for both Overdue and Holds is just another example of this benefit.

Email support@sailsinc.org if you have any questions.

Director's Station Webinar Recording

We had a great turn out for the two Director's Station Webinars held late March and early April. If you were able to come, thank you again for attending and don't hesitate to contact SAILS with any follow-up questions.

Many who weren't able to attend requested that a recording be made of the webinar. The link to the recording is below for you to watch or pass on to the Director's Station expert at your library.

The recording is 40 minutes long. The presentation is around 20 minutes and the Q & A afterwards is about another 20. I thought the questions asked were really great and useful to other Director's Station users in the network. Just be aware that the sound quality does drop a little once I unmute everyone's phone for the Q & A.

<http://cc.readytalk.com/play?id=9dv3x9>

Email support@sailsinc.org if you have any questions about the new dashboard, Director's Station in general or would like to setup some onsite training with a staff member from SAILS!

Google Tip - Calendar Gadget

Have you experimented much with some of the more advanced options of your SAILS Gmail account?

If you utilize your SAILS account for your email and calendar, one helpful advanced feature of Gmail is to make your calendar display right in your inbox. The setting is a little buried but it could end up being a nice time saver not having to open up a different tab on your browser to view your calendar.

1. Click the gear icon in the upper right of your inbox.
2. Select Settings
3. Select the tab for "Labs" in the Menu bar once inside settings
4. Once inside Labs, scroll down until you see an item called "Google Calendar Gadget." Click the radio button for Enable
5. You're not done yet. Now scroll to the very bottom of the page and select Save Changes
6. Go back to your Inbox.

At the very bottom of your Labels you will see a new "..." icon. Click this to toggle your Calendar on and off while in your Inbox This isn't the only lab you should try. There are numerous labs to experiment with. All a lab is in Gmail is a non-standard feature. Kind of like an extension you might add to a web browser. Browse through the list of available labs and try a few. This is just another fun way you can personalize your SAILS email account. Here is a help document from Gmail on labs if you want to learn more!

<https://support.google.com/mail/answer/29418?hl=en>

Enterprise Training Schedule

Continuing through this fiscal year, SAILS will be hosting a series of Enterprise training sessions for library staff. These sessions will be held in the SAILS Meeting Room from now all the way through June. Topics will include: Enterprise Basics, Troubleshooting, Training Patrons, and Advanced Enterprise Topics.

There are only a few space left so save your seat now!

While there is no prerequisite to this workshop, a basic understand of Workflows and the difference between Workflows, your library's public website, and Enterprise is assumed.

Training Dates and Times. Click the date you are interested in to register.

[Tuesday May 13th—10 AM to 12:30 PM](#)

[Tuesday June 10th—12 PM to 2:30 PM](#)

[Thursday May 29th—1 PM to 3:30 PM](#)

[Thursday June 26th—9 AM to 11:30 AM](#)

For those unable to come to SAILS in person, we will be offering webinars as well. Each will cover different material. While one is not a prerequisite to the other, if the webinar is the only option you can take advantage of, then you might want to try to sit in on both sessions.

Helping Patrons with Enterprise: May 22nd—1 AM to 11 AM

Register online: <https://cc.readytalk.com/r/5l4cosmu59ir&eom>

Searching and Overlooked Features: May 22nd—3 PM to 4 PM

Register online: <https://cc.readytalk.com/r/y7kylvuqlgrq&eom>

More will be added each month!

We encourage anyone who can, to try to make it to one of the live sessions here at SAILS. The trainings at SAILS will be more in-depth and will cover all the material from the Webinars and more. It will be interactive and more of a hands-on experience than the webinars can offer.

We hope to see you either here at our new offices or online!

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Network Statistics

	March '14	March '13	Total FY'14
Total Intranetwork Loans	75,786	60,441	633,859
Total Items Circulated	371,594	365,497	3,141,664
Gutenberg	143	181	1,071
OverDrive Circulation	15,031	12,066	115,932
All Formats Circulated	386,768	377,744	3,258,667
VirtCat Items Borrowed	776	974	7,011
VirtCat Items Loaned	496	596	3,994
Cataloging Requests	7,086	4,777	49,591
MARC Records Added	6,356	4,262	44,289
Patrons Added	2,598	2,245	32,752
Patron placed holds	63,343	60,217	519,498
Total MARC	1,137,974	1,166,464	
Total Holdings	3,610,098	3,639,340	
Total Patron	475,783	474,383	

Upcoming Events

[View the full event calendar](#)

- **5/6—Circulation Users Meeting**
10AM—12 PM, Lakeville Public Library
- **5/13—Enterprise Training**
10AM—12:30 PM, SAILS Meeting Room
- **5/15—Technical Services Meeting**
10AM—12:PM, Middleboro Public Library
- **5/21—Membership Meeting**
10AM—12 PM, Norton Public Library
- **5/29—Enterprise Training**
1 PM—3:30 PM, SAILS Meeting Room