SAILS Network News

Library Network   November 2002

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Unicorn 2003
Circulation Related Features
General Release By Mid-2003

Enhancements to Lost Book Processing
Unicorn 2003 will include enhancements to WorkFlows' lost item processing capabilities. The Mark Item Lost wizard will give staff members the option of billing the patron for the lost item, or waiving the bill. A new report will allow staff members to mark items as "assumed lost" automatically after a specified time period that the item is overdue, bill patrons for the items according to configured lost item billing policies, and prepare lost item billing notices.

Lost items remain on the patron's charge list with a status of "assumed lost" or "claims lost" until the lost item bill is paid, or until the item is returned or found. If the patron pays the lost item bill, WorkFlows removes the item from the patron's charge list, but retains the item's LOST status. If the item is later returned or found, WorkFlows notifies the operator that the item's status of "assumed lost" or "claims lost" will be cleared. The staff member can run a report or display paid bills to determine the refund due to the patron. If the patron does not pay the lost item bill before the item returns to circulation, WorkFlows removes the lost item bill from the patron's bill list. Workflow calculates the overdue fine and adds the overdue bill to the patron's bill list.

WorkFlows prevents holds from being placed on items marked with an "assumed lost" or "claims lost" status. Lost items are not considered when WorkFlows determines which items are eligible to fill holds, and cannot be recalled to satisfy a hold.

Enhancements to the Standalone Client
Sirsi's standalone workstation client enables a PC to record circulation transactions if the Unicorn server is unavailable for any reason. Sirsi has always supported the use of a standalone client. When the original character based standalone client was first developed, it was comfortable to use because the "live" client that was used to access Unicorn was also character based. However, as Sirsi's graphical "live" clients were developed, first InfoVIEW, and later WorkFlows, the original standalone client seemed much more cumbersome to use because the character client had become unfamiliar.

Standalone WorkFlows, Sirsi's new graphical standalone client, still performs the same basic circulation functions that were performed with the original standalone client, but Standalone WorkFlows has the menu bar, toolbar, wizard, property, and gadget structure to which current WorkFlows customers are now accustomed.

As with the original standalone client, Standalone WorkFlows can run without connecting to the Unicorn server, and uses basic WorkFlows processes to prepare the client for use and to integrate the transactions collected into the live Unicorn system.

Blanket Holds
A new type of hold called a *blanket hold* has been added to the types of holds that can be placed in Unicorn 2003. A blanket hold is a single hold request that is placed on multiple titles or copies, and requires a specified number of titles and/or copies to be made available to the patron before the hold is considered to be satisfied.

The Place Blanket Hold wizard has been placed in the Holds Information and Maintenance wizard group on the Circulation toolbar to help staff members to place blanket holds on titles and copies. Once a staff member places a blanket hold with this wizard, Unicorn makes item copies available for the blanket hold according to the Demand Management rules of availability for each title or copy. Staff members distribute copies to the patron or patron immediately after Demand Management makes them available instead of waiting until all of the requested copies are available to fill the blanket hold.
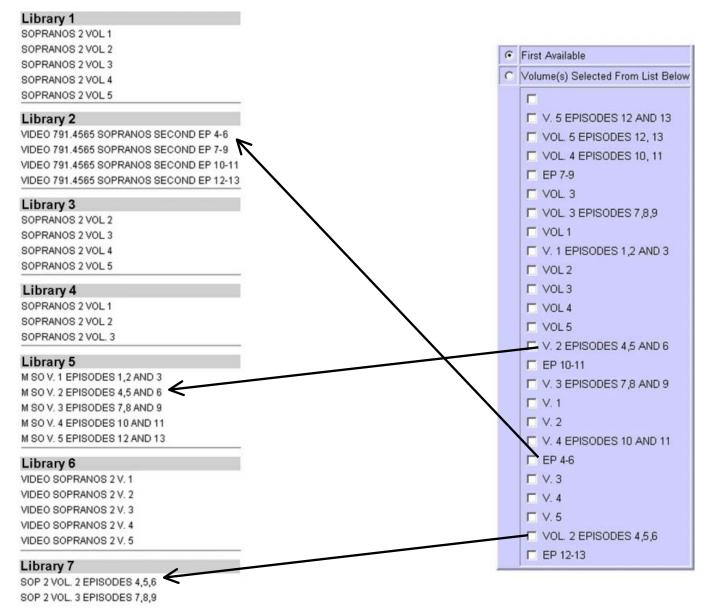
How do Holds Work for Multiple Volumes?
An explanation of how call #'s affect holds.

There are 3 levels of holds: title, call #/volume and copy. A **title level hold** is anything with that title (bib record), regardless of the volume or call#. A **copy level hold** is on a specific barcode (item). Then there is the **volume (call #) hold**.

If the volumes in the call #s are the same, the hold is placed on a specific volume. For example, if five libraries all use the call # of SOPRANOS 2 V. 2, and a patron places a hold on the item, it can be filled by any of the 5 libraries. If 3 other libraries choose to use a call number of SOP 2 V.2 (notice there isn't a space), iBistro will display both the SOPRANOS 2 V. 2 and SOP 2 V.2. Since each library has the option of writing their volume #'s differently, the holds often act more like copy level, than call# level.

The subfield z (|z) in a call number works the same as adding a v. - it tells the system it's a specific volume, and lists the item as a separate volume in iBistro. If libraries use the same exact volume #'s, the items aren't all listed individually.

The example below shows how a patron, requesting Episodes 4-6 will need to place a copy specific hold, since all the volumes were entered differently. Had they been the same, the patron would get the first of the 3 available copies, rather than having to wait for the specific copy requested.

FY03 Overview	December	November	October	September	August	July	Total FY03
Total Intranetwork Loans				40,397	44,283	43,292	127,972
Total Items Circulated				334,307	372,278	414,540	1,121,125
VirtCat Items Borrowed				556	365	218	1,139
VirtCat Items Loaned				116	111	69	296
Cataloging Requests				2,936	3,472	2,702	9,110
MARC Records Added				3,043	3,258	2,994	9,295
Patrons Added				5,671	4,406	3,355	13,432
Holds				20,699	21,331	20,887	62,917
Total MARC				857,982	854,671	842,960	842,960
Total Holdings				3,114,532	3,101,119	3,083,156	3,083,156
Total Patron				486,347	482,342	479,073	479,073

Virtual Catalog Tips & Tricks

Question: Why does the Virtual Catalog sometimes take so long to return results? (Sometimes I wait for over a minute while the IE world turns before the Virtual Catalog gives its list of hits).
Answer: The Virtual Catalog sends searches out through its z39.50 client to members' z39.50 servers in their local library systems. If a local library system isn't returning results right away, either because its server is slow or there is some other problem, then the Virtual Catalog will wait 90 seconds before giving up. This is 90 seconds to wait before any results are seen; so usually if the search takes a long time, one of the libraries in the hit list will say "search timeout."

Tip: Don't Click "Submit" twice in Provisional Requests (this causes request to go Unfilled). It sometimes takes a long time for a request to register as "Submitted" in Provisional requests – it may show as not "grayed out" or not disappeared from the list for several hours. This may be confusing, if several titles are similar.

Tip: Only enter "notes" in a request if the lending library needs to see them (such as "patron wants volume 3, not "Patron's phone number is 555-1224." This causes the request to require manual intervention, and can hold up the request and be more difficult to process.

Tip: If an request expires in our system, do not try to replace the hold in WorkFlows for Ursa patron it was showing for on the RHA. When it "dies" in our system, it goes on to another network. If we're the only ones who have the item, you can try to find who requested it in the VirtCat and suggest they try to place the request again.

NESCUG Meeting Notes

Steve Wilson and Laurie Lessner attended NESCUG's (New England Sirsi Consortium Users Group) first meeting on Friday September 27th, 2002 at the Capitol Region Library Council, in Windsor, CT. There seemed to be 2 major issues people wanted to use this group for: power in numbers for reporting enhancements to Sirsi and resource sharing (documentation and knowledge).

Most people's issues included running so many reports and holds. People also had questions about iBistro configuration. SAILS will be hosting and creating a website which will include a directory of the NESCUG participating consortia, their system & library(s) profile (what modules are in use, what version they are running, etc.), and the staff members and their areas of expertise. We will also have a place to post training materials, patron instruction and promotional materials, to share among the group.

A steering committee will also be formed to isolate the top enhancement requests and notify Sirsi of these.

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Welcome to Our Newest Staff Member

As I am sure you know, Ray Connetta resigned from his position and his last day was October 25. On behalf of the Personnel Committee, I am pleased to announce that this position has been filled. Our new staff member's name is Todd Mercer. He will begin employment the week of November 12. We consider ourselves very lucky that we were able to identify a strong candidate so quickly thereby minimizing possible service interruptions. – Debby Conrad.

Upcoming Training

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

Outreach Services
11/07/2002 10am to noon
SAILS Training Room

Serials Training
11/14/2002 9am to noon
SAILS Training Room

Utilizing E-mail for Customer Service
11/19/2002 10am to noon
SAILS Training Room

Upcoming Meetings/Events

Tech Services Meeting
11/06/2002 10am
SAILS Meeting Room

Broadcast Initiative Meeting
11/13/2002 1pm to 3pm
SAILS Training Room

Board Meeting
11/20/2002 10am
SAILS Meeting Room

Upgrade to Unicorn 2002
Sunday 11/10/2002
Monday 11/11/2002
SAILS Central Site

Upgrade to Unicorn 2002

We will be installing Unicorn 2002 on November 10 and 11. The system will not be available on Sunday. CD's with the new software will be placed in the delivery system to all libraries no later than Tuesday.

PC Support Libraries will receive information from Steve Wilson regarding remote Workflows installation.

We will be sending out a more detailed message about this release by November 6. Please note that while there are some enhancements to the software, this is not a major release and does not require substantial retraining.