SAILS Network News
Library Network

Unicorn 2003 is Coming!

This edition of the SAILS Newsletter contains important information on the upgrade to Unicorn 2003. You will find instructions for upgrading Workflows, changes to Circulation, and reviews of common circulation problems.

Instructions for Upgrading Workflows

SAILS will be upgrading our SIRSI server on Tuesday November 11th   (Veterans' Day). This upgrade will require the libraries to upgrade their Workflows computers.

Please follow the instructions below to upgrade your Workflows client. This will need to be done on each machine that Workflows is loaded on. You can begin upgrading your Workflows machines on Wednesday November 12th or thereafter.

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.

If you experience any problems with the upgrade the please call (508-946-8600 ext 12) or email (support@sailsinc.org) the SAILS office.

Subfield z and You

Some of you may notice a strange phenomenon when dealing with patron placed holds in iBistro. A patron may want a specific volume, yet receive another. This is affected by the call number.

Lets use the Sopranos as an example. Since there are multiple volumes attached to a single title, it is the responsibility of the individual libraries to include |z as part of the call number, to allow patrons to place volume specific holds. The |z in the call number triggers the system to display the various volumes, letting the patron choose which they wish to put on hold.

Complete instructions on the Subfield z issue is available in the SAILS Policy Manual.

Procedure: Clearing the Hold Shelf

Clearing the Holds Shelf when patrons cancel their holds after they become available:

1. Check the daily Clear Holds Shelf report. It is sorted by library and is available via email or by logging in to the RHA account.

2. If an item is listed under your library, pull it from the Hold Shelf and use the Check Item Status wizard.

Clearing the Holds Shelf when patrons don't pick-up their materials.

SAILS runs a Hold Shelf report every Friday. This will list items that have been available for pickup for more than 7 days. This should be checked every week.

1. To cancel the hold the material may be checked-out to some patron, then checked-in. You can create a XXXNOTPICKEDUP user, or use any in-house patron.
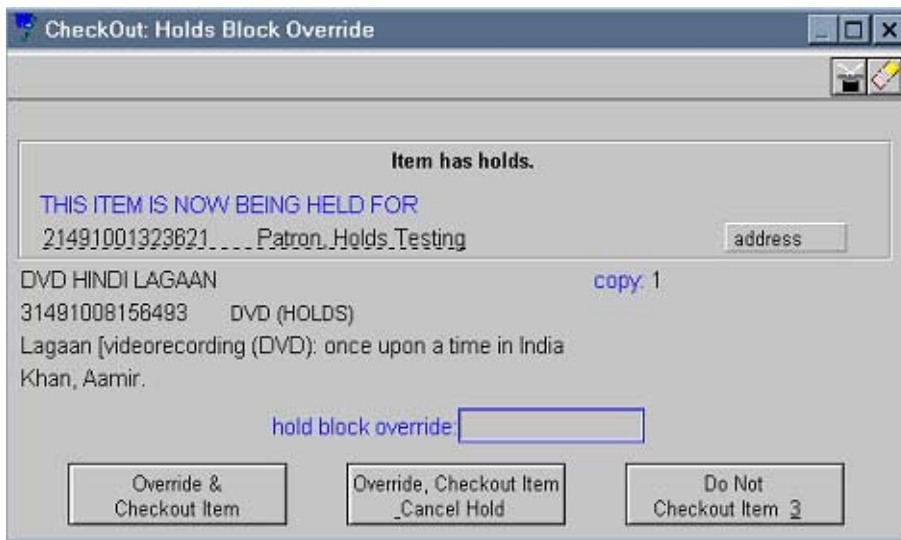
In this example, this DVD will be checked-out to ACUNOTPICKEDUP, because the patron did not pick it up in time. He is still on hold, so you will need to use your override. It is important to click on the Override, Checkout Item, Cancel Hold button.

When this step is complete, discharge the item and it will be routed appropriately. It may trap another hold, or be sent back to the shelf, or put In Transit to another library. The advantage of this process is that you have a record of the title

having been checked out to the Not Picked Up patron. If you decide to create this type of patron, give it a User profile of CIRCDESK. Assign it a User Cat1 of NP and User Cat2 of In House. The disadvantage is that this does create a circulation transaction.

You may also use the Remove Item Hold Wizard. The system will prompt you with the next step to take. The advantage of this process is that it does not create a circulation transaction.

With either procedure, update the notes field in the patron record indicating that the patron did not pick up the item in time. Once the patron has been so informed, you can delete the note using the snowflake helper in update user.

You may also send a message to the patron using the Send User Message wizard.

What In the World Is A BLOG?

If you have visited the SAILS website for member library staff recently, you may have noticed some new entries: Cat-Blog, Circ-Blog, Systems-Blog, Ref-Blog and Directors-Blog.. A BLOG is a weB LOG and we have used that terminology to indicate a place where you can find all those email messages we send out regarding system problems or procedures. The messages are listed chronologically with the most recent message listed first. These Blogs are indexed and searchable using the Site Search option. So, don't worry about saving all those email messages from SAILS - we will do the work for you.

CIRC FAQ'S – Common Error Messages

### Item database error - unable to process request—

The Unicorn system contains numerous databases, such as charges, bills, orders, bookings, etc., that work together to manage the data needed for the various workstation functions. A database error occurs when the data the system receives from one database does not match a setting in another database. These error messages should be reported to SAILS. They are resolved by Sirsi.

User has requests – cannot remove—

There is an outstanding message or request on the patron record which you cannot view in the User Display option. Go to the Request Toolbar.
Select the Remove Request Wizard.
Enter the patron's id and remove all the requests. You may then delete the patron record.
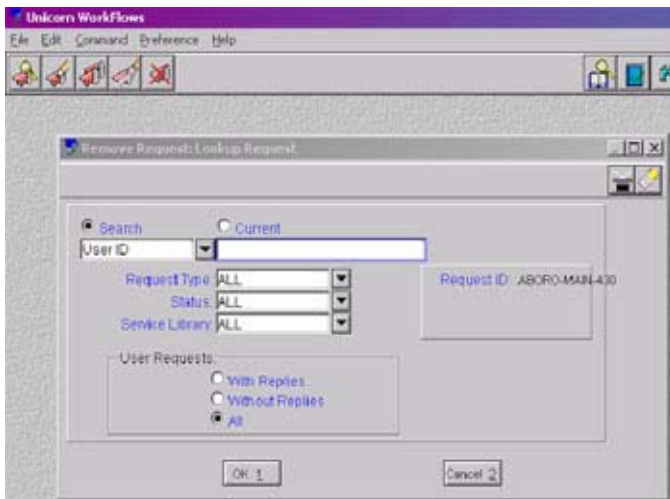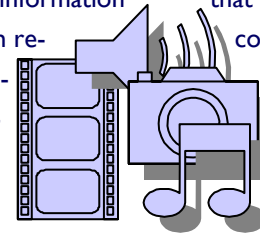
User cannot check out this item—

The item has an item type that is set to only circulate to certain types of patrons – such as faculty members in a school setting. Typically this will happen if a juvenile card holder is attempting to check out an item that is restricted to adults users.

NELA Annual Conference Report, Worcester, MA

Jennifer Michaud attended the last day of the NELA Conference to take part in the discussions that focused on cataloging issues. The Bibliographic Control Fast Forward: Audio-Visual Cataloging Forum presented recent changes to audiovisual records as well as reminders of the information that needs to be included in such records. Staffing Models for Integrating E-resources highlighted the workflows process of acquiring and processing e-journals, but little mention was made to the cataloging aspects of these materials. Speak up Sandy!: Ethics and Social Responsibility in Technical Services stressed the need for catalogers to critically evaluate records in shared databases before downloading those records into their local system. The topics covered by these discussions (as well as a booklet about graphic novels found at an exhibit booth that should help the Department with cataloging those books) will prove to be beneficial to the SAILS Catalog-

iBistro 2003 Preview

SAILS has been working on configuring the new iBistro interface, which is available with Unicorn 2003. It won't be installed immediately, but will follow after the SAILS produced patron materials have been updated to reflect the changes.

You will find the look and feel to be much more stream-lined, especially the full details page. The holdings information is the first to display, so patrons will be able to quickly see the availability.

For a sneak-peak of the work in progress, log onto our test server at: http://salt.sailsinc.org.

Notable Dartclix Sites

These are fully searchable website records, available in iBistro.

The First Thanksgiving—http://teacher.scholastic.com/thanksgiving/index.htm

This Web site is a comprehensive reference tool for elementary and middle school aged students interested in learning about the voyage on the Mayflower and the experiences after landing in Plymouth in 1621. Enjoy the picture timeline story of the Pilgrims first year in America with the Wampanoag, beginning before the Thanksgiving feast and find out how the Wampanoag helped them to survive in the New World.

Thanksgiving in American memory—http://learning.loc.gov/learn/features/thanks/thanks.html

This Web site discusses the proclamation of thanks to God on October 11, 1782, issued by the Continental Congress following the success of the Revolutionary War. The site provides this document in full, as well as a Thanksgiving timeline and historical stories and photographs of Thanksgivings in the past that were cause for greater than usual celebrations of thanks.

Unicorn 2003—**Changes in Checkout**

When Unicorn 2003 is installed, SAILS will be turning on the option to display all patron information in a single screen when you wand in a patron barcode at Checkout.

With this single display you can tell a patron what they have checked out, on hold, etc. New checkouts will appear at the top of the screen and will be the only items printed on a checkout slip. You can use the printer icon to give the patron a printout of their entire record. Also, you can view the patron to be sure the telephone number, user categories, and profile are correct. And for those libraries interested, patron photographs can be attached to a patron record.

Inactive Charges added to display options for the User Display wizard:

Under the Checkouts folder in User Display you may choose to display all active checkouts which will include claimed returned items, inactive checkouts only (lost), claimed returned only, overdue items only, or items that have been renewed.

Limiting holds display in User Display

There is a behavior you can set for the User Display wizard that will allow you to limit the display of holds placed by a patron to a specific pickup library. You may also limit the display to only available holds.

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Upcoming Meetings & Events

PubPac Committee Meeting
11/05/2003
9:30am to 11am SAILS Meeting Room

Technical Services Meeting
11/13/2003
10am to noon SAILS Meeting Room

SAILS Board Meeting
11/19/2003
10am SAILS Meeting Room

Upcoming Training

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

Beginning Cataloging Training
11/06/2003
9am—noon SAILS Training Room

SAILS Network Statistics

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

FY04 Overview	June	May	April	March	February	January	Total FY03
Total Intranetwork Loans							131,409
Total Items Circulated							1,107,812
VirtCat Items Borrowed							1,546
VirtCat Items Loaned							869
Cataloging Requests							8,165
MARC Records Added							9,060
Patrons Added							14,019
Holds							74,390
Total MARC							893,731
Total Holdings							3,228,140
Total Patron							486,379