SAILS Network News
Library Network

Special Edition—Upgrade Issue

GL 3.1 Upgrade Instructions

The system (Workflows & iBistro) will be off-line all day Sunday, November 5. SAILS will call libraries when it is available on November 6. Check your email for the latest information

For libraries who **aren't on the PC Support** program, you will need to upgrade your staff workstations with this latest version of Workflow. Libraries **with PC Support** can arrange for remote updates but computers MUST be left on over the weekend. Please complete the form at http://sailsinc.org/forms/UpgradeRequest.asp.

Upgrade instructions that include pictures are available online at:
http://www.sailsinc.org/sirsi/UpgradeInstructionsGL3.1.pdf

1. All Workflows staff workstations must be upgraded before using the system.

2. Try to stagger the updates so you are not updating more than 1 or 2 at a time. Smaller libraries with fewer than 4 workstations should only do 1 workstation at a time. If you are doing your own update, the first time you click on the Workflows Icon you will get a message asking if you want to update your client. **Click, "Yes"**.

3. After some files are downloaded to your computer (this may take some time) you will see a note that says the changes won't go into effect until you restart your workstation. **Click "OK"**.

4. You will be logged out of Workflows. **Click on your Workflows Icon again to restart Workflows.**

5. The computer will then "unpack" some files that had been downloaded and you will see a screen asking again if you want to upgrade. **Click "Yes".**

If you run into any problems, or have any questions, please feel free to contact the SAILS staff.

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Workflows Installation Issues:
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Circulation Issues:
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Cataloging Issues:
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iBistro Issues:
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GL 3.1 Upgrade Instructions

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6. You will see files being copied to your computer. When it's done, you should see a screen saying that the client was successfully upgrade. **Click the "Finish" button.**

7. You will need to Click on your Workflows icon ⬚ one more time and you can log in. We recommend that you log in as Tech so that you can immediately check your Properties. Only Tech Logins can revise behaviors.

Critical Circulation Property Updates

** Login in as tech rather than circ.

Autofill in Data Entry
If you type in the incorrect user profile and hit okay, you receive an error message about patron duplication and are then caught in an error loop. We recommend using the **drop down lists** in patron registration until we move to the Java client.

Hold Property Changes
Update the properties for *Place Hold, *Modify User Hold and *Modify Item Hold.

*   In all 3 wizards, turn on the Suspend Hold display
*   In Place Hold, Set the "Pickup library default" to Workstation Library
*   In Place Hold, set the "Hold Level" to Title and the "Hold Range" to Group

Checkout Property Changes
*   Make sure the "automatically renew items already checked out" behavior is unchecked.
*   Make sure the "clear previous user id" and "clear previous item id" behaviors are checked.

Discharge Property Changes
Make sure the "Clear previous Item ID", "Display Instructions", and "Display "item not checked out" error in a separate window" are checked.

All Circulation Properties
As time permits all Properties in Circulation should be double checked. Refer to Circulation Properties GL 3.1 C Client manual for more detailed information.

http://www.sailsinc.org/circ/GL3.1CircProp.pdf

Critical Cataloging Properties

There are no significant changes to Cataloging Properties. As with any Software Upgrade, you should check your properties to ensure they transferred properly during the Client Update.

Behavior Changes in Add Title and Add Volumes/Call

In the Add title wizard behaviors there is a new option - Add Item. This should be checked. This will turn on the option of adding another copy when you have finished entering another record. This behavior is also in the Add Volumes and Call Number wizard.

Global Edit Wizard

There are new options in the Global edit wizard:

> Edit Copy library
> Edit Price
> Edit Shadowed

New Serials Control Helper

In Create Serials control wizard and the Modify serials control wizard there is a new option on the helpers tab, Modify Bibliographic Description. This helper should have the following defaults set to: Entries set to ALL instead of FULL. Fixed fields should not be checked.

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iBistro Changes & Enhancements

There are several new features in iBistro, but none require any changes at the library level.

- Patrons can place holds off the hit list
- Patrons can suspend / unsuspend holds – single items or all
- Number of renewals will display under Review My Account and Renew My Materials
- Patrons can choose to search only Electronic Materials – Overdrive collection, Netlibrary, and some items available in History SAILS On...
- When patrons find no titles to match their search, the link to the Virtual Catalog will automatically log them into the Virtual Catalog, with pickup library based on the library in their patron record. (Only available at home). In library will open Virtual Catalog login page (no change).
- Patrons can view the past Hot Sites list and browse the library HQ cataloged websites.
- Call number browse returns off the advanced search page (this is dependent on Sirsi completing a project for us. If they don't, the Call Browse available from full details by clicking on "Find items on the same shelf") The hold button is not currently available on the full details page if you perform a Call Browse search.

iBistro Changes & Enhancements

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Other changes include the layout of the iBistro home page.

Library Info:
- Library Info moves higher on the page, exchanging spots with Hot Sites
- "Online Magazines & Research Tools" heading takes people to your library's online database page (originally under Online Resources)
- "Online Magazines & Research Tools" heading takes people who have logged in with their barcode at home, to the at-home access to the databases (originally under Online Resources)
- Museum Pass Info will take patrons to a page containing:
    - ◊ .pdf file for all passes available at SAILS libraries,
    - ◊ link to libraries tixkeeper sites

- New Books, New Children's Books, & Museum Passes lists will be sorted by title.
- Library Hours will link to your library's profile & map on the SAILS website.

Online Resources:
"Online Magazines & Research Tools" will link out to webpage of library names. Patrons will need to click on their library to access your library's online database page - only available in-library. It will tell people that they can get the list of db's directly, if they click on "Online Magazines & Research Tools" under Library Info, on the home page.

Option for TixKeeper Subscribers

For libraries who subscribe to TixKeeper, if you wish your patrons to easily get to other libraries' TixKeeper online reservation pages, you can perform the following steps to add a link at the top of Tixkeeper to the SAILS Museum Pass page.

1. Log into TixKeeper as you would to make configuration changes.

2. Go to: TIXKEEPER - General Setup > click on Edit

3. Under TixKeeper List Header, copy & paste the following in the box:
`<a href="http://sailsinc.org/museum.htm">View museum pass information for other SAILS' libraries.</a>`

This will add the text "View museum pass information for other SAILS' libraries." at the top of your TixKeeper page. If you want different wording, just change the text in the link.

SAILS Executive Director's Report

The month of September marked the end of several projects and the initiation of two major initiatives to take place in FY07. The FY06 audit was completed successfully and our annual tax returns and state reports submitted. The FY06 annual report was also completed and distributed to all directors. Additional copies are available and it is also posted on the SAILS website. We will be distributing these to legislators at the February Ways and Means Day.

SAILS has selected Verizon as the vendor for our telecommunications upgrade project. Using a combination of grant funds from LSTA and the Gates Foundation as well as network reserve funds, this project will be the first major upgrade in our communications infrastructure in more than seven years. By its completion all members will be able to access SAILS' resources with sufficient bandwidth to provide acceptable response time. The project should be initiated in January and completed in March.

Version GL 3.1 was successfully loaded onto the test server and SAILS management staff has been testing it to make sure the standard C client is sufficiently stable for us to load the software onto the production server. We have decided that we will be loading GL 3.1 on November 5th. SirsiDynix is sending 2 consultants to SAILS to work with us if there are any problems and there will be a systems analyst in Huntsville to provide us with help if we run into any server related problems. While the new version does provide SAILS staff with the ability to run some different types of reports until libraries begin to use the Java staff client moving to the new version will be relatively transparent. Patrons will have some additional features they can use in iBistro. The November 1st newsletter will include information relating to GL 3.1 that will be needed as soon as we bring the software online for use.

The Cataloging Department conducted a very successful seminar on cataloging non-print materials and held a roundtable discussion at Somerset. Claudette has been out for the past 4 weeks on sick leave and we expect her return shortly. Kristin attended a Nelinet workshop about how to prepare grant proposals and she is hoping to submit a Laura Bush grant for advanced training in digital archiving.

Laurie is beginning to work on the new SAILS website which we hope to unveil by January 1. She has also been attending the focus groups sponsored by the MBLC as part of her participation in the Database Authentication advisory committee.

Steve and Jorj have been testing Wonderdesk, a help desk management package that would allow subscribers to PC support to submit their own help desk requests. They are still in the testing phase of this project. In the meantime, we will be announcing new procedures for members to follow when submitting service requests or error reports. Our volume of calls are sufficiently high that we need to work as efficiently as possible. I have written an article about this for the November newsletter and will be sending out a general announcement in December.
I attended the Unicorn Consortia SIG meeting in Chicago and the Customers of Dynix Inc. (CODI) annual users' conference. SirsiDynix is making some changes to how they handle help desk calls which we hope will improve our ability to solve problems we can't handle internally. SirsiDynix is also continuing to work on expanding the capabilities of Unicorn to make it more consortium friendly. While at the CODI conference I negotiated an agreement that will result in UUGI and CODI conducting a joint users conference in 2009.

The upcoming months will be very busy for SAILS staff. We are all looking forward to filling the Member Services Librarian position so we can begin GL 3.1 training.

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Upcoming Training & Meetings

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

Cataloging Non-print Materials Seminar
11/29/2006
9 am to noon, SAILS Meeting Room

Beginning Cataloging Training (Full)
12/14/2006
9 am to noon, SAILS Meeting Room

Upcoming Meetings & Events

Cataloging Roundtables
11/07/2006, 10 am—noon, Mansfield Public Library

Circulation Roundtables
11/02/2006, 10 am—noon, Somerset Public Library

SAILS Membership Meeting
11/15/2006
10 am, SAILS Meeting Room

PubPac Meeting
11/20/2006
9:30 am, SAILS Meeting Room

SAILS Network Statistics

FY06-07 Overview	Sept '07	Aug '07	July '07	June '06	May '06	April '06	Total FY07
Total Intranetwork Loans	56,840	63,481	58,666	55,782	60,272	51,646	178,987
Total Items Circulated	356,456	419,288	412,360	380,167	374,577	350,603	1,188,104
OverDrive Circulation	557	576	589	440	409	394	1,722
VirtCat Items Borrowed	1,199	1,270	1,129	985	1,259		3,598
VirtCat Items Loaned	561	518	515	439	572		1,594
Cataloging Requests	2,857	2,948	2,518	2,359	3,023	2,333	8,323
WebDewey Sessions	95	102	86	107	110	98	283
MARC Records Added	3,497	4,256	3,576	3,951	4,066	3,434	11,329
Patrons Added	7,243	4,235	3,024	3,099	2,306	2,502	14,502
Holds	41,864	45,261	43,938	41,708	42,811	40,072	131,063
Total MARC	962,085	959,615	957,002	955,666	953,565	952,231	962,085
Total Holdings	3,441,363	3,434,261	3,420,815	3,417,415	3,403,777	3,396,932	3,441,363
Total Patron	540,731	535,599	537,501	535,841	534,543	534,153	540,731
Total Uptime	99.9	98.2	99.11				