

Lost book processing in Unicorn 2003

SAILS will be installing the latest version of Unicorn in mid-November. One of the most anticipated features of the U2003 is the completely redesigned Lost Book Processing. With this new capability.

- Lost books will no longer be checked out to a LOST patron when staff members use the Mark Item Lost wizard.
- Libraries can determine the number of days an item is overdue before it is automatically set to lost. This will eliminate the need to manually review the LONGOVERDUE ITEMS report currently run by SAILS.
- Items automatically set to lost will also automatically generate a bill. Each library can determine if the bill will include a processing fee, whether the replacement cost will be based on the purchase price in the item record or a default price for the item type, and whether the patron will be assessed the processing fee even if the item is returned.
- Items set to lost will be flagged at check in as an item that had been lost.
- Lost items remain on the patron's charge list with a location 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, Work-

Workflows

Flows 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 location 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. WorkFlows calculates the overdue fine and adds the overdue bill to the patron's bill list.

If a lost item processing fee was assessed at the time the item was marked Claims Lost, and if Unicorn policies are so configured, the fee is automatically removed from the patron's bill record as well.

In mid-October we will be sending each library a short questionnaire asking when you want items set to lost and if you want to set a default replacement price for an item type or use the price in the item record. We expect to have this feature up and going approximately 1 month after the release is successfully installed. For more information about Unicorn 2003, see the Unicorn 2003 release notes for circulation on the SAILS website.

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Unicorn 2004 Specs

- Windows 2000 or XP
- 256MB of RAM
- 700MHz processor or faster
- 60 MB of hard disk space
- 1024 X 768 or better screen resolution (meaning you would need to have 17-inch monitors on each Workflows PC running Workflows 2004).

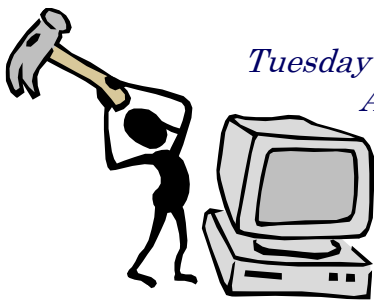
What to do with those Seasonal Collections

Do you have a seasonal collection that normally resides in storage? SAILS has created a new Home location of Shadowed for items that you need to have temporarily shadowed from the public. This home location does not take holds. This eliminates the need to check these items out to some in-house patron thereby creating false circulation statistics.

If you want to change a group of items to the new Shadowed home location or any other home location you can use the Edit Copies Globally wizard.

 The Edit Copies Globally wizard is the best way to change the home location of a group of items. It is available on the Cat toolbar in the Copy Maintenance group of wizards. You can also add it to the circulation toolbar. The wizard is named COPYEDITGLOBAL.

You must be sure to have your Behaviors and Properties set correctly before you use this wizard. You cannot set behaviors if you are logged in as Circ. Please see your Technical Services staff for help with setting behaviors. The Tech login is the only one that can set behaviors. For a complete set of instructions on using this wizard, go the Tech Tips in Cataloging or Circulation on the SAILS website <http://sailsinc.org/network>.



Tuesday October 28, 2003 at 09:30
AM

PC Maintenance Workshop

Learn what needs to be done to keep your computers up to date;

- When to do Windows Updates
- When to update anti-virus definitions
- Tips & Tricks to speed up computers
- General PC Maintenance

This workshop is intended for anyone responsible for updating or maintaining

Kristin's Maternity Leave Message

As you know, I am getting ready to go out on Maternity leave. My due date is approximately Oct. 25th and I am planning on being here until then unless "Baby Slater" decides to arrive earlier than scheduled. I will be taking 14 weeks of leave and should be back at the beginning of February.

Please remember to send e-mail to catsupport@sailsinc.org and **not** directly to me. Jenn will be handling cataloging issues. Laurie will be handling Sirsi problems and items of that nature.

If you have any questions please let me know.



User Services News

SAILS first User Services Meeting on Tuesday October 7 at 10 AM. Discussed will be; search hints, the virtual catalog, modifications to iBistro, how other departments (circ & cat) impact user services, and other topics of interest.

We've been getting some great responses to the User Services Survey. Thanks to those of you who have already answered. The survey will be taken down this Friday (October 3rd), so if you haven't had a chance to fill it out, do it quick!

The big news is SAILS first User Services Meeting on Tuesday October 7 at 10 AM. Discussed will be; search hints, the virtual catalog, modifications to iBistro, how other departments (circ & cat) impact user services, and other topics of interest. We will also go over the results from the survey, which I'm sure will generate some interesting discussion.

We have added a direct link to the patron materials available on the SAILS webpage, which is located in the Table of Contents under "Reference & User Services". Please feel free to customize for your patron's needs.

Notable Dartclix Sites

These are fully searchable website records, available in iBistro.

The Explorations of Christopher Columbus —<http://www.mariner.org/age/columbus.html>

Detailed accounts of the life and times of the explorer Christopher Columbus. Printable maps of his routes are included. The site also lists its collection of Columbus engravings, sketches, paintings and artifacts.

Christopher Columbus : ... his gastronomic persona—http://www.castellobanfi.com/features/story_contents.html

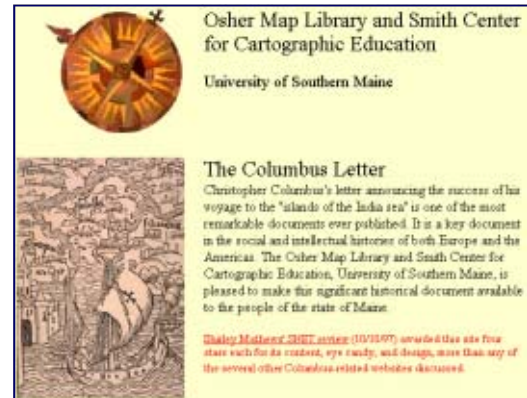


This Web site invites visitors to explore the life and accomplishments of Christopher Columbus, the man credited with discovering America. The site features several topic headings to browse or search through such as: the first voyage, return to Spain, his Portuguese days, second voyage, death, and legacy. Discover how Columbus' ambition to explore the "New World" gave Spain a rich legacy.

The Columbus letter

—<http://www.usm.maine.edu/~maps/columbus/>

This Web site discusses the letter that announced the success of Medieval explorer, Christopher Columbus to the "islands of the India sea." Visitors will find out why this document is so significant and why socialists and intellectualists proclaim it to have great worth. Read about this reproduction of the Basel 1494 edition of Columbus's letter and check out the literal translation of the Latin text into English.



Massachusetts Maple Producers Association—<http://www.massmaple.org>

This is the official Web site for the Massachusetts Maple Producers Association, a non-profit organization dedicated to the preservation and promotion of sugaring in Massachusetts. Find out what the organization supports and what its responsibilities are. Learn about ongoing research in quality control, environmental concerns, land development pressures, and long term tree health. In addition, the site contains FAQ's, educational materials, and

The Circulation Toolbox

SAILS has put together a Toolbox of documentation and Workflows shortcuts to make life a little easier for those of you working the circulation desk.

On the SAILS Website—<http://sailsinc.org/network>.

- The list of circulation and holds contacts for each library with their email addresses under the general information section of the website.
- The full set of documentation in the Circulation Section of the website
 - * The Circ Blog compiles all of the emails sent out to the circulation email list in the past 2 months.
 - * The Circulation Manuals including
 - ⇒ Essential Circulation Skills
 - ⇒ Holds Manual for Circulation
 - ⇒ Using Function Keys
 - ⇒ Overview of the CircLite Function Keys
 - ⇒ Patron Registration Manual
 - ⇒ An in depth chart of all the Patron Profiles and their corresponding rules
 - ⇒ Printing reports
 - ⇒ Printing Overdues
 - * All of the manuals are listed in both Arobat and Word format. If you want to customize the manuals to meet your library's specific needs, you can use the manuals in Word.
 - * A Policy Manual that lists all the policies adopted by the SAILS board that pertain to circulation functions.
 - * Tech Tips which answer specific questions about patron records, using Workflows, Procedures, and System Messages
 - * The error reporting form to use when reporting a circulation related problem on the system.
- ILL information
- * Report information that lists all of the circulation related reports run by SAILS, their purpose and their schedule.
- * Virtual Catalog information
- * Minutes of the Circulation Meetings held in the past 3 years.
- Printed material for use in your library:
 - * Using the function keys eliminates the need to move your hands from the keyboard to the mouse. SAILS created the CircLite toolbar with an accompanying function key template to meet the needs of staff who perform basic circulation functions. You can create your own function key templates following the directions in the Function Key Manual and use the blank function key templates also available from SAILS.
 - * Does your library allow patrons to check out items without a library card? SAILS has a notice that you can post in your library reminding your users they have to bring their library card with them if they use another library.
 - * **Coming soon!** Can't remember all the different ways to search for items and patrons? During the month of October, SAILS will be sending every library a search tip flier that can be posted on your computer monitor that lists reminders on searching our database for item or patron information.
 - * Bookmarks that list all the SAILS members that you can give to your newly registered patrons.

Name the Digital Collection—Win a Pizza Party!

SAILS is holding a contest to name the button in iBistro, which will link to the digital archives collection, formerly known as Hyperion. The prize will be a pizza party for your library. The PubPac committee will select the winner at their next meeting in November. The digital collection currently features the Middleboro Library's Cranberry Collection, Hanson's historical records, and Rochester's Public Archeology Library Architectural Reports. Also remember that this is going to need to fit on a button, so keep the names as short as possible. Entries must be emailed to lessner@sailsinc.org by **Thursday October 30th**. Be sure to include your name and your library's name. Winners will be announced Friday November 7th.



WorkFlows 101

What do all those terms mean??

TOOLBARS



Each Unicorn module (circulation, cataloging, etc.) is represented by a wizard toolbar. A toolbar displays the wizards relating to that particular module. Toolbars can be modified to add or delete wizards and then saved to a specific PC. The last toolbar used on a PC is the one that will display the next time someone logs into Workflows. To change from one toolbar to another right-click anywhere on the toolbar - then click Toolbar. The dialog box that opens not only allows you to select a toolbar from the Use list, but also allows the user to decide where the toolbar will be placed on the screen.



WIZARDS

A wizard is a button that represents a staff member's task

HELPERS



Helpers are represented by icons at the top of the wizard's window and provides options for doing work related to a wizard's task. Touching a helper icon with your cursor opens balloon help and flyby help to tell you what the helper does. Let's use the checkout wizard in our example of a helper. When checking out a book using the checkout wizard, if the patron tells you they didn't bring their card with them for you to scan, you can use the Lookup User helper to find the user's library card number without deviating from your original task, checking out the material. For example, the Lookup User, Register New User, User Lost Card, Pay Bills, Add Temporary Title, Confirm Address, Replace Item Barcode, Special Due Date, and Renew Privilege helpers are available from the Checkout wizard.

Helpers listed on the right side of the helper bar are used when adding or deleting field information. These helper buttons include the Restore, Erase, and Delete helpers.

Restore puts information back into the record that you have deleted - 

Erase deletes all the information displayed on the screen (Be Careful!) - 

Delete removes all the information in a specific field, including the field itself 

GLOSSARIES

Die another day [videorecording] due: 10/1/2003,23:59 ←

Additional information that can be displayed by clicking on a patron or item barcode that is underlined by a dashed line. Types of information that can be displayed include telephone number and zip code for patrons, detailed information about a circulation transaction when clicking on the due date in the checkouts folder, detailed information about a bill when clicking on the amount due in the bills folder, etc.

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TABS



User and item information is organized for display in tabs. User information tabs under patron information includes basic information, privilege, demographics, address, and extended information. Bills, holds, and checkouts are included in separate tabs when using the Display User wizard. Display item will include tabs for bib information, and volume. You can use the Function Key 2 to move forward between the tabs and the Function Key 3 to move backwards between the tabs

GADGETS



Indicated by the gadget icon, these tools make selecting field values easier. These gadgets can be used to select information such as date/time ranges, policy values, or monetary amounts.

PLATFORMS

Platforms, or raised areas of a window, can be used to access additional information. If you were to click on the display options platform shown below, you would see these options that would allow you to customize what you see.

If you click on other platforms, more information will be displayed about the patron or the item.



This is the window that will display if you click on "display options" shown above.

