SAILS Network News

Library Network

Sirsi Superconference – 2005

From February 27 through March 2 Sirsi sponsored its third annual Superconference. More than 900 people attended the conference coming from all different types and sizes of sites. Supported by the efforts of the Unicorn Users Group International (UUGI) and the DRA Users Group (DRAUG) this was an information packed conference that allowed customers to present programs on how they have implemented, supported, or "tweaked" their local system. In addition, Sirsi had a number of programs about upcoming release features, how to get the most from the system features, and several "gripe" sessions that gave us all a chance to vent

about various topics. One of best features of the conference is that it allowed Sirsi sites to get together with similar types of sites to discuss common issues and problems. SAILS is an active participant in the Consortia Special Interest Group (SIG). This year's SIG meeting was attended by a large number of senior Sirsi staff members including the Vice Presidents for Software Design and Development. After the meeting a Sirsi staff member said there were more senior staff members at this SIG than all the others combined and we hope this will mean a greater focus on developing consortium friendly enhancements and products.

Inside Gaylord Opryland at the Gazebo

This special edition of the SAILS Newsletter is going to highlight some of the information we obtained that we think will be of most interest to our members. You can also be sure more detailed information will be presented at different SAILS meetings

Special points of interest:

- *GL 3.0*
- *Technologies for Now!*
- *Holds Enhancements*
- *View GL 3.0*

Buzzwords for 2005

• **GL 3.0** On Monday, Sirsi announced the Unicorn Version 2005 has been renamed GL 3.0. There was much discussion about what the GL stood for (the most popular description among conference participants was Grumpy Librarians) but it stands for GLOBAL. The change in release names was in response to complaints

that naming release for a calendar year was misleading because many times a specific release isn't available until a year after its date. For example, SAILS just loaded the latest release – 2003.1.4. So, as we begin to discuss the features of our next release we will be referring to GL 3.0

• **Java Client** Workflows as you know it is being completely rewritten to be fully Windows and ADA compliant. It will run using Java software. While the basic features of Workflows will stay the same, such as setting properties and clicking on icons to initiate a specific

Buzzwords for 2005

action, the icons themselves have been redesigned to be ADA compliant and to be more consistent between modules and the screen layouts have been significantly revised to allow more information to be displayed and users to sort information by column. SAILS staff will be testing the current Java Client this spring but we don't expect to begin to roll it out for library use until very late 2005 when the "themes" version will be available. This version will allow you to set color and font and includes some nice navigation features that should make use easier. Of course, we immediately

began to talk to other large sites about how we can train our users to feel comfortable with the new version. The overwhelming reaction of the 900+ conference attendees was this was a major improvement over the current Workflows.

• **EPS** Sirsi has redesigned the public interface. EPS stands for Enterprise Portal Solution and eventually will replace iBistro. This product is much more web friendly and the product manager came from private industry. It is ADA compliant and gives the patrons more options in a cleaner format than iBistro. SAILS will be demonstrating this product later this year but we don't plan to imple-

ment in any specific timeframe.

• **PocketCirc** Sirsi has released a wireless circulation device that runs on a handheld computer. It can be used in off-line mode during downtime, in real-time mode if your library has a wireless network for inventory, bookmobile, or as a quick means to cut down on long circulation lines. In live-mode it can be used to charge, discharge, renew, register and modify patrons. In off-line mode it can everything except modify patrons. It has been in testing in a number of academic libraries and the comments were very positive.

2003.1.4 Hold Enhancements

SAILS installed 2003.1.4 in order to be able to use the large number of hold enhancements included in this release. The network hasn't implemented all of these enhancements but we will be having a HOLDS summit on April 12th at 10 a.m. to go over these features so we can begin to use them.

• RHA (known as the On-Shelf Holds Report) has been substantially revised. The searching algorithm was rewritten to increase randomization so that libraries are not always selected to fill holds. It has also been modified so that if a report is printed and then a higher priority hold is placed before a

hold is trapped that higher priority hold will be filled first. In other words, if your library has a copy that is flagged to fill a hold at another library and in the meantime one of your patrons places a hold on that title your patron's hold will be flagged at the trap hold wizard. The report has been modified to take into account closed dates for a library so that a hold won't be flagged to be filled by a library when it is closed. This is going to be a great help when schools close for vacations. Finally, a library's individual RHA can be emailed to them if the library's patron record has an email address. For those of you who have the report al-

ready emailed to you, you know you get the entire report. We will make the change for those libraries before March 15th but we encourage all libraries to consider this option.

• Clean Holds Report – we requested a software patch that will allow us to email this report to those libraries that have an email address in their library patron record.

Blanket holds have been improved. SAILS will be requesting that this feature be turned on and we will be looking for volunteer libraries to test this feature for placing holds for book clubs or teachers.

"your library has a copy that is flagged to fill a hold at another library . . . your patron's hold will be flagged at the trap hold wizard."

GL 3.0 Hold Enhancements

One year ago the Consortia Special Interest Group (SIG) conducted a program on holds in a consortial environment. Richard Shurman from a large consortium in suburban Chicago and Debby Conrad were the presenters and the program ended with a 20 minute strategic planning session on features consortia customers really needed to make holds work. Following that meeting Richard and Debby posted enhancement requests to the Sirsi enhancement forum for consortia. An ability to suspend holds was the result of one of those requests and Sirsi is in the process of responding to all of the suggestions we posted.

● Suspend holds – patrons will be able to suspend their own holds in iBistro.

● Blanket modification of holds – The Java client will allow a batch edit so staff members can suspend all holds at one. They will also be able to change pick up location all at one time or in batches.

● Default expiration date – GL 3.0 will include the ability set a default hold expiration date. At the present time staff members have to remember to enter a date and there is no expiration date for holds placed in iBistro. This will work by specifying a number of days before a hold has expired. Debby has submitted an enhancement request to allow this default to accept an actual date for school members that do not want holds to continue in the system after the school year has ended.

● Hold shelf expiration date – GL 3.0 will include the ability to define by library how many days an item will sit on the hold shelf before a hold expires. A hold expiration notice can then be emailed or mailed to the patron. We are going to be submitting another enhancement request that a note be added to the patron record noting the item was not picked up in time.

● Display Hold Count Helper - will provide specific hold counts for a title based on the type of count, hold level, and the specified library. The Display Hold Count Helper will display a count of holds for patrons at your library, patrons within your hold group, & remaining holds within the system. The helper will also display a count of holdable copies owned by your library, owned by your group, and owned by the system. According to the demo, it will be very easy to identify your own library's patrons that are in the holds queue.

"it will be very easy to identify your own library's patrons that are in the holds queue."

RFID—Ready for Prime Time

Are you thinking about RFID technology?

•RFID stands for Radio Frequency Identification. "Librarians everywhere are closely watching radio frequency identification (RFID) technology. An advance over using barcodes on library materials, RFID tags are being touted as a way radically to redesign how library materials are checked out and handled."
- Netconnect supplement to Library Journal,Fall 2004.

I was able to see presentations from 4 different libraries on how they have incorporated this technology. One library reported the following return on their investment after attaching the RFID tags to their materials and installing the readers.
•Users can now experience complete self service
•Books get checked in immediately
•Books get back to shelf much faster
•Patrons get hold items much faster
•Eliminated chance of repetitive strain injury for staff

Many RFID vendors such as Checkpoint are also SIP2 Certified with SIRSI, which means that their products work in tandem.

Although RFID Technology can be very expensive it could prevent you from having to add more Staff, and or significantly change the workflow of your current staff. One li-

Popular Companies offering RFID

RFID—Ready for Prime Time

brary purchased a sorting machine that is attached to their book drop. What took the staff members two hours to check in was completed in 18 minutes. This was accomplished by the following.

•Checks in, desensitizes, and sorts around 3,000 items per day

•Sorts are based on home locations and allow sorting by feel

–Bin 1 Holds or other alerts, prints out hold slips

–Bin 2 Adult fiction & Pre-school

–Bin 3 Adult nonfiction & AV

–Bin 4 Youth and Young adult

–Bin 5 Problem items (ILL, no tag, not checked out—need manual check-in-

If you would like to ask questions to libraries that have already installed this technology please contact Steve for a list of contacts that are willing to share their experiences. It's always nice when you can learn from other peoples misfortunate mistakes.

"What took the staff members two hours to check in was completed in 18 minutes."

The Library User Persona

In 1999, Alan Cooper wrote a groundbreaking book "The Inmates Are Running the Asylum" which discussed the need for information professionals to design user interfaces that actually meet the need of the user in the context in which they are using the system. In other words, a person can respond to different interfaces depending upon the need at the moment or the use of the system. This is known as the user's Persona. Mary Lee Kennedy, Dean of the Harvard Business School Library, is heading up a research project funded by Sirsi to point out to some significant differences in information use both in terms of generations and in

terms of location (urban, suburban, rural). Researchers already know that there are a variety of psychographic needs met by information in public library settings. Her hypothesis is that if we align our interfaces more closely to our user profiles we will be more successful at delivering information to make their information and library experiences and their lives better. Her research group will be conducting focus groups with patrons to better understand how they want to use information on their desktop and other electronic devices. SAILS has been invited to participate in this project and Debby Conrad had the oppor-

tunity to meet with Ms. Kennedy to discuss her project during Superconference. The tentative date for the focus group will be April 9th. We will be looking for about 20 participants ranging in age from 19 to 65. Each focus group member will be paid a $50 honorarium for participating in the meeting. Sirsi is sponsoring this study and will be providing the funds for the honorarium and any related expenses. We will be posting a request for volunteers on our website so if you know anyone who might be willing to spend a morning at SAILS let them know.
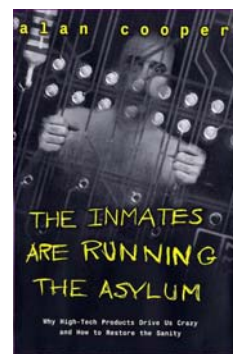
Heard of SVA?

SVA stands for SIRSI Voice Automation. It is a convenient, automatic way for your library to contact users without spending staff members' time. In addition, SVA enables your library to provide patrons with an additional means of around-the-clock access to the library via telephone. Using SVA, library users can review personalized account information, renew items, and check library notices:

- Hear checked out materials Renew materials
- Check on overdue materials
- Change PIN
- Hear library announcements
- Hear fines

SVA's inbound calling capabilities ensure that no matter what their work shift or school schedule, patrons may call your library to renew library materials or get information anytime it's convenient.

To keep personal information secure, the library has the option of assigning each user a personal identification number. After punching in a PIN, the user may choose from several menu options that are set by library staff.

In addition to providing lists of items currently checked out to an individual user, holds available for pickup, and lists of overdue items or bills, your library has the option of recording messages (in more than one language, if desired) about library policies, hours, and events. In the event that certain materials cannot be renewed, the user is advised that those titles have not been renewed and is reminded of each item's due date.

Another product which can help your library conserve valuable time, money, and human resources.

bluesocket

One of the great benefits of being able to attend Sirsi Super Conference 2005 is the fact that I was able to find out what other libraries across the nation are doing to keep up with the ever changing technology. I was amazed to see the amount of libraries that are already offering Wireless Internet access to their patrons.

SIRSI started to research Wireless access in libraries over a year ago. They partnered with a company called Bluesocket and have been working with then to design their product with the library in mind. For those of you that have ordered the Print and PC management software from EnvisionWare you may be familiar with the term SIP2. If a third party company is SIP2 compliant then their product is able to work in tandem with the SIRSI software. The Bluesocket device is able to authenticate against the SIRSI database to verify that a Patron belongs to a library and is in good standing.

The Bluesocket device is a piece of hardware that would sit at you library next to your Telecom equipment. The software on the device is configurable so that when a Patron enters the library with a wireless device it will automatically associate with the libraries web page, customized for authenticating. You could then require the wireless patron to enter his or her library card number and PIN and allow them internet access based on their patron profile. The device also has reporting capabilities so that you are able to report on the amount of wireless usage at your library.

One of the major benefits of the Bluesocket device is that you are able to limit the amount of bandwidth that a Wireless patron may use. Bandwidth is the rate at which information can be sent through the internet. The greater the bandwidth, the more information that can be sent in a given amount of time. If Bandwidth is not limited and carefully monitored then it is possible for 1 wireless user to use a large amount of Bandwidth to download large files from the internet leaving the rest of the users on the same network spinning their wheels. With Bluesocket you can allocate more Bandwidth to the staff then you can to the Patron.

For more information about Bluesocket please contact Steve at extension 12.

"The device also has reporting capabilities so that you are able to report on the amount of wireless usage at your library."

Cataloging & Acquisitions in GL 3.0

The Workflows Java Client (GL 3.0) will have a completely new look and feel. The client will be easier to navigate then the current client and the layout is much better. You will be able to see all the tabs on one screen without have to click on the >>. You will be able to add and edit call numbers, add items and delete items from the same screen. You will have more options to customize Workflows, such as being able to change the font settings, without having to restart Workflows. Display changes go into effect immediately.

You will now be able to sort your search hit list by clicking on the Column headings. You can also adjust the size of the columns.

There will be helpers available that will allow you to customize your display. Some options are to view circulation information, MARC view or descriptive view of records.

Every toolbar in Acquisitions has been modified. The view of information has also been enhanced to allow for viewing of multiple vendors, and all of their pertinent data, including tabs for Amounts, Averages, and Quantities. You get a complete snapshot of all the information in one place. Alternatively, if you only wish to view a single vendor, you may do so as well. Modify, Create, and Duplicate vendor have all been wizardized. They are much easier to use and all the different tabs display on one screen. You do not have to click OK to get to the next screen.

New Functionality:
Segments are displayed and manipulated in two panes. You now have the option to receive all items on an order. Instead of receiving them one item at a time. it will be possible to place a hold on on-order material even when there is no item record.

Please take a look at screenshots of the next generation of Workflows:
http://www.sailsinc.org/manuals/GL3.pdf
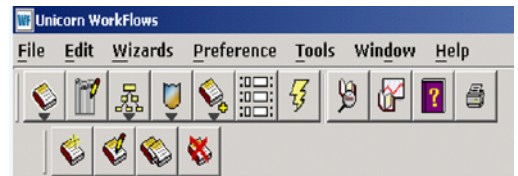
New Cataloging Toolbar

New Acquisitions Toolbar