SAILS Network News

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Unicorn 2002 Circ Enhancements

New Helpers for Displaying or Printing Complete Item or User Record:
New helpers have been added so that the entire user or item record may be printed from a single screen. Prior to this change, it was not possible for all of the folders of item information that displayed using the Item Search and Display wizard or all of the folders of user information that displayed using the User Display wizard to be printed or viewed on a single window. With this change, a display / Print All Tabs helper displays as a printer icon on both of these wizards.
• Item Search and Display Wizard
• User Display Wizard
Once the helper is selected, the complete item or user record displays. The scroll bar can be used to page through the data. The user has the option to

select Print to send the item to the user's default workstation printer, or cancel to
close the helper.

**Checkout Wizard Can Print List of
Patron's Existing Charges**
The Checkout wizard has been enhanced with a new property to allow the printing of a user's existing charges on a checkout receipt. With the new Print List of Patron's Current Checkouts property, the Checkout wizard can print the user's existing charges in ascending order by date before printing the items being charged in the current checkout. The Print List of Patron's Current Checkouts checkbox displays on the Defaults tab of the Checkout wizard's Set Properties window. This checkbox can be selected only when the Print Date Due Slips, Print Charge Receipts, or Print Accountability Receipts radio button is selected. By default, the Print List of Patron's Current Checkouts checkbox is disabled

**Discharge/Checkin Wizard Displays Hold
Comments at Discharge**
The Discharge/Checkin wizard has been enhanced to include hold comments in the routing window when an item is checked.

**Dates Display in Correct Format in the What's In
Transit Wizard**
In the What's In Transit wizard, dates were appearing only in the YYYYMMDD format instead of the expected display format. The What's In Transit wizard has been corrected to display the date in the configured date display format.

Clone/Copy Next Step Button Displays
After Registering a New User If the default user profile is changed while a new user record is being created with the New User Registration wizard, the Clone/Copy to New User next step button does not display on the Complete window when the user record is saved. The New User Registration wizard has been corrected to show the Clone/Copy to New User next step button when the user

record is saved and the Complete window displays.

User ALERTS Display Inconsistencies Corrected
The following changes have been made to the User ALERTS messages which display when an ALERTS glossary appears on a user record. The changes have been made to make the information displays more consistent.
• The glossaries on the User ALERTS screen have been standardized to use bold text.
• The privilege expiration field has been expanded to prevent the truncation of the "User privilege will expire [date]" alert.
• Alerts only display if necessary. Previously, the alerts "User has unpaid bills," "User has overdue items," and "User has claims returned," would display even though the user had no unpaid bills, overdue items, or claims returned items.
• If the staff member forgets to enter dollars and cents when paying bills from the unpaid bills glossary, the system message "Cents field must contain 2 digits" displays. Previously, this message displayed as "#BACents field must contain 2 digits."
• The "User privilege will expire [date]" message does not display after the privileges have been renewed using the glossary. Previously, this message continued to display after the privileges were renewed.
• The Extend Privilege next step button label capitalization has been standardized to use initial capital letters.

Trap Holds Wizard Checks Item Status Before Routing the Item
The Trap Holds wizard was experiencing an error in which an item would be routed to the holds shelf instead of going into transit to another library to satisfy the next hold in the queue. The wizard was making the item available first instead of checking to see where it was needed next.
The Trap Holds wizard has been changed to check the status of the item first to see if the item is needed at another library. If the item is to go into transit, the library staff member is prompted to put the item in transit. If the item goes into transit, the Trap Holds wizard will not make the item available until it is taken out of transit at the hold's pickup library.

Total Number of Holds No Longer Truncated
If a staff member displayed the total number of holds for an item, the total number of holds was truncated to two digits. Example:
If the Display Item Holds wizard was used to display a list of holds for an item, and if the item had 158 holds on it, the total number of holds was listed as 15.
The holds information display has been corrected to show all digits of the number of holds for the item.

Unicorn Incident Priorities
There are times when you submit an error report to SAILS and we respond that we have to contact Sirsi. We will typically open up a call with Sirsi via email. Once they have received the email, an incident number and priority is assigned to calls. Sirsi has 4 Priority levels.

Priority 1 (P1)

Sirsi assigns a **Priority 1** to an incident if the entire system or a major piece of functionality has been rendered inoperative. Major functions include circulation, cataloging, the public catalog, and software upgrades. Sirsi accepts P1 calls during normal business hours, 7 am to 7 pm central time weekdays excluding holidays, and via our Critical Care service during all other hours. Sirsi makes its best effort to ensure that all P1 incidents receive immediate attention when they are reported.

Priority 2 (P2)

Sirsi assigns a **Priority 2** to an incident if it involves the loss of a non-critical application or function, and the entire system has not been rendered inoperative. A P2 may also be assigned to problems that are especially time sensitive or are highly impacting non-critical library functions. Sirsi works on P2 calls during normal business hours.

Priority 3 (P3)

Sirsi assigns a **Priority 3** to an incident if it does not involve the loss of an application or an entire set of functionality and the problem is not having a major impact on the operation of the library or the automated system. Sirsi works on P3 calls during normal business hours

PRIORITY 4 (P4)

Sirsi assigns **Priority 4** to incidents that are not time critical and/or are related to events that will take place at a scheduled time in the future.

The majority of the calls we open for you are Priority 2 or Priority 3 and they respond within 24 hours. Once they have resolved the issue, we will notify you.

FAQ: Is there a report that lists items users claim to have returned?

No. Unicorn does not have a report that specifically lists items that users claim to have returned. We can run a report and select ANY for the Date Claims Returned field. The report will show the item information and the user information for the user who has checked out the item.

Note: The List Charges report will find items the user claims to have returned *only if the item is still charged* to the patron
If you use the Claimed Returned Function and would like to receive this report on a regular basis, please contact support@sailsinc.org or call Debby Conrad (ext. 11)

Patron Compliments

"Thank you for this wonderful service. It has been a real boon to me. I am so impressed at the responsive service receive from Sails and the Wareham Library in particular."
~ *Wareham Patron*

"…what a great response we are having to the message you sent out for me last week, asking patrons to notify us if their e-mail address changed due to Mediaone! The changes are pouring in (to Marion!) along with comments about how much they like the notifications!"
~ Robin Glasser *(Director - Norfolk)*

"Thank you for the reminder. This is the first time I've gotten one and I think e-mailing reminders is a great idea!"
~ *Norfolk Patron*

SAILS Patron Complaint Policy

Purpose - to provide a method for patrons to submit complaints to the SAILS board about SAILS network policies and procedures.

The board of the SAILS Library Network will respond in writing to your complaint within 45 days of receipt. The board policy will only respond to issues that relate to network policy and not to policies established by individual member libraries.
Steps:
1. Each library will have a supply of Patron Complaint Forms.
2. A patron with a complaint about network policy must complete a written Patron Complaint Form to the library that has issued his/her card.
3. The library director should review the complaint to make sure that the complaint doesn't pertain to library policy rather than network policy.
4. If it is a valid complaint, the written complaint form should be sent to the Executive Director of SAILS.
5. The Executive Director will send a copy of the complaint to the SAILS Board.
6. The SAILS board will consider the complaint at its next meeting. A written response will be mailed to the patron.
7. If the patron is dissatisfied with the response, they may request an opportunity to speak to the board. The board will set aside time for public comment at the beginning of its next meeting. The SAILS business meeting will convene following the public comment period.
8. The SAILS board will decide how to respond to the patron at its next meeting and will submit its response in writing to the patron. That decision will be final.

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Upcoming Training

Beginning Cataloging
04/10/02: 1 p.m. to 4 p.m. (Full)
05/07/02: 9 a.m. to 12 p.m.
SAILS Training Room

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

Upcoming Meetings

PubPac Meeting
04/02/02: 1:30 p.m.
SAILS Meeting Room

Long Range Planning Committee Meeting
04/05/02: 9:30 a.m.
SAILS Meeting Room

Tech Services Meeting
04/09/02: 10 a.m.
SAILS Meeting Room

SAILS Board Meeting
04/16/02: 10 a.m.
SAILS Meeting Room

Bring SAILS Training to Your Library

From the **SAILS website**, Directors may request SAILS staff to visit your library to perform on-sight training for your staff. This is especially helpful to those libraries that have a hard time sending people to training at the SAILS offices.

The topics include, but are not limited to:

➔ Beginning Circulation
➔ Reserve Desk
➔ Reports
➔ Long-range planning or budgeting for technology
➔ Meeting with trustees, school administrators, town administrators
➔ Basic & Advanced Cataloging
➔ Community Organizations, serials & Newspaper articles
➔ Customer Service Issues
➔ Basic & Advanced Searching