SAILS Network News

Library Network

May 2002

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Enhancements Survey Results

The following responses were created from the requests and questions SAILS received on the Enhancements Survey. SAILS received survey submissions from the following departments:

Circulation: 25
Directors: 11
Tech Services: 8
Reference: 8
Technology Coordinators: 2

Circulation Enhancement Requests

Using patron's birthdate to identify a patron from several possible matches.
Answer1: It is network policy not to ask patrons for their year of birth. You can enter their month and day of birth in the birthdate field. If this policy is to be changed, that change must come from the Board.
Answer2: At the present time we do not have control over what info is displayed in the popup window when you click on the patron barcode in a list of patrons. I will submit an enhancement request to have the birthdate field included

Problems with lost book and billing procedures.
Answer: SAILS has submitted a long enhancement request to clean up the lost book procedures. We will be talking to Sirsi about this at UUGI but nothing has been scheduled for the next Unicorn release pertaining to this.

An automatic message when a patron's holds has been cancelled because they have not picked it up on time.
Answer: SAILS has submitted an enhancement request to Sirsi asking that the system automatically cancel holds after items have been sitting on the Holds shelf list for a specific length of time and that a message or status be entered in the patron record. We have some contractual language that may allow us to get this taken care of in Unicorn 2003.

"Alert" sign needs to disappear when the problem is correct. You should not have to go out of the patron's record and go back in to make sure the "Alert" has been taken care of.
Answer: The system will not update any record until it has been closed.

List last user in case of problems when item is returned.
Answer: The Last User is retained in the item information. You can view it using item search and display.

When an item is checked out and there was a previous charge that was not checked in, the previous patron's record should be cleared and the item checked in.
Answer: There is an option we can set to take care of this. We could not do this when libraries were using Rental patrons but we are experimenting with it now and if there are no problems, we will set this option to work by June 1, 2002.

Eliminate alert at check-in if item is overdue.
Answer: We are looking into this.

Not to count in-house uses for circ stats.
Answer: This has been fixed. The May statistics will

not include in-house patrons.

An easy way to check a patron's telephone number when placing holds.
Answer:
1. Turn on the Confirm Address helper in the Place Hold Wizard.
2. Select the Place Hold wizard.
3. Scan the user's library card.
4. Select the title for the hold.
5. Select the Confirm Address helper button to confirm or update a user's address.
6. Select OK, then the Place Hold button
7. Continue the hold placement process.

Ability to track number of uses of a title at a certain library rather than system wide.
Answer: The system does not track circulation information this way. We will submit an enhancement request for this functionality.

More bells and whistles for alerts (we received a number of requests for this type of functionality).
Answer: A number of Sirsi sites have requested this. As far as we know, it is not included in Unicorn 2002 but we will monitor prerelease documentation.

Limit the number of holds that can be placed by patrons.
Answer: There is a limit on the number of holds a patron can place. Adults and senior citizens may have 20, juveniles can place 10, and staff can place 30. The SAILS Board approved these limits.

Improve response time in searching/patron lookup.
Answer: Some of these problems are related to telecommunications and some to system response time. Sirsi has made a few changes to improve response time and we will monitor it. Some sites are slow because we have to update their telephone line.

To be able to declare patron's card Lost.
Answer: If you want to use a lost card procedure as opposed to replacing the patron's barcode, you need to duplicate the patron's record with a new barcode, and give the lost card a profile of LOSTCARD. The LOSTCARD profile has no privileges and cannot be used.

When you look up a patron by name, if the name is not spelled exactly, you cannot find it.
Answer: Our recommendation has been to enter the surname and first three letters of the first name in order to view the patron list.

When typing in a library name when searching for an item, it takes too long.
Answer: Sirsi loaded a software patch to improve the response time on this. If you continue to have a problem, please send email to support@sailsinc.org.

Difficulty placing multiple holds on a subject search.
Answer: We will review this at the May Circulation meeting so we can see exactly where the problem is. We will then discuss this with Sirsi.

Mark items used feature is not really useful.
Answer: This function is really intended to update an item's use count for weeding purposes.

Workflow is too slow.
Answer: If you are referring to response time, we are working on some issues but telecommunications line speed remains a factor. If you are talking about the entire process, we are working on several in-house improvements that may make things go more smoothly at the circ desk.

Cannot do several things on one patron's account without re-entering their barcode for each transaction.
Answer: You only have to enter a patron's barcode one time to check out, place holds, pay bills, etc. That patron becomes the current patron and if you check the current radio button, you can continue with whatever needs to be done. You do not have to re-enter their barcode.

Searching/iBistro Enhancement Requests

Patrons have difficulty finding the call number in iBistro (many requests for this to be improved).
Answer: The correct call number was supposed to display with the newest release of Unicorn. SAILS has been looking into this issue with SIRSI, but for now, it is displaying the call number for the first copy added to the system.

iBistro's "Saved List" is confusing to patrons (many requests for this to be improved).
Answer: There has been much discussion on SIRSI's enhancements forum about this issue. Many people would like to see:
- This list become a "shopping basket" for patrons to place holds
- The list be retained over multiple searches

Patrons can't place multiple holds in iBistro without entering in their patron information over and over.
Answer: This happens only at the library, where the library logs into iBistro at the start of the session. This is for security reasons. If the patron forgets to log out of iBistro, their record is available to all patrons using that station.
At home, the patrons log into iBistro at the start of the session, using their own barcode and PIN. They are not prompted to re-enter this information when accessing their account or placing holds.

"Just for kids" should be library specific.
Answer: On the SIRSI forums it has been suggested to include a text search to these pages, similar to the "quick search" on the iBistro home page. Since each time a patron clicks on a picture, to narrow down the search, the system is performing an individual search. To make this library specific, thousands of searches must be modified in each library's iBistro. SAILS does not currently have the resources to make this change and will need to wait for SIRSI to implement this feature.

It takes a lot of time to find holdings from your own library.
Answer: In either iBistro or WorkFlows, you should be able to narrow your search by selecting your library from the drop-down list on any of the searches.

Would like to be able to search other networks.
Answer: Since SAILS is now an active member of the Virtual Catalog, you are able to search multiple catalogs, including; CLAMS, FLO, MBLN, MLN, and the UMASS colleges. Just log into the Virtual Catalog from this page:
http://www.sailsinc.org/circ/VirtCatSearch.asp

Put video search on home pages, not just advanced search.
Answer: This is a feature, which will soon be added to iBistro. All of the materials specific searches will be separate links, available on the top navigation bar.

Need Museum Passes sorted by title with all holdings attached to the same record.
Answer: It is not currently possible to sort these lists in iBistro. This is also the issue with the New Books lists. We have been looking into a way to make this sort, but have not been successful. Many other SIRSI customers have also asked for this to be available.

The museum pass records are library specific. This was set up so libraries would be able to enter library specific notes in the record.

Change of address system on the staff side is particularly cumbersome. Is there some way to streamline the process?
Answer: We are in the process of changing the way the requests are distributed to the libraries. The requests from your library patrons will soon be appearing in your finished reports list, in circulation. The processing of these requests has not changed. You will still need to use the WorkFlows requests module, although these wizards may always be added to your circulation toolbar.

Large type should be indicated in holdings list.
Answer: This is not showing in WorkFlows because the majority of people recently polled, requested to have the Author display in the holdings over the Physical Description. We only have the option of displaying 2 fields in the results in WorkFlows. In iBistro, you are able to see the Title, Author and Physical Description.

Eliminate "What People are Reading" from iBistro.
Answer: The option of removing "What People are Reading" from iBistro is available to individual libraries, but would display when the patron logs in at home and at other libraries, where the feature is available. The request to remove this feature must come from the library director.

Cataloging Enhancement Requests

Using Call Number prefixes: REF should be part of the Call number not just in the location
Answer: SAILS does not have a policy regarding the entry of prefixes in Call Numbers. This is up to library if they choose to use them in their call numbers. We do suggest that libraries use prefixes like REF but again it is not required.

Need to improve series searches especially for readers who want to follow sequences of series.
Answer: The system searches for the series in the 440 series field and the 490 series field. If you have trouble finding a series in the system it could be because of the way the data entry was done on the record. If the series does not appear in either of these fields then the series search will not work.

Would be nice to have a template to use when entering a set of books that have the same information so you don't have to retype the same information any times.
Answer: Instead of template, you could use the duplicate title wizard. You would have to create the first book of the set but then you can use this wizard to duplicate the record. Then you would just have to edit the title and any other information that may be different from the first record. It is the called the Duplicate Existing Title Wizard and it is located with the Title Maintenance group of wizards. If you need specific instructions on using this wizard they will be posted on the SAILS Web site in the cataloging section on Friday May 10th.

Would like to see the titles that are on-order so that staff may see what is on-order and have the ability to place holds on them.
Answer: SAILS is currently working on a solution for this. Right now there is a problem getting these records to print out on the Cataloging Request report after they have been updated when the library has received the book. We will notify you as soon as this is possible.

Call Number can only be entered in upper case letters.
Answer: Call numbers are entered in upper case letters so that the system can sort them correctly.

Serial Module defaults to the oldest record when editing copies and set the wrong price for items.
Answer: The Serials Module does not store copy information. The Serial control record acts as a link between the title in the catalog and any issues received for that title. Copy information must be edited using either the Edited Existing Call Number/Volumes wizard or the Edit Copy Wizard

The problem with the oldest copy displaying first sounds more like the call number is sorting with the oldest first. Call number sorting depends on how the call number has been entered into the system. In the serials module, the system wants the call number to be the Enumeration and Chronology. If this is used as the Call number and the classification is Deweyper then it will sort with the newest issues first. If you enter your call number in a different format then you could have difficulty getting the call numbers to sort in order.

If the system is giving you an incorrect default price for your magazines then the holding code that was setup for your library we you started using serials

could be incorrect. Also, if the location, Item Type, or other copy information is not correct for your magazines then it is probably the holding code. If you believe this is the case let us know. It takes about a day to fix and then all future copies will have the correct information.

Large type should be indicated in the holdings list
Answer: Yes, we think that would be a good idea also. SAILS does not require that information to be in the Call Number or Copy. Please keep in mind that from the database merger there are some records where the large type and the regular print books ended up on the same record. If you find a record like this please let SAILS know immediately so that we can fix it.

Is there a way to Discard an item without having to remove the fines or lost payment from the patron's record?
Answer: Unfortunately there isn't a way to do this. The bill is attached to the item record and not to the patron's record. So if you try to discard an item that has a bill then the item stays in the system until the bill has been paid or cancelled.

After validating authority, scroll bar should default to the top of the screen so you don't have to scroll to get to the volume.
Answer: This may depend on where you are in the record when you click on the validate wizard. Try scrolling to the top and then click on the validate wizard.

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STAR 2002 Exposition

On April 24, 2002, Barbara Bonville attended the STAR 2002 Statewide Training and Resource Exposition in Boston. Over 500 vendors are on the state bid list exhibiting their products and explaining about their companies. This exposition was most beneficial. While she got to meet many of our current vendors such as ASAP and LAN-TEL, she also got to meet many new vendors of whose services we could avail ourselves.

There was a training session concerning the State Surplus Purchasing Program, which was interesting. The training session on terrorism was very well attended. Most interesting in this presentation was the fact that large communication centers may be targeted. The security of these sites depends on Verizon. SAILS will not be a target. Being individual site, the network does not appear to be in the terrorists' big picture. The network disaster plan is in place. Our site is secured, alarmed and monitored – three things the trainer said should be done. However, there is not much the network can do to control the security of our lines except by securing the lines entering our building, which we do.

She was able to obtain information on the State's PC Big Buy to take place this summer. If someone is interested, she can give you the names, numbers and e-mail for vendors on the list. SAILS will not be coordinating a pc purchase this summer. Libraries will need to contact vendors directly. We will assist you in determining the appropriate configuration for your library.

"The Research Wizard Experience"

This is a great idea from Computers in Libraries 2002, which could be implemented by a web-savvy staff member. Karen Hein, the Reference and Electronic Services Librarian at the University of Nebraska at Omaha, has revamped the pathfinder to be updated automatically and even link to their online catalog and databases. Basically it gives a simple web interface for reference staff to draw together and create online links to websites, database articles, and applicable information in the OPAC.
If any libraries would like to get together and work on this project, SAILS would be willing to act as a technical advisor, and give disk space on our web server.
Complete information available at:
http://apocalypse.unomaha.edu/cil/, including the code for their free product.