

## SAILS Circulation Meeting (REQUIRED)

January 10, 2006

9:30 a.m.

SAILS Meeting Room

Notes

### Introductions

Placing holds - searching into iBistro = create new library called OUTSIDE? and description of please select pickup location

Laurie discussed that there are circumstances where patrons are coming into iBistro from outside services and then the system defaults to SAILS as a pickup. There was some discussion about how to avoid this. \*please note that Laurie has changed the description for SAILS to say –Please Select Your Pickup Location—so this issue has been resolved.

Overview of Claimed Returns procedures – We discussed the use of the Claimed Return form on the SAILS Website located under Circulation – Forms

(<http://sailsinc.org/forms/ClaimsReturned.asp>) and the new procedure  
<http://sailsinc.org/Sirsi/TipClaimedForm.pdf>

Overview of Missing in Transit procedures – We discussed the purpose of the new procedures and again reviewed the form and policy.

<http://sailsinc.org/forms/MissingTransit.asp>  
<http://sailsinc.org/Sirsi/TipIntransitForm.pdf>

It was noted that if a library experiences a problem getting something resolved they are to contact the SAILS office. Also, it was pointed out that SAILS is monitoring libraries to ensure compliance.

Overview of Unfillable Holds procedures

This was discussed with some question about being able to substitute. The difficulty is that holds are title specific and items attached to another bib record can't be substituted.

<http://sailsinc.org/forms/Unfillable.asp>  
<http://sailsinc.org/Sirsi/TipUnfillableForm.pdf>

Top 10 policy problems

### TOP 10 PROBLEMS CIRCULATION PROCEDURES OR POLICIES

1. Incorrectly setting an item to lost while billing a patron for a claimed lost item.  
\*Staff must use the Mark Item Lost Wizard or libraries can wait for the Assumed Lost Report to set items to lost and bill patrons. There is a new manual on SAILS reviewing the process to set items to Lost or Missing.

- <http://sailsinc.org/Manuals/ManagingLostItems2003.1.4.pdf> Failing to follow these steps result in item database errors on patron records.
2. Not setting items in transit at check in \*Staff MUST click on the Put Item In Transit Button.
  3. Not picking the correct patron for check out or holds – done when doing a name search instead of using a library card or checking items out to a school patron card \*If a library doesn't require a patron to present a card they should search by patron's using telephone number instead of name.
  4. Renewing items too many times \*Make sure your properties are not set to RENEW ALL and staff should be reminded not to abuse staff privileges by renewing items with holds or an excessive number of times.
  5. Not deleting finished reports after viewing
  6. Not checking for address changes when card needs to be renewed and not updating a patron record with the correct library and user category2 when a person has moved.
  7. When overriding a hold at checkout, canceling the hold instead of selecting Override and Checkout item.
  8. Not notifying a patron of their pin at patron registration \*It was noted that if a patron changes their phone number it is prudent to ask them if they also want their pin changed.
  9. Setting the wrong date for the bookdrop checkin
  10. Not checking something when prompted for Multiple pieces.

#### Organizing Workflows Tips

There was discussion about how SAILS can organize the Workflows Tips. The topic will be included in the subject line of the email and the Tips are going to be organized by general topic.

Checklist for training new staff – The recommended list of skills to cover are attached to this document.

The circ map – what it means and how to view it for your library – we reviewed the SAILS website with the list of individual Circ Maps. It was pointed out that a library's circ map may include item types not used by that library but it is to accommodate items coming from other libraries.

<http://sailsinc.org/circ/circmap.asp>

Contacting other libraries – finding contact information

Please check your contact information on the SAILS website

<http://sailsinc.org/network/MemberEmail.asp>

Dates & locations for spring circulation roundtables

Southworth Library (Dartmouth) – April 27

Carver Public Library – May 2

Norfolk Public Library – May 9

Open forum – things you would like to see the Sirsi software do (submit your ideas to [dconrad@sailsinc.org](mailto:dconrad@sailsinc.org) by January 5<sup>th</sup> for compilation

Not requiring # of pieces override at checkout – under discussion at Sirsi to accommodate self-check stations.

Displaying email info when hold is flagged – not possible and not of much interest to other Sirsi sites.

Use of scrolling mouse – Available now with special software (please contact Laurie) and generally available with the next release.

Print holds slips in bookdrop checkin – Available in the next release

Fine exempt check-in – available in the release SAILS will be installing this year.

Local control of library calendar – Planned for the release coming this year but perhaps not. More info is needed from SirsiDynix.

## **Circulation Training Checklist**

**Below is a checklist of topics you may want to cover when training new staff on how to use the Unicorn Circulation Module. This is only and outline of functions available in the 2003.1 release, organized in the same structures that Sirsi uses for their official circulation training sessions. If your library has decided not to use a particular function, simply delete it from the checklist.**

### **User Information and Maintenance**

- Overview

<http://sailsinc.org/sirsi/Getnsrtd.pdf>

- WorkFlows navigation
- Using online Help
- Menu commands
- Keyboard navigation
- Wizards
- Wizards via function keys
- Gadgets
- Toolbar navigation
- New User Registration Wizard
  - Be Sure to Use the SAILS Patron Registration Manual - <http://sailsinc.org/circ/PatronReg-Public.pdf>
  - Basic tab
  - Privilege tab
  - Demographics tab
  - Addresses tab
  - Extended info tab
- User Display Wizard
  - Lookup user
- Modify User Wizard
- Renew Privilege Wizard

- Copy User Wizard
- Send User Message Wizard
- Confirm Address Wizard
- Remove User Wizard

## **Standard Circulation Functions**

<http://sailsinc.org/circ/circmanual.pdf>

### **Checking Materials Out and In**

- Overview
- Record Structure
- Checkout Helpers
- Checkout Wizard
- View Checkout Information from the User Record
- View Checkout Information from the Item Record
- Discharge Material
- Pay Bill Now
- Renew Material
  - Renew single item
  - Renew user charges

### **Fines, Fees, and Payments**

- Overview
- Bill a User Wizard - Bill for a photocopy, Bill for damaged book
- Pay Bill Wizard

<http://sailsinc.org/circ/HoldsManual.pdf>

### **Holds and Recalls**

- Overview
- Place Hold Wizard
- Place Blanket Hold Wizard
- Trap Item Holds Wizard
- Modify User Holds Wizard
- Remove User Hold Wizard
- Modify Item Hold Wizard
- Remove Item Hold Wizard
- Suspend holds in Modify User Hold Wizard
- Suspend holds in Modify Item Hold Wizard

### **Item Information and Maintenance**

- Mark Item Missing Wizard

<http://sailsinc.org/Manuals/ManagingLostItems2003.1.4.pdf>

- Mark Item Lost Wizard

## **Special Circulation**

- Check In Bookdrop Items
- User Claims Returned Wizard
- Modify Due Dates Wizard
- Mark Item Used Wizard
- Ephemeral Checkout Wizard
- Check Item Status Wizard
- What's In Transit Wizard

## **Requests**

- Request Toolbar
- Use the OPAC to Request and View Replies
- Create Requests through the OPAC
- View Request Replies through the OPAC

### **Use WorkFlows for Requests**

<http://sailsinc.org/sirsi/PatronRequests.pdf>

- Display Requests
- Create Requests
  - Request tab
  - Basic tab
  - Reply tab
- Duplicate Requests
- Modify Requests
- Remove Requests

## **Circulation Reports**

[http://sailsinc.org/Manuals/Printing\\_reports.pdf](http://sailsinc.org/Manuals/Printing_reports.pdf)

### **Overview**

- Viewing Finished Reports
- Deleting Finished Reports
- Printing Finished Reports
- Processing items on the daily RHA
- Processing items on the Clean Holds Shelf Report
- Processing items on the In weekly Transit Report
- Processing items on the weekly Hold Shelf Report