Notes from Fall 2016 Circulation Roundtables

Commonwealth Catalog Update and Training/Tips

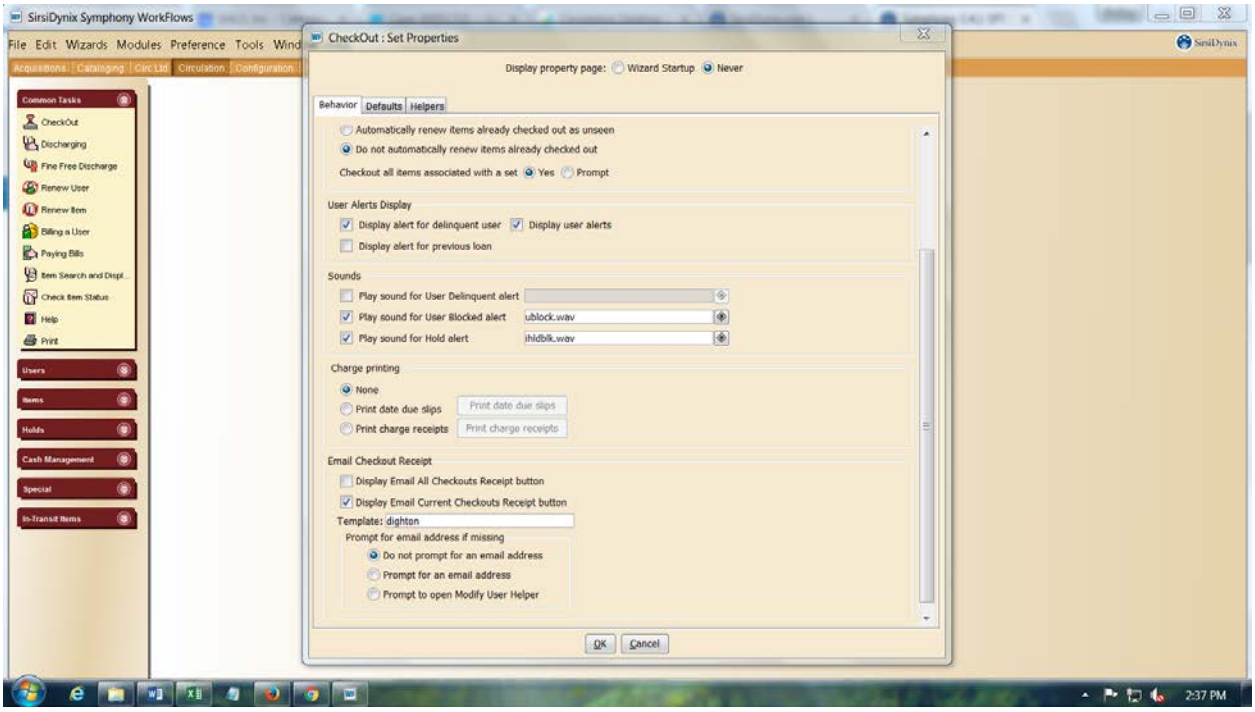
- In most cases if you encounter a problem you can't solve contact SAILS Support before opening a ticket with the ComCat Help Desk
- There are detailed documentation on the ComCat site after you log in. https://www.commonwealthcatalog.org/MVC/#home/1136|-1
- Here is a link to common solutions to common problems. https://flo.freshdesk.com/support/solutions/109094
- Common errors that you can deal with are:
    - Item can't be received because patron has too many holds. Most patron profiles can have up to 30 holds (more for staff, fewer for JUV and YA as well as some special purpose profiles). This can happen with any status of hold on the SAILS system – available, unavailable, and suspended. If it is impossible to remove any of the patron's existing holds to allow ComCat to receive the item, create a brief record in SAILS, place a hold for the patron with an override. You can return it to the owning library without it being received by you.
    - Item can't be received because it already exists in SAILS. Notify SAILS and we will remove the record and you can receive it. This can happen if something is set to IN TRANSIT in our system but was really returned in ComCat
    - Patron can't place a hold on an item because a copy is in SAILS but it really isn't holdable. Contact support@sailsinc.org and we will check it out. Then you can place the hold.

New Overdrive Website for Patrons – sails.overdrive.com

- SAILS has a new Overdrive site for patrons. They are going to have to log in with their barcode and pin the first time they use it. If they are affiliated with a library that has a Library Advantage account then they will be directed to that library's Overdrive site automatically and all the Library Advantage records will appear as part of the general collection.
- Patrons are now able to create wish lists and place holds from those items. It is easy to submit a request to purchase for titles not in the system. SAILS receives those requests monthly.

Workflows

- ***3.5.2*** SAILS is updating the software early morning 11/29. SAILS has sent out instructions on how to update staff clients. There are not a lot of changes with this release other than the ability to change the font size for the wizards but those changes will be on the computer and affect everyone who uses it.
- ***On Shelf Holds (see attached handout)*** The On Shelf Hold Wizard in circulation is now being changed so it is updated dynamically. Unlike the printed email RHA reports if you print your report of items needed to fill holds from the On Shelf Hold Wizard it will be real time – titles filled by other libraries will not appear on the list. SAILS has to continue printing the RHA at least once a day and will not be changing the schedule for now but all libraries are urged to begin using the On Shelf Hold Wizard instead.
- ***Email Receipts*** – There is a property to allow staff members to ask patrons if they want an email due date slip. A printed slip will print even if an email is generated. A template for the email has been set up for every library. Libraries that use this feature have received positive feedback from libraries. To set this up you must be logged in as TECH – Right click on check out. On the bottom of the behavior screen select Email Current Checkouts Receipt. Contact SAILS if you are not sure what to enter in the Template name field. You may also set this up to prompt staff to ask the patron for his/her email if it is not in the system.



Below is an example using the Dighton Public Library's template.

di@sailsinc.org via sails.sirsi.net 2:33 PM (4 minutes ago) Reply
to me, dkconradus

Conrad, Deborah K.,The following items are checked out:

Title	Author	Call Number	Item ID	Date Charged	Date Due
The haunting [videorecording] / Metro-Goldwyn-Mayer presents ; directed by Robert Wise	Jackson, Shirley, 1916-1965. Haunting of Hill House	DVD HAU	32034003938777	18 Nov 2016	25 Nov 2016

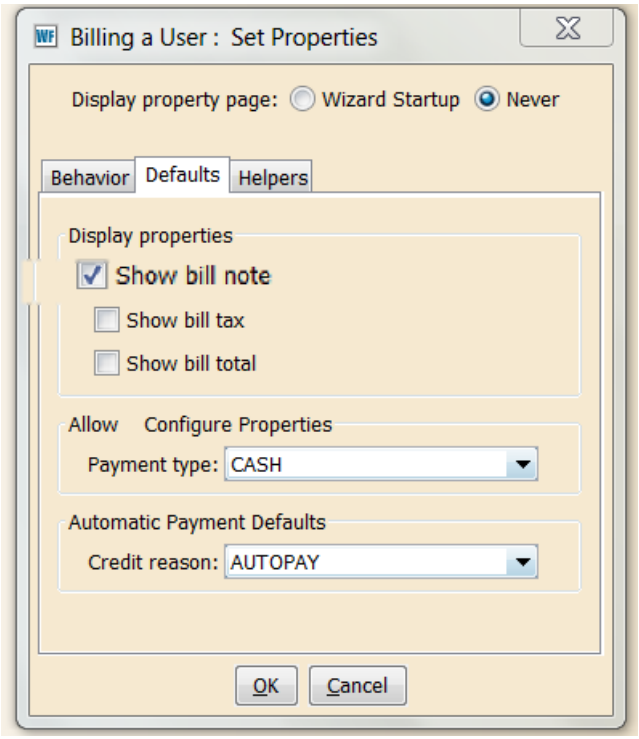
Please note that the list above may only include today's charges and not previously charged items. If you have any questions, please contact your library.

- ***Bill Notes*** – See Attached Tech Tip

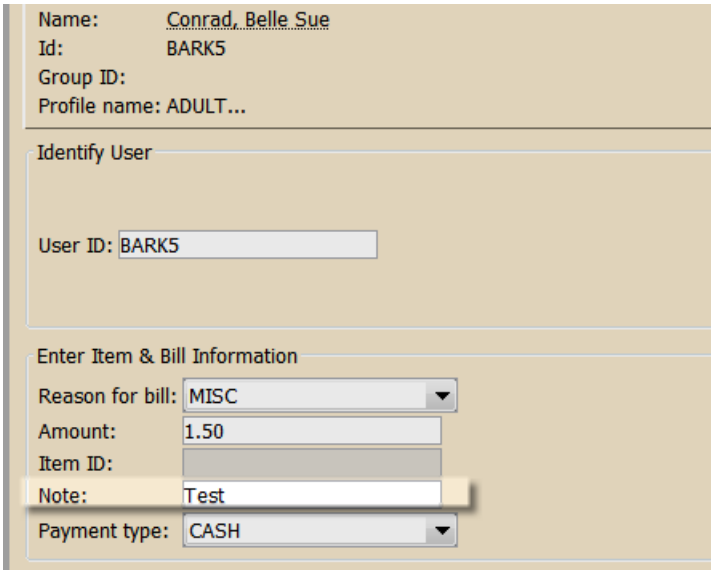
- ***Benefits of Clicking Right*** - Participants discussed the benefits of using the right click option to eliminate the need to go to a specific wizard to accomplish certain tasks.

Circulation Tech Tip – Bill Notes

TipIt is possible to add a note explaining a bill in a patron record. That note is attached to the bill itself. This has the advantage of not requiring a note or comment in the patron record which creates an alert at checkout and the note remains with the bill even after it is paid. This note would be used for special types of bills that are created by staff. To activate this feature log in as TECH. Right click on Billing a User. Click on the Defaults tab and check Show Bill Note.



When you create a bill on a user record you will now see the Note Field. You can enter a message explaining the bill.



The note will now display next to the bill.

Alerts

Name: Conrad, Belle Sue
Id: BARK5
Group ID:
Profile name: ADULT...

Identify User

User ID: BARK5

Street: 123 Main Street
City, state: Marshfield, MA
Zip: 02050
Primary Phone: 7818347036 VOICE
Email: dconrad@sailsinc.org

Enter Item & Bill Information

Reason for bill:
Amount:
Item ID:
Current: The haunting [videore... DVD HAU 32034003938777
Note:
Payment type: CASH

List of Bills

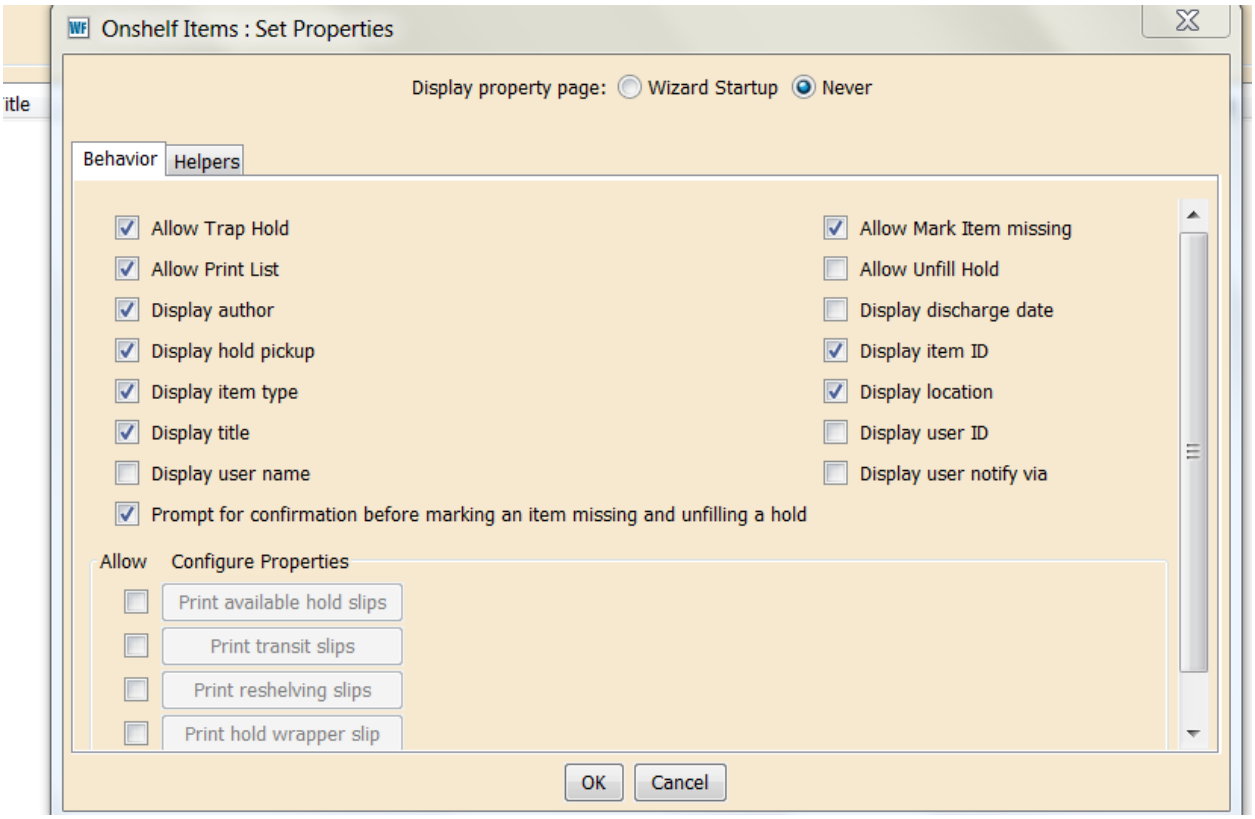
Title	Item ID	Reason	Billed	Bill Status	Note
		MISC	$1.50	Billed	Test
		MISC	$5.00	Billed	Test Bill

Circulation Tech Tip – On Shelf items Wizard

The Onshelf Items wizard is used to display items from the in your library on which there are holds. Rather than viewing the output of the RHA report from the finished report list or emailing the output to individual users, you can view the output from a single wizard on the Circulation toolbar.

You can select an item in list and perform these next steps: trap a selected hold or mark a selected item missing. The Onshelf Hold Items list is updated in real-time as holds are placed, cancelled, or suspended/unsuspended manually throughout the day. The Onshelf Hold Items list on the screen will be static until you refresh it. Once you refresh the screen, you will see any updates.

You can optionally print all items in the list. Before you begin using this wizard you should update the properties to determine what fields display when you print the list of items. You must be logged in as Tech. Right click on On Shelf Items. Click on Behavior. Select the fields you want displayed (note SAILS does not have the Unfill Hold option activated) Click on OK

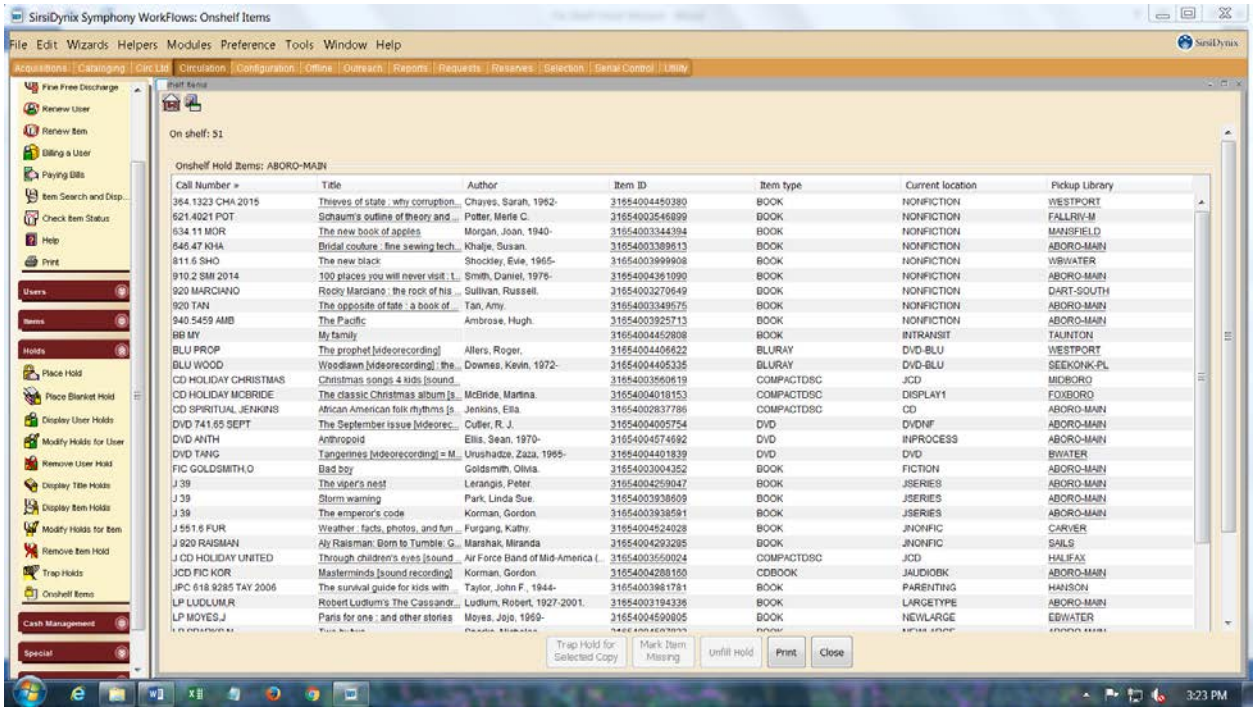


To display the Onshelf Items list

1. In the **Holds** wizard group, click the **Onshelf Items** wizard.
2. In the **Onshelf Items** window, the wizard displays a table that lists onshelf items with holds that can be filled by the station login library. The **Onshelf** field above this table displays the number of hold items in this list.

   Depending on the selections made in wizard properties, the following information may display for each hold: call number, title, item ID, item type, current location, date/time discharged, and pickup library. You can click the column headers to sort the Onshelf Hold Items list.

   For example, you can sort the list by the Notify Via field (if configured to display). This way, you can sort all of the users together that are notified by PHONE, making it much easier to call the users.
3. Depending on how wizard properties are set, you can perform the followings actions for a hold. Select the hold in the list, right-click and select an option from the right-click menu. Or, you can click a next step button.



- **Trap Hold for Selected Copy** — If you click this button, the Current Status of Item window opens. To confirm the proposed action, click **Make Hold Available**, and the selected item will be trapped for the hold. If you click **Cancel**, the hold is not trapped, and you are returned to the list.
- **Mark Item Missing** — If you click this button, the selected item will be marked as MISSING. If configured in properties to display, a **"**`Do you wish to continue with Mark Item Missing?`**"** message displays. Click **OK** to mark the item MISSING, and the Onshelf Hold Items list is updated. If you click **Cancel**, the item is not marked MISSING, and you are returned to the list.
- **Print** — If printing is configured for your workstation, when you click this button, the entire Onshelf Items list for the selected library(ies) prints. If you sort the list by home location you can insert a page break between locations if different staff members select items from different parts of the library.
- **Close** — Click this button to exit the wizard.