SHARED AUTOMATION SYSTEM USERS' GROUP
MEETING OF MAY 28, 2015
SYSTEM UPDATE

Statistical Summary

Circulation System Availability:	Mar: 100%	Apr: 100%
Patrons:	Apr 1st: 657,033	May 1st: 654,586 (-2,447)
Items:	Apr 1st: 4,997,159	May 1st: 4,995,331 (-1,828)
Bib Records:	Apr 1st: 963,513	May 1st: 964,737 (+1,224)
24/7 Phone Renewal:	Mar: 810	Apr: 681 (-129)
Training:	Advanced Searching, Director's Station, Linking	

Collection Agency Procedures – Reminder

Just a reminder of the Collection Agency Procedures policy that is part of the Circulation Policies and Procedures of the Circulation Services Committee (http://tln.lib.mi.us/committee/circulation/files/docs/Circulation-Policies-and-Procedures_new-2013.pdf):

- All items referred to collection agency must be handled by the owing/referred to collection library.
- Payments for the REFERRAL bill should only be accepted at the library that referred the patron to collections.
- The STAFF line on the Extended Info tab of the patron record is to be used for collection agency information only. Do not change or remove any info in this line.

Helpdesk – Reminders

As we move into vacation season, we just want to remind everyone to open tickets in the helpdesk rather than emailing or calling individual TLN staff. The TLN centralized helpdesk system is in place to support you and to help us respond to your requests in a timely manner. We ask that you either call the helpdesk for assistance or open a helpdesk ticket. By doing this, it eliminates the guessing game for library staff to figure out which TLN staff person to call and whether or not they are in the office.

When you open a helpdesk ticket, please do not change the 4 character library code to your name. For reporting purposes, there is one login for each library and we request that the 4 character library code name not be changed. By all means, change the email address to your own email address if you are the requestor of the helpdesk ticket. There is a default email address in place for each library but the requestor can override that with his or her own address so that the requestor will receive updates on their helpdesk ticket from TLN staff.

Also, be sure to select the appropriate category and sub-category for your request. Doing so will also help us in responding to your requests in a timely manner.

eLibrary – Farewell

Sunday, May 31, 2015 will be the last day of use for the eLibrary catalog. As of Monday, June 1, eLibrary will no longer be available, and any eLibrary traffic will be redirected to the Enterprise catalog.

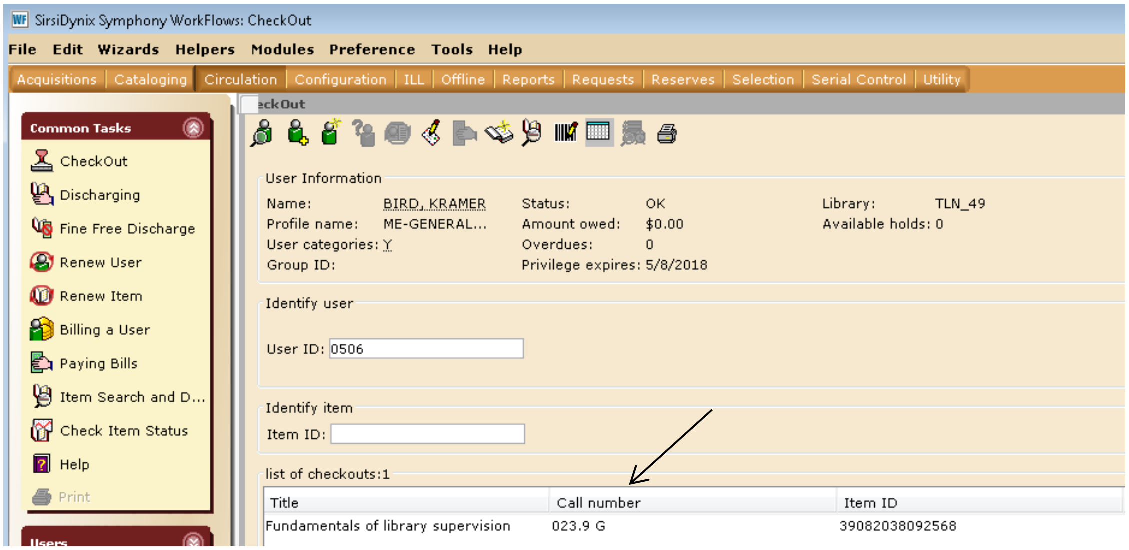
Symphony v3.5 Upgrade

We will upgrade the shared system to Symphony v3.5 on Sunday evening, May 31, 2015. The new WorkFlows client was sent to each library on CD via TLN delivery. Also on the CD are the installation instructions and the Highlights document.

The Symphony v3.5 Highlights document is also attached to this update.

SYMPHONY 3.5 RELEASE HIGHLIGHTS AND CORRECTIONS

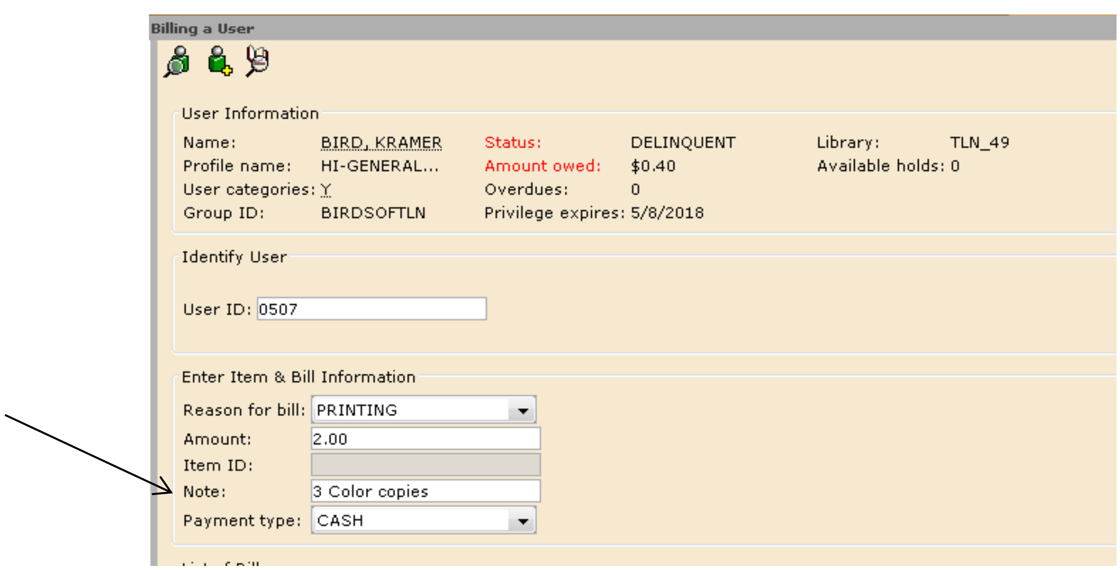
- **<u>Call number column added to list of checkouts</u>** – A call number column has been added to the list of checkouts within the Checkout wizard and the Checkouts tab of the Display User wizard.



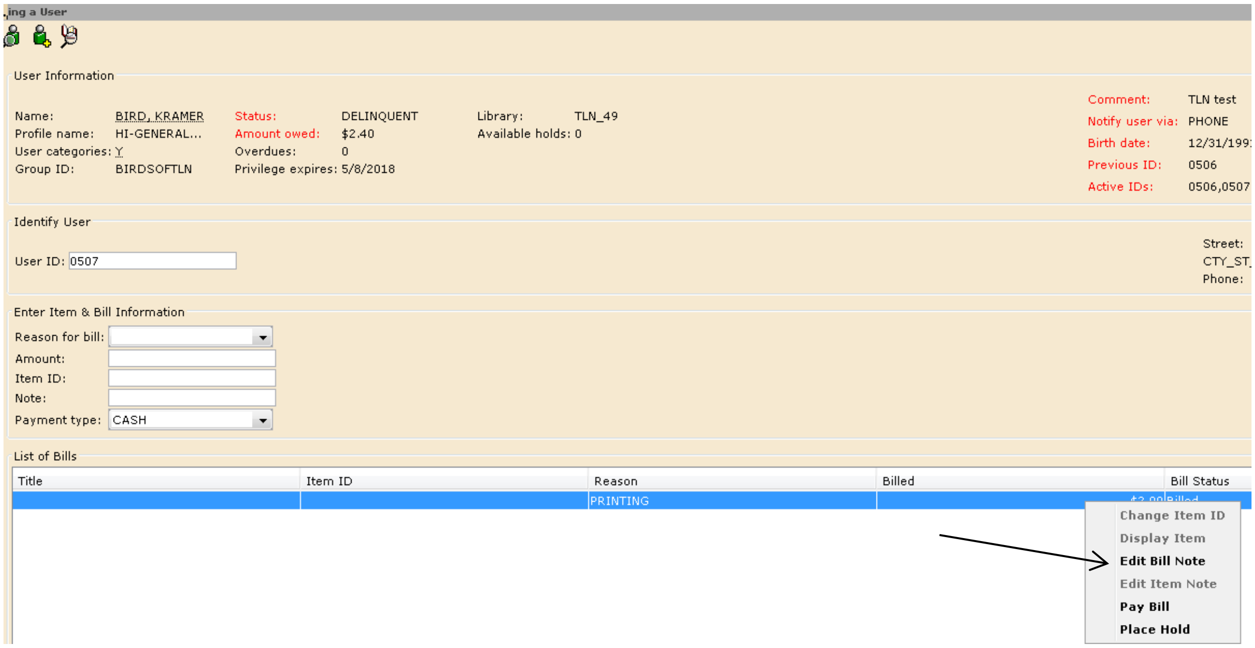
- **<u>Payment receipt improvements</u>** – The formatting and layout of WorkFlows payment receipts have been improved.

- **<u>Email checkout receipts</u>** – The ability to send checkout receipts via email has been added to the Checkout wizard. If interested in this functionality, after the upgrade open a helpdesk ticket with a Category/Subcategory of SAS Configuration/Properties to request to have it turned on for your library.

- **<u>Note field added to the bill record</u>** – A note field has been added to bill records to allow staff members to enter a custom message to associate with a bill record. **This feature will be configured for each library post upgrade.**
  Notes can be added to bills during the bill creation process in the Bill A User wizard.



The Edit Bill Note right-click option can be used in the following wizards: CheckOut, Display User on the bills tab, Display User helper on the Bills tab, Pay Bills helper, Paying Bills, Renew User and User Lost Card.



- **<u>RFID pad support in additional wizards</u>** – RFID pad support has been added to additional wizards within WorkFlows, including Bill a User, Checkout, Discharge, Discharge Bookdrop, Mark Item Used, Renew Item, Trap Holds, etc.

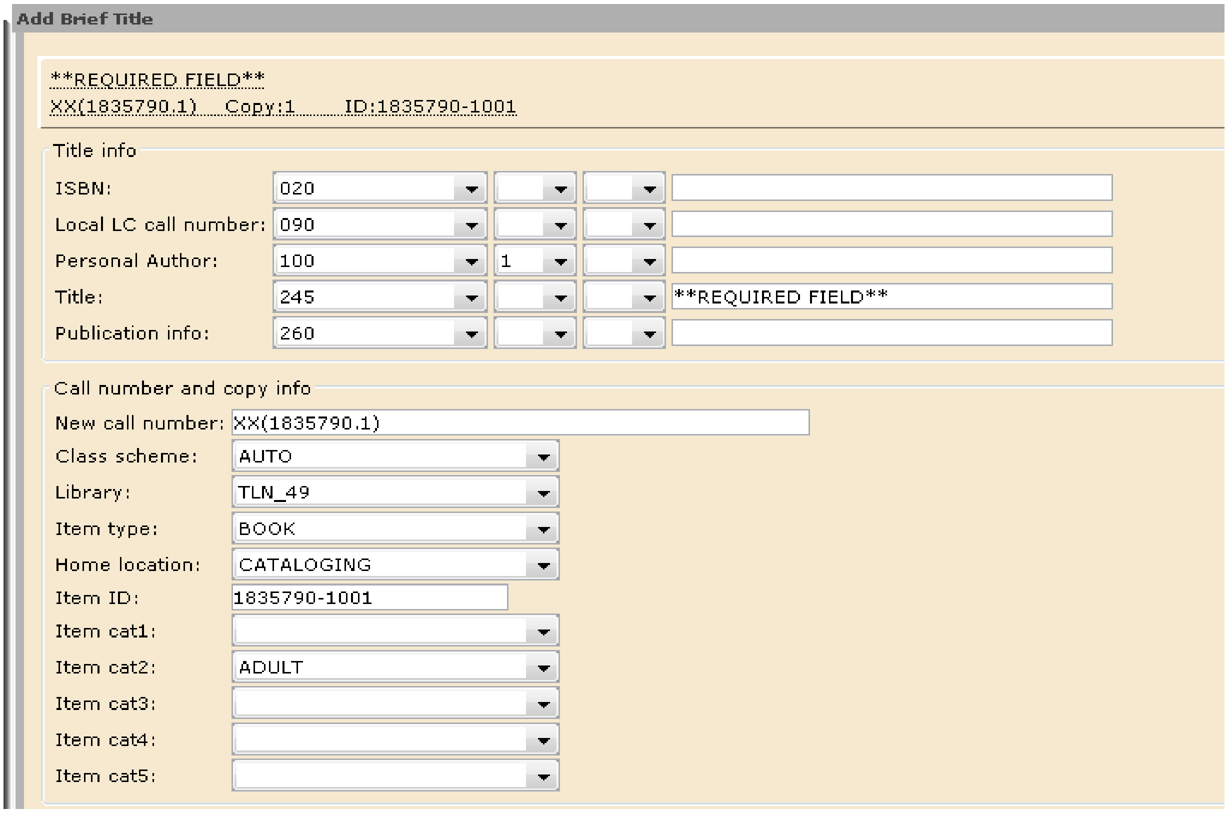
- **<u>User signature pad support added to WorkFlows client</u>** – The WorkFlows client has been enhanced with support for adding a user's signature to the user record. Staff users can add signatures to user records by loading a signature image from a file or by using a peripheral signature pad device. Open a helpdesk ticket (SAS Configuration/Other) for more information after the upgrade.

- **<u>New User Categories added</u>** – Seven new user categories (User Categories 6-12) have been added to the User Record. They will be hidden from staff view until the shared system determines a need for any or all of them.

- **<u>Pull Onshelf Holds wizard issues resolved</u>** – When the Onshelf Holds wizard was added to the WorkFlows circulation client in a previous Symphony upgrade, there were problems with it for sites that also use the Acquisitions wizard, Add Ordered Items to Catalog, so we were not able to implement this functionality. These problems have been resolved and after this upgrade we will be able to begin to configure this wizard for each shared system library. This will allow libraries to access the list of onshelf items with holds (aka: the send item list) right from the circulation client, without having to go to the Reports login to view the report. Library staff will be able to trap the hold, mark the item missing, or unfill the hold, right from the wizard in circulation.

  After the upgrade, we will complete all the set up and configuration for the Onshelf Holds wizard for each library; once the set-up work is completed, we will send out more information about how it works and announce a date when we can begin to use it.

- **<u>Item categories 3, 4 and 5 added to the Add Brief Title wizard</u>** – Item categories 3, 4 and 5 have been added to the Add Brief Title wizard.



- **<u>Change Display Library Helper</u>** – A helper, Change Display Library, was added to all Cataloging wizards that have a Call Number/Item tab for multi-library systems. This helper allows staff users to view only items belonging to a particular library within a title's Detailed View.

- **Display of User Transaction Lists in Circulation Wizards** – Lists of a user's current charges, bills, and holds can be displayed at the bottom of circulation wizard windows (Checkout, Pay Bills, and Renew User). These lists now allow the right click functionality to be used, so that, for example, when in the Checkout wizard, staff would see a list of a patron's current checkouts, including those that are overdue, and be able to right click on a title or titles in the list and Renew; staff would also see a list of a patron's bills and would be able to right click on a bill or bills and choose Pay Bills.

  When this functionality was first introduced to WorkFlows several upgrades ago, it was only recommended for Symphony K12 sites and small libraries because it could cause performance problems at large sites where users may have a large number of charges, holds and bills. We didn't pursue this functionality at that time, because of this, and also because while you could see the user transaction lists, you couldn't do anything with them.

  With the ability to use the right click functionality in these user transaction lists, so that items can be renewed, bills paid, etc., without having to leave the Checkout Wizard, we decided it was time to revisit the Display of User Transaction Lists policy. Our testing shows that users with 400 or 500 checkouts might take 5 to 10 seconds to load in the Checkout wizard, but we don't have very many users on the system with that many checkouts, so we don't believe this will be too problematic. The 'users' whose records will be slowest to load are the Discard, Missing, and InProcess user records for each library, as these tend to be the records with the highest number of checkouts; these records might take up to 30 seconds to load. This delay is only to load the patron data, checkout activity is not affected.

  We believe the benefit to staff workflow that is gained will outweigh the negative of a few user records being slow to load. This is a global setting, so it is either on for the entire system or off. We're going to turn the functionality on with this upgrade and see how it goes. If it turns out not to be worth it, we'll turn the functionality off.