

Best Practices

ODIN Workday – Carrington ND

March 28, 2012

Topics discussed in the Best Practices session at the ODIN Workday in Carrington ND on March 28, 2012:

- How to add local library privileges to an existing patron record
 - Find the global record – DO NOT alter anything in the global record, especially the barcode.
 - Go to Local Patron Information node and add XXX50 privileges as per normal.
 - Go to Additional ID's node and add subsequent barcode information as per the card being issued to the patron.

- How to 'take over' an existing patron record
 - As a courtesy, notify/contact the circulation librarian at the patron's current home library.
 - Find the global record – alter the Home Library, ILL Library and ILL limits fields. IF you enter your library's barcode in the global record BE CERTAIN to preserve the current library's barcode and add it as a subsequent barcode in the Additional ID node.
 - Go to Local Patron Information node and add XXX50 privileges as per normal.
 - Go to Additional ID's node and add subsequent barcode information as per the card being issued to the patron, or preserving the original library's barcode number.
 - Verify patron address.

- It was noted that with students taking courses from multiple campuses, their Home Library and ILL library didn't always reflect their actual location at the time. It may be time for the ILL group to have further discussion on mailing ILL's directly to students, and this topic would be taken up there.

- A demo of the fast patron registration form was conducted
 - To use, change the circ.ini entry of FastPatronRegistration from N to Y.
 - The fast patron registration form incorporates elements of the global record, local record and address record.

- ILL total and active limits must still be manually entered.
- On the fast patron registration form is a 'Save Defaults' button which allows certain information to be saved, and those fields will be populated when invoking the form in the future.
- A 'Save Defaults' button is available in the item record. This allows you to save information in certain fields, and when adding new item records, those fields will be populated with said information. If the information ever needs to be changed, simply make the changes and click 'Save Defaults' again to save the new information.
- Best practices in naming conventions for services
 - It is beneficial to always begin the name with your library's 3 letter ADM code when running a service.
 - Spaces are not permitted in the output filename
 - Special characters – with the exception of hyphens and underscores – are not allowed in the output filename
 - When using the file upload process on the ODIN website, it is very important that the convention of beginning filenames with your library's 3 letter ADM code be followed – the holding directory for the uploaded files is shared by all ODIN libraries, and it extremely beneficial to have this distinction in filenames.
- Best practices for submitting an ODIN help desk ticket
 - The link to the ticket page can be found on the About ODIN or Website Info on the ODIN homepage. Links can also be found on each of the ODIN training pages. The direct link to the ticket page is <http://www.odin.nodak.edu/webticket> .
 - Enter the fields of the form as completely as possible
 - When entering the 'Details' field, be as thorough as possible
 - Give workflow used when experiencing the issue
 - Give patron/item barcode examples when appropriate
 - Note if the issue occurs on one or multiple computers in the library
 - Note if the issue is continual or intermittent
 - Add a screenshot if applicable

- File types were supported for attachments to tickets include: gif, jpg, png, txt, rtf, html, odf, pdf, doc, docx, ppt, pptx, xls, xlsx, xml, rar, tar, xip
- When Staff access is needed for student or part-time employees to the ODIN website in order to view training, it is possible to grant staff privileges to the individual logins of the student/part-time staff. Alternatively, a 'dummy' record could be created in Aleph, and then an account created for the ODIN website which staff privileges are granted to, and could be used by all student/part-time staff in the library. The password for this dummy account could be changed each semester.
- UND Law Library has step-by-step instructions on how they conduct their serial deletion process. It was said that these types of library procedures could be added to the ODIN website in the 'Library Created Documentation' section of the training page. While everyone's procedures vary from library to library, such procedures may be able to offer a launching point for particular tasks, and thus the wheel would not have to be reinvented in each library.