SAILS Network News

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Executive Director's Report

It is official – the SAILS Offices will be relocating to the Lakeville Corporate Park on October 1. The lease for the new space was signed in April and since then we have been busy planning the new offices and determining what furniture we are moving and what furniture we will be making available to members. Our new offices will be at 10 Riverside Drive, suite 102. Many of you might recognize this as the address of the SEMLS office. We are moving into the same space which has been vacant since SEMLS was dissolved. The space is smaller than our current offices but the layout is more efficient. We will have space for small meetings and training sessions but our large meetings are going to be taking place at member libraries. Once we set up the 2014 meeting schedule we will send out an email asking for libraries to volunteer their meeting rooms.

Just before the big move, SAILS is going to be moving the SirsiDynix software and our data from locally housed computers to the SirsiDynix Cloud. We will have more details later this summer about what you can expect when we make the transition. The process will be similar to when we install a new server. When we go live again you won't even notice that you are connecting to a computer outside of Massachusetts. This is a more secure and stable environment than what we can support locally. Weather will no longer be a factor – hurricanes may blow and blizzards may put a foot of snow on our roof but our central computers will be housed with backup generators, backup Internet lines, and backup locations. Once we are cloud-based we will be able to make the best use of the new Blue Cloud product line being developed by SirsiDynix. We will have more information about Blue Cloud in the June edition of the newsletter.

May 1st is the launch date for the SmartPay credit/debit card payment solution. Initially this is going to be used by the Lakeville Public Library and Norfolk Public Library. Once a 30 day testing period is completed and we see how the process works the service will be opened up to other SAILS members. This product was selected because it allowed the network to comply with Department of Revenue regulations that require municipal departments to recoup credit card processing fees. It doesn't require that all libraries participate. The audit reports are more complete than comparable products. I often hear from directors that

patrons want to be able to pay fines with credit cards and I am pleased that we can now accommodate that. Patrons may also use the service to make donations to the library.

Four of us attended the annual Massachusetts Library Association Conference in Cambridge this April. Several of us attended sessions about how libraries are using the Collection HQ product for collection management and evaluation. Directors Station can be used to create the same types of reports and it is available at no cost to SAILS members. We will be working over the next few months to develop templates and tools to help SAILS libraries get the most out of our Directors Station data.

Please remember now is the time to change your defaults on your public computers so patrons are logging into Enterprise instead of e-Catalog. Enterprise is still being fine-tuned but it provides options for searching and placing holds we can't offer patrons in e-Catalog. The e-Catalog server is being decommissioned in late June and you don't want to wait until the last minute to familiarize yourself and patrons with the new interface. Don't forget to update your links on your website too!

Enterprise Handout for Patrons and Staff

As we move away from eCatalog and completely to Enterprise, many have requested training tools for patrons and staff. Specifically, to make available a handout for Enterprise, similar to what was made available after our most recent updates to iBistro.

A handout is now available online to link, download, and/or print out for patrons and staff. You can access it here: http://www.sailsinc.org/brochure/screenshot%20handout%20patrons.pdf

The handout briefly goes over the basic anatomy of a search result page and an item detail page. It also highlights what is new like search facets and the expandable areas inside of an item detail screen. Hopefully it will help patrons and staff learn to use Enterprise to its fullest. If you have any questions at all about Enterprise, don't hesitate to email eservices@sailsinc.org.

Judith Kleven

The members of the SAILS Library network extend their congratulations to Judie Kleven on her retirement from the Elizabeth Taber Library in Marion. Judie has been the director of the Taber Library for 26 years. She was also a founding member of the SEAL Library Network. Her focus has always been to provide superior service to the residents of Marion. She will certainly be missed in the library. Retirement will offer her many new opportunities which we know she will embrace whole-heartedly as she did the many challenges she faced as the director.

Best wishes and have fun!

Linking to Enterprise

There are several of you who send emails to patrons, have links to new books on your website, and use a service, such as Book Letters, to alert patrons of new titles, etc. These are all great ways to generate excitement about the library and provide excellent customer service. What you need to start changing are the links into the catalog. Many of these services are pointing to the e-catalog. At the end of June, these links won't work. The links need to be updated to point to the new Enterprise catalog instead. Here is an example of a link to a specific title:

http://sails.ent.sirsi.net/client/easton/search/results?qu=9780670024971

All the service needs to do is put the ISBN at the end of the link. The library is indicated after the word "client" in the URL. A complete list of library specific links into the catalog is available at:

http://www.sailsinc.org/index.php/enterpriselink/

There is no need to log into Enterprise before searching, as there is with e-catalog. Just make sure your correct library "profile" is in the URL, and your patron will get your specific Enterprise environment. If you have questions about setting this up for a particular service, let us know and we'll try to help. If you can give SAILS the requirements from the service, we can probably figure out what the link format should be.

Highlighting in Director's Station and More!

We are very pleased with the new version of Director's Station that the network has upgraded to. It is more forgiving with browser choice and a lot of its quirks have been addressed. Staff that I know who are heavy Director's Station users have commented that it is much easier to use now and has some new features that are nice time savers. What has been tripping up a lot of Director's Station savvy user, though, is the difference in highlighting data cells in order to generate a list of books or patrons. The new action is actually a lot easier:

- Click the mouse and begin to draw a box around the cell or cells you want lists from.

- When you have the box around the data you want, release the mouse and you should get the options you are used to after highlighting in the old system.

Also with the new system there are other features that can help us get a lot of useful information out of the system. I was inspired by a presentation I saw at MLA this year on Collection HQ to find ways to make Director's Station work better for staff. Two things this program did really well was give visual cues about your data and aid in collection development.

Visual Cues—Meters!

You have the option to change your output into a meter so that you can keep an eye on the pulse of your data. Whether that be the catalog, patrons, or bills, etc…

To the right is an example of a meter setup to show you a snapshot of delinquent patrons. As you can see without needing to run any report, this library has far too many delinquent patrons. This kind of meter can be customized to give you quick information that you may want to take action on.
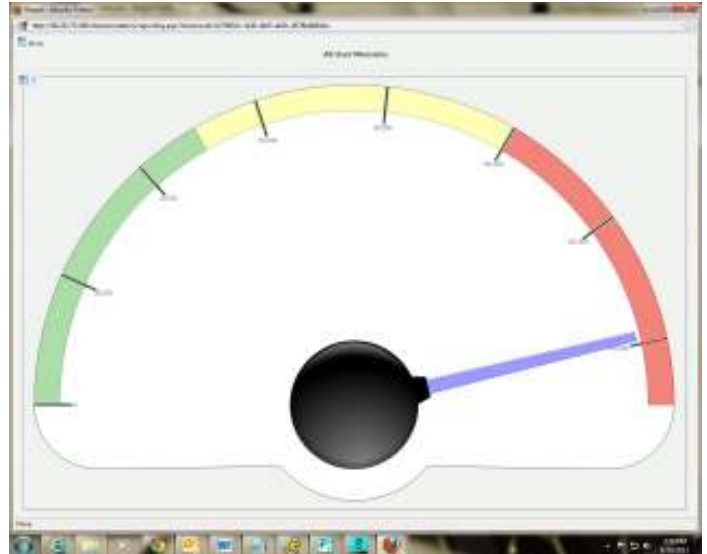
Collection Development—the Calculator and Measures!

If you really pay attention to which measures you are looking at when viewing a report you can gather all sorts of information about your collection and data. If the delivered measures don't quite say everything you need, you can combine data elements to try and create the desired information by using a calculator.

This next example is looking at the Dewey sections of a collection with the Turnover Rate turned on. This can give you a glimpse as to which areas are moving despite their size. With this kind of information you may discover topics your patrons are interested in but you may not be developing as aggressively as you could be.

Measures			
Dewey Call Number	% of Copies to Total Copies	% of Titles to Total Titles	Turnover Rate
All			13.61
(000) Generalities	0.83%	1.01%	7.20
(100) Philosophy & psychol	1.25%	2.13%	13.11
(200) Religion	1.12%	1.90%	10.70
(300) Social sciences	5.80%	7.51%	8.27
(400) Language	0.52%	0.90%	10.32
(500) Natural sciences & m;	4.18%	4.19%	12.32
(600) Technology (Applied	6.04%	7.77%	12.76
(700) The Arts	4.80%	7.08%	11.73
(800) Literature & rhetoric	3.51%	4.97%	5.88
(900) Geography & history	8.68%	9.98%	6.83
(All Non Dewey Total)	63.27%	62.51%	15.93

If you have any other ideas, questions, or issues with the new system we may not be aware of, or just general Director's Station questions please let us know and email us at support@sailsinc.org. Going forward I will be advertising any ways I've found to make Director's Station a more useful tool for all of us! -Ben Phinney

What are Requests and what do I do with them?

Request are often an under-discussed topic and new staff may never be aware of their existence. We thought it might be useful to take the time to discuss the process for a moment. Requests are forms patrons access in eCatalog to send information to their library. There are a number of requests SAILS has made available to patrons through eCatalog. Patrons are able to send their libraries Change of Address information, Requests to Purchase titles, as well as to just simply Send a Message.

How Does this Work?

Each Monday, Wednesday, and Friday, SAILS runs a report, which lists all of the "New" Change of Address, Request to Purchase, and Send a Message requests in the system for your library. These are saved in the "Finished Reports" folder, accessible with your circulation login.

You can then reply to the patron through Workflows!

Processing Requests

The following example uses an Address Request.

Viewing the Request

1. Log into Workflows using your circulation login.

2. Click on the "Finished Reports" wizard

3. Click on the report titled "Requests – (your library name) and view the finished report.

You may choose to view the log or not, it won't matter.

Sample Report Entry

1) Request ID:SAILS-153 Status:NEW

 Request Type:QUESTION Operator Access:PUBLIC

 Date Placed:12/24/2002 Date Modified:NEVER

 Reply Date:NEVER Date Viewed:12/24/2002

 Origin Library:SAILS Service Library:SAILS

 User ID:220395585855

 User name:Smith, John

 REQUEST INFORMATION ---

Library Note: For immediate response, please call your library. If you wish to be contacted by e-mail, please provide your address below.

Question:I am attempting to renew one of my library books online, The Hobbit by J.R.R. Tolkien, but it's saying that there's a hold on the book. I am not finished with the book and would like to renew it until the 7th of January like the other books I have checked out. Thank you.

E-Mail Address:jsmith7@aol.com

Replying to the Patron's Request

1. Go back to Workflows, and display the Request toolbar

2. Open the modify request wizard

3. Type in the Request ID: For example: WBWATER-66, and click the "OK" button.

4. A new window will display:

5. Click the "Reply" tab and make the following changes (edits):

6. Change the status from "New" to "Replied"

7. Change reply date from "NEVER" to "TODAY"

8. At the bottom, on the REPLY line, enter in your reply to the patron. For example, thank you for the information. We've updated your record.

9. Click the "Modify" button. – it looks like nothing happens but it does update the record.

For more information view the Patron Requests Manual:

http://www.sailsinc.org/Manuals/CircRequests.pdf

NOFAVS Progress

Since March we have been in the process of notifying patrons of the issues with Enterprise and Favorites Notices. There are several alternatives available to patrons who currently receive favorites notifications. If you recall one of these options was to allow patrons to opt out of the service all together by emailing us with NOFAVS.

Before contacting patrons we started off with around 7000 patrons registered for favorites notices and through our communications with patrons we have turned off favorites for over 400. We have more and more NOFAVS requests coming in after our weekly (Saturday) run of the favorites report. Those that haven't responded yet are hopefully happy with receiving notices without making new selections or are using an RSS feed now. Please help us by educating your patrons about favorites and Enterprise.

Intranet Site at Norfolk

John Spinney has recently created an intranet site for the Norfolk public library with all of their policies and procedures online using a Google Site for staff to use. We thought this might be something other libraries would want to look into using. We asked John to summarize his motivations and the process he went through to do this for his library incase there were others interested in developing something similar for their library.

"My daughter was telling me how she was using Gmail at her company and had set up a page for her employees so everything they needed was right there. That sounded great to me since sometimes I have a hard time finding things because I don't use them as much as some other staff. I was also thinking of all those sheets of paper hanging around the circ desk that just look messy. So I decided I would set up a basic page and see what everyone thought. Everyone that I talked to liked the idea so the next step was collecting all the information that they would need. We included policy, phone directory, cataloging charts, circ info, calendars, announcements, and even links to web sites they might need, like lunch menus from local restaurants.

The process was pretty easy. To find Google Sites you have to click on more and then even more on the Gmail bar. Once you set one up it will be right there on the first page. There are many templates to choose from, we chose the intranet site template. From there it is just a matter of uploading all your documents, contacts, links, etc. You can then share the page with just the staff in your library so they will be the only ones who can access it."

-John Spinney

New Additions to Overdrive's Next Generation Experience

As of April 15th, many improvements have been made to our Overdrive website. Overdrive has begun an ongoing process of making weekly and monthly changes to the website to improve the content and experience for your patrons. The following devices will now display in the drop down menu when searching.

- iPhone, iPod Touch, iPad, Mac, Windows Phone, Windows 8 Tablet, BlackBerry, BlackBerry Playbook, Android, Sony Reader Wifi, Kindle Fire, Nook (Color & Tablet), Kobo

These improvements have also been made to our site.

- The new and well-received Grid and List view options will be added to the Wish List page.

- The following note will be added to details pages for Advantage titles: *Waiting list may be shorter for your library.

- The Menu icon will be visible on all pages.

- The 'Edition' section will be expanded by default on a title details page.

- Accessibility enhancements and Bug fixes

- For U.S. libraries only: Kindle Books will be available to borrow and enjoy on additional mobile devices, including but not limited to, iPhone, iPod Touch, and all Android devices.

Two Quick Reminders

Two issues have come up several times recently that we thought might be worth sending out a general reminder about.

Clean Holds Report

The clean holds report sets items in transit automatically when hold expires on shelf. So, if an item comes up on your clean holds report and it is not removed from the shelf, its status in Workflows will be "In transit." If not processed properly, this can create problems and confusion during checkout, longer than necessary wait periods for the person the hold should now be in transit too, and holds shelves that could have less clutter.

Issuing new barcodes to patrons

 If a patron is given a new barcode for any reason, the library must notify SAILS if a patron has an Overdrive account. So please always ask when replacing a barcode or updating an OUREG. Overdrive does not know when a barcode is changed. It has to be done manually by them. Because of this, holds on Overdrive do not transfer automatically if the barcode is changed. We only need to know the old number and new number and we can take care of it for you.

Upcoming Public Services Meeting

We have an upcoming Public Services Meeting scheduled on June 12, 2013 at 10 AM to Noon in our Meeting Room for anyone involved in public services. We will largely be going over Enterprise and answering any and all questions regarding this topic. But we will also be discussing other various public services topics such as the Virtual Catalog, Overdrive, etc… Save the date and we'll see you there!

Virtual Catalog Issue with Internet Explorer 10

The Virtual Catalog staff has had several reports of compatibility issues between the Virtual Catalog and Internet Explorer 10. They have not been able to update the VC software to resolve these issues, so they are recommending that users who are experiencing problems put their Internet Explorer 10 browser into compatibility mode.

This should be something many of us are familiar with as we have needed to utilize compatibility mode for other things like the latest release to iBistro and Director's Station.

How to put Internet Explorer 10 into compatibility mode:

1.   Start Internet Explorer 10

2.   Press F12 to open the developer tools window (appears at the bottom of the screen)

3.   On the top of the developer tools window click on "Browser Mode" and select "Internet Explorer 10 Compatibility Mode"

4.   Press F12 again to hide the developer tools window

Device Specific How Tos on Overdrive

From Overdrive's digital library blog. Posted: 22 Apr 2013 10:42 AM PDT by Adam Sockel

"As you may have noticed, with the creation of OverDrive's new Partner Portal, our Learning Center received a facelift as well. This change is not simply cosmetic! At the Learning Center, you'll find updates to our On Demand trainings, registration for live sessions and frequent additions to the resources available for training your staff and users.

Use OverDrive's How-to guides to teach users how to enjoy eBooks on their new devices!

Thanks to your feedback, we've added device-specific How-to guides that are now available to print from the Learning Center's Resources section—along the lines of the popular eBook Cheat sheet. The new guides include instruction on how to enjoy eBooks and audiobooks for iOS and Android devices, as well as the Kindle Fire, with more on the way. These materials are an excellent resource to distribute during training classes, at the reference desk or to give to patrons who inquire for more information."

To view more post on their blog and subscribe yourself visit:

http://overdriveblogs.com/library/

Network Statistics

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	March '13	March '12	Total FY'13
Total Intranetwork Loans	60,441	64,867	523,187
Total Items Circulated	365,497	405,755	3,268,188
Gutenberg	0	383	2,117
OverDrive Circulation	12,066	8,831	87,353
All Formats Circulated	438,004	443,581	3,357,658
VirtCat Items Borrowed	974	1,202	7,017
VirtCat Items Loaned	596	601	4,833
Cataloging Requests	4,777	4,077	33,675
MARC Records Added	4,262	4,683	45,139
Patrons Added	2,245	2,746	33,417
Patron placed holds	60,217	53,153	522,264
Total MARC	1,166,464	1,134,616	
Total Holdings	3,639,340	3,744,775	
Total Patron	474,383	468,052	
Total Uptime	99.37	99.99	

Upcoming Events

View the full event calendar

- **5/15—Membership Meeting**
  10 AM—12 PM, SAILS Meeting Room

- **5/22—Technical Services Meeting**
  10 AM—12 PM, SAILS Meeting Room

- **5/24—Shopper Card Order Deadline**