

SAILS Network News

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SAILS has Finally Moved to Lakeville!!!!!!



New address: 10 Riverside Dr. Suite 102, Lakeville, MA 02347

Annual Report

Our annual report has been compiled and the electronic version is posted as a PDF to our website. We encourage any and all staff members to view it.

The 2013 Annual Report contains an end of year summary by last year's SAILS President, Deborah Wall, an overview of the completion of our patron notification project, circulation trends looking at print versus digital material, and our initiative to move many of our services to "the Cloud." It also contains network stats both here at the SAILS headquarters and of the network as a whole.

It is posted as a PDF so it can be viewed online or printed out as well. Press ctrl

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+ p to print directly from the browser. Print all three pages as a packet, or you can even use the first two pages printed double-sided to make a nice handout. Just fold down the middle and you have a pamphlet to share with trustees or town administrators.

The print options can vary depending on which browser you are using. Ctrl + p will generally open up your computer's print dialog box. Chrome does have its own print screen, though. If you are using Chrome and aren't shown an option to print double-sided, click the link that says, "Print using system dialog... ctrl + shift + p" to go to your regular print settings window.

The 2013 Annual Report can be accessed here: <http://www.sailsinc.org/annualreport2013.pdf>

From Browse to Borrow

I had the opportunity to attend one of the free live training sessions offered by OverDrive this past September. I know that not everyone has the time to view these kinds of sessions so I wanted to share some information from the webinar I attended on user assistance called "From Browse to Borrow." This session was designed to educate staff on how to conduct interactions with patrons when they come into the library for help using the OverDrive service. While some topics only pertain to a specific group of users, this topic in particular I thought would be useful to most if not all staff members at the library.

Ask yourself, what is the first thing you do when a user asks how to borrow an ebook or audiobook from OverDrive?

If you aren't doing this already, the best answer is to ask good follow-up questions! Think of it as the reference interview for using OverDrive. There is more than one way to use the OverDrive service so it is important to get as much information as possible before beginning to answer a patron's question. This way, you can more effectively assist your patrons, and more often than not, do so faster and more efficiently.

OverDrive suggested trying some of these simple questions to probe into how to best help your patrons:

- What kind of device do you have?
 - Do they have a Windows PC, Mac, kindle, eBook reader, tablet, mobile device, etc...
 - The process is often different depending on the device.
- What do you want to borrow?
 - It could be an eBook or audiobook.
 - There may be a specific title or author they are looking for.
- Have you used OverDrive before?

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-If no, you may need to start from scratch and explain how the service works from login to check out.

-If yes, you may want to identify if there is a specific question or problem the patron is having using the service.

- Have you used this device before?

-If no, a little back ground on how the device works may be helpful.

-If yes, they may just need help figuring out how to get the device to work with the service.

Remember, the patron has four options available to them, so it isn't always straightforward:

1. They can read an eBook in the browser using OverDrive Read.
2. They can read or listen to a book with a mobile device using the OverDrive Media Console App.
3. They can read or listen to a book on a computer with either Adobe Digital Editions (eBook) or the OverDrive Media Console (audiobook).
4. And finally, they can transfer eBooks or eAudiobooks to an eBook Reader or digital audio player using Adobe Digital Editions (eBook) or the OverDrive Media Console (audiobook).

If you don't know how to address the patron's needs, OverDrive Help is the best source of information when using OverDrive. It can help troubleshoot issues you or your patrons are having, or simply allow you to explain how to use the features that OverDrive has to offer.

- There is "Getting Started" material. This is a series of device walkthroughs.
- Extensive troubleshooting documentation
- Help videos
- And if all else fails, you can contact SAILS Support through the help screen.

Again, ask good questions at the beginning of your interaction with the patron. Simply asking the right questions can save you time and help you identify and address the patron's needs. This will also help you to figure out which software, if any, they need to download in order to access the titles they want to use. Don't worry if it is a situation you've never come across before. If you run into problems, use OverDrive Help to troubleshoot and answer any questions you or the patron might end up having.

One specific thing you'll want to be aware of, is the difference when using the service with a kindle.

Kindle is one of the most popular brands for eBook readers and tablets at the moment. What your patron might not realize, and you will need to be aware of, is kindle has different compatibility issues over other

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brands and uses a different download process. Kindle uses its own kindle book format. Patrons are actually downloading titles from Amazon.com and not OverDrive. So a patron must be logged into both OverDrive and Amazon to download.

There are kindle apps as well as devices. They function relatively the same way, but what the app allows a person to do is read kindle books from Amazon even if they do not own a kindle device. Patrons used to using kindle apps may not be aware that their device can access OverDrive materials with the OMC app instead. Depending on the situation, this could be a better solution for them. On the other hand, a patron with a kindle fire can download the OMC App as well. This means kindle fires are not locked into only using the kindle format like a regular kindle ereader is.

You can read OverDrive's help documentation on kindle here: <http://help.overdrive.com/article/0473/Getting-started-with-Kindle>

To watch a recording of the presentation from OverDrive visit <http://cc.readytalk.com/play?id=9twa4> or go to their Learning Center for other free trainings at <http://partners.overdrive.com/learning-center/on-demand/> -Ben Phinney

The Value of Service from the Ames Free Library

We wanted to share this great article from Uma Hiremath, Director of the Ames Free Library, on informing patrons on the cost of library service. We found it very informative and thought others might be able to use it to generate their own ideas with their patrons. Enjoy!

“Hello Easton,

Statistics can sometimes provide an eye-opening perspective on reality. For example how much would \$1.61 buy you in today's world?

*1 small cup of coffee, or

*1 bagel with cream cheese, or

*1 month of library services?

Yes, you read correctly - your local taxes per capita support a full month of books, movies, music, newspapers, magazines, community space, programs, computers, audiobooks, and friendly faces!

As you can tell with even a quick reading of all the events crammed into October, the \$1.61 does not cover all the innovative programs enriching our community. For that we are appealing directly to you.

Here's what's happening between now and the end of the year and how you can support the library:

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*Buy a ticket to the Friends of the Library musical evening and help pay for museum passes.

*Have fun at Comedy Night and donate or buy gifts at the Silent Auction.

*Commemorate a loved one with an engraved brick - the supply is going fast!

*Make a tax deductible donation to the annual appeal at the end of the year.

If you can budget some part of your hard-earned income to these library fundraisers, we will continue to work responsibly to convert your generosity into all the many details, ideas and innovations that make us a place of which you are proud and which feeds your personal interests and growth. That is our promise to you.

See you at your library,

Uma”

Subfield Z Update

Enterprise displays the Subfield Z information slightly differently than eCatalog did for sets. In Enterprise, patrons have to select from a drop list which displays in alphabetical order. Because of this “Full set” is appearing after the individual Discs when placing holds. We have found that patrons are more often than not selecting the single discs even when there are full sets available to fill holds. We believe this is because “Full set” is not the first option a patron is presented with.

So rather than using the drop down to see what options are available, patrons are just selecting the first thing they are presented with. To correct this issue we are making a slight modification to the cataloging rules for subfield z. This will allow the full set versions of titles to be sorted before the individual discs, which is what most patrons are probably looking for. Using “A FULL SET” in the Subfield Z instead of just “FULL SET” will change the order in the drop down list. With the display order change, we hope to lessen the patron wait time for these sets.

Starting today you should use “A FULL SET” for all DVDs that you circulate as a set. The Subfield Z would be entered in as |ZA FULL SET. Existing call numbers do not need to be modified. SAILS is looking into making global changes to the existing records.

For circulation staff, just a reminder that when placing holds in Workflows, be mindful of which subfield z the item you are placing a hold on has. The hold will only be filled by an item with the same subfield z as the one you select and not every copy attached to the title.

If you don't know how to located the subfield z, this is how you can determine it:

- When using Item Search and Display, go into the Detail Display for a title.
- Select the Call Number/Item tab.

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- Under Item Info, look for |Z after the call number in the Call Number Information area.

The screenshot shows a library catalog interface. At the top, it says 'Item Search and Display'. Below that, there are icons for a book, a DVD, and a barcode. The main title is 'Game of thrones. The complete second season [videorecording] / Dinklage, Peter.' Below the title are tabs for 'Control', 'Bibliographic', 'MARC Holdings', 'Call Number/Item', 'Bound-with', 'Orders', and 'Serials Ctrl'. The 'Call Number/Item' tab is selected, showing a list of items. The first item is highlighted: '31654004012909 - 1 - DVD - CHECKEDOUT - In Use'. To the right, the 'Item Info' tab is selected, showing 'Call number information' with 'Call number: TV/DVD GAME SEAS 2|ZA FULL SET' circled in red. Other fields include 'Call library: ABORO-MAIN', 'Shadow call number: N', 'Item ID: 31654004012909', and 'Copy number:'.

If you have any questions please email catsupport@sailsinc.org.

Impact Survey

The Information School at the University of Washington in conjunction with the Bill and Melinda Gates Foundation has developed an easy to use tool for public libraries to collect data on how members of the public use library technology services.

The newly updated and recently launched Impact Survey is a full-service online survey tool designed for public library staff to understand community use of library technology services and how to improve those services. The Impact Survey evolved from the 2009 Opportunity for All study and makes the complex job of surveying patrons easy and fast at no cost to library staff.

Collecting patron-level data on library technology use is tremendously beneficial to public libraries. Understanding your community's unique technology needs is essential to providing patrons with useful technology services. Join us to learn how library staff can implement the Impact Survey and use the survey results to:

- Inform smart internal planning, strategy, and resource allocation
- Use local facts and figures to support advocacy and fundraising efforts when communicating with local decision makers and other stakeholders
- Improve their ranking with the Edge and other evaluation metrics
- Better serve their communities

Visit <http://impactsurvey.org/> to access and utilize the impact survey tools.

You can also visit <http://impact.ischool.uw.edu/us-public-library-study.html> to read the initial U.S. IMPACT Public Library Study.

Notification Process Reminder

SAILS sends out daily emails to libraries whose patrons are not properly registered for their selected notification method. With new staff at many libraries it seemed like a good time to have a general reminder on how to interpret these messages from SAILS and, most importantly, how to make sure your patrons are registered to be notified for their holds and overdues properly.

Automated Phone System or SVA

Patron needs two things to be registered:

1. Usercat3 must be VOICE
2. Phone1 must be a valid phone number (10 digits, no dashes or spaces) followed by two spaces then the word "VOICE" in all caps. SVA cannot call extensions.

Remember to check the failed notices report daily by logging into Workflows with ID: SVA, PIN: SVA

Generally if SAILS sends you an account to double check, it is because Usercat3 and Phone1 look like they are registered for different notification methods.

Email

Patron needs three things:

1. Usercat3 must be EMAIL
2. Phone1 follows the same process as above but has the text "EMAIL" instead.
3. And finally, these patrons need a valid email in the Email field.

If an address bounces, fix it if the error is obvious. If not, contact the patron via a different method to fix the error or register them for a different contact method.

Text Messages

And finally these patrons need three things as well:

1. Usercat3 of SMS
2. Phone1 as described above but with the text "SMS" this time.
3. And the SMS Notice Contact Info Tab must also be filled out. The phone number entered here is what is used to contact the patron and not the Phone1 number. Also, overdue and holds must be checked off next to the phone number.

These fail either because of the Usercat3 or there is missing information in the SMS tab.

You can find the complete set of instructions on how to properly update records for our notification methods off of the staff website here: <http://www.sailsinc.org/circ/PatronRecords-notify.pdf>

Boyden Library Rededication

The Boyden Library Board of Trustees will be holding a re-dedication ceremony on Saturday, November 16 at 10:00 a.m. to formally celebrate the opening of the newly renovated and expanded library. Past and present library board members and representatives of the Massachusetts Board of Library Commissioners will be on hand to offer remarks. Refreshments will be available. Come and see Foxborough's new, beautifully designed 34,000 square foot public library, which features a total reconfiguration of all service areas and a 14,000 square foot addition. Designed by LLB Architects, the Boyden Library will accommodate library users for the next 20 years and beyond.



Purging charge history records for patrons

SAILS will be implementing a new policy regarding patron charge history in early 2014. This policy will limit the number of years the network will store a patron's circulation history. We currently don't have a limit so patrons can accrue an excessive amount of checkout history, in the thousands in some cases.

In the meantime, until this policy has been established, if you have a patron who has requested that their charge history be pruned, please submit the following information to support@sailsinc.org:

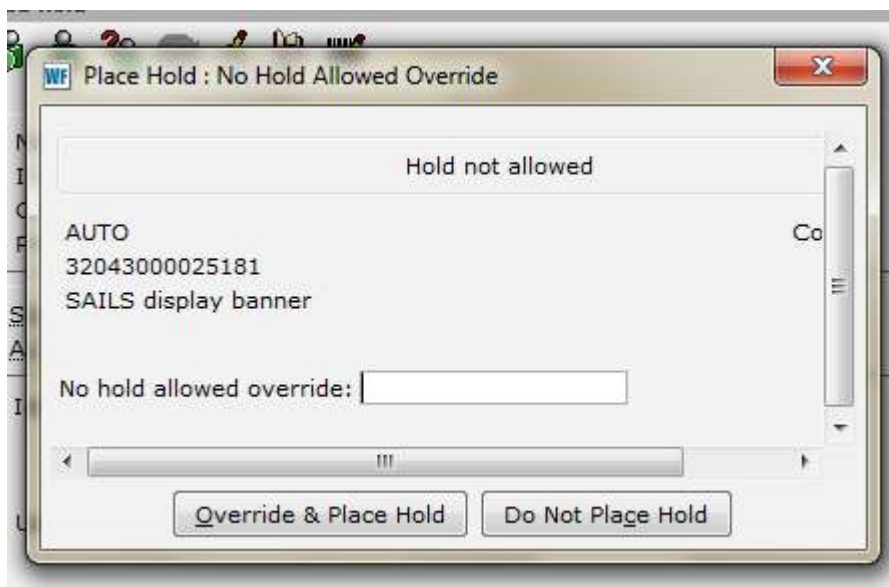
- The Patron's barcode
 - Date range that is to be purged (from what year to what year)
- or
- Total purge and change from ALLCHARGES to NOHISTORY

Google+ Phone Scam

We have had at least one library report receiving phone calls to update their Google+ account. We wanted to make everyone aware of these calls in case others were receiving these messages as well. This is a scam and has nothing to do with Google or your SAILS email account. Treat it as you would any other telemarketer. Google is not a company that will ever call you. If there is a change that needs to be made to your SAILS account, they will get in touch with us and not you.

Reminder When Placing Holds

Just a reminder when placing holds in Workflows. If you are prevented from placing a hold and given the following error:



Do not attempt to override the error. Although it may seem like good customer service to place the hold for the patron, this error means exactly as it states. The patron is not allowed to place a hold on this item. Even if it seems like the patron should be allowed to place the hold, each library has rules in their hold map that either allow or do not allow certain holds to be placed. When you get this error, the system is working fine and according to the hold map, this hold cannot be placed.

Again, do not attempt to override the hold. If you think the system is in error, please contact support@sailsinc.org and we will look into the issue.

New Director's Station Link

In case you hadn't heard, our SaaS instance of Director's Station is live! You will use a different link, but everything else is the same. If you have trouble logging in, check your browser. It will only work with Internet Explorer and Firefox 3.6. It will not work with Chrome or an up-to-date version of Firefox.

<http://dssail.sirsi.net/DirectorsStation/>

If you aren't a Director's Station user or, haven't used it in awhile and want a refresher course, setup an appointment to have a SAILS staff member come to your library for onsite training. Director's Station is a very powerful tool for your library than can help with tracking statistics, identifying trends, looking for database errors, generating lists of items or patron email addresses, and even collection development!

If you are interested in training or have questions regarding Director's Station please contact us at support@sailsinc.org.

New OverDrive Print Guides

Posted: 02 Oct 2013 08:02 AM PDT to OverDrive's Digital Library Blog by Cassie Renner

Get started with eBooks from your library

All you need to borrow eBooks from your library is an internet connection and a library card.

If you're using a tablet or smartphone, you may want to download OverDrive's free mobile app, OverDrive Media Console™, to easily find and save your library's OverDrive website and to download and enjoy borrowed eBooks on your device.

Get the app from your app store or from <http://omc.overdrive.com> for these popular devices and platforms: Android™, BlackBerry®, iOS (iPhone®/iPad®/iPod® touch), Windows® Phone, Kindle® Fire tablets, Kobo™ tablets, and NOOK® tablets.

Borrow eBooks with one click

If you're using a tablet or smartphone, use the app's **Add a Library** (or **Get Books**) feature to find and save your library's OverDrive website. On any device with a browser, you can also go directly to your library's site at: http://****.lib.overdrive.com

Once you find an eBook to borrow on your library's site, click **Borrow** and enter your library card information. You've now borrowed the eBook—that's all there is to it.

Read in your browser with OverDrive Read

The easiest way to start reading a borrowed eBook is to use OverDrive Read (if available). OverDrive Read lets you read eBooks right in your browser—no extra software or login required.

Simply click **Read** next to a borrowed eBook to begin reading.

For more information, visit <http://readinfo.overdrive.com>



Getting Started Guide now available in the Partner Portal

If your library only prints out one promotional piece for your digital collection, I would encourage you to select our newly created Printable Getting Started Guide. (Although, why would you only want to print one thing from the Partner Portal when there is so much goodness there?)

Those of you who checked out our [programming ideas](#) last week got a sneak peek of these materials! This front and back 'Getting Started' flyer explains the basics of your digital collection, a perfect handout for new users! Just customize with your library's digital collection URL and print. That's all there is to it.

Additionally, we've updated the existing device guides and added a few more, including NOOK and Kobo. All materials can be found in the Printable Getting Started Guides zip folder.

These guides are half sheet flyers that print off easily on 8.5" x 11" paper, perfect for in-house printing. We also encourage you to take the designs to a local print shop if you would like higher quality production.

-Cassie Renner is a Marketing Specialist with OverDrive

These new getting started guides and other promotional material can be accessed here: <http://partners.overdrive.com/marketing-outreach/libraries/promotional-resources/general-promotion/>

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Network Statistics

	Sept '14	Sept '13	Total FY'14
Total Intranetwork Loans	63,653	56,826	215,315
Total Items Circulated	323,705	348,665	1,142,121
Gutenberg	102	173	356
OverDrive Circulation	11,423	8,503	37,163
All Formats Circulated	335,230	375,331	1,179,640
VirtCat Items Borrowed	728	840	2,429
VirtCat Items Loaned	479	465	1,455
Cataloging Requests	7,620	5,757	17,130
MARC Records Added	7,071	6,970	15,599
Patrons Added	6,103	7,011	16,746
Patron placed holds	51,680	58,081	174,265
Total MARC	1,192,938	1,151,996	
Total Holdings	3,678,052	3,783,849	
Total Patron	476,167	467,885	
Total Uptime	n/a	99.32	

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Upcoming Events

[View the full event calendar](#)

- **11/13—Shopper Card Order**
- **11/20—Board Meeting**
10 AM—12 PM, SAILS Meeting Room