

SAILS Network News

April, 2021



Claudette Tobin Retires After 21 Years with SAILS

SAILS Associate Cataloger Claudette Tobin is retiring May 7 after 21 years working for SAILS.

Claudette is the person responsible for upgrading most of our libraries' acq and request records to full MARC records, making it easier for staff and patrons to find the titles they are looking for. She also takes care of a lot of the cleanups in the SAILS database.



We wish Claudette much relaxation and interesting travel experiences as she heads into retirement.

Best Wishes to Debbie Batson

SAILS sends congratulations and best wishes to Plympton Public Library director, Debbie Batson, who is retiring at the end of April. Debbie started in Plympton as an assistant and has been the director since 2001. She is also a member of the SAILS Board. We wish Debbie the best of luck in her upcoming retirement!



Overdrive Updates

By Chelsea Fernandes



We told you last month that OverDrive would have some updates coming and they are finally here! The most exciting new feature is a long awaited one: Libby will tell you if the book you just searched for is available from other Massachusetts networks. When you click on the Library Card Icon next to the title you will be shown a list of all of your libraries and whether or not they have the title you are looking for and then you are given the chance to either borrow it or place it on hold. If you then click on "Keep Browsing" it will take you back to the title and you can place another hold if you choose.

Design updates

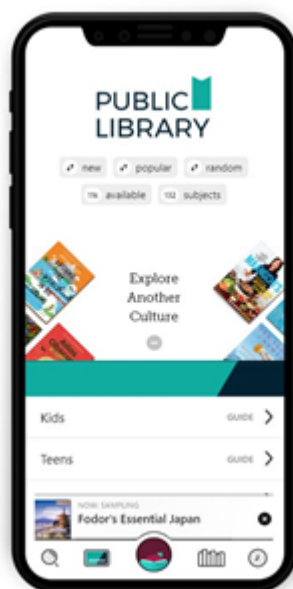
Your library's colors are displayed more prominently throughout the app.

Catalog guides now appear on the library home screen for quick discovery and access.

New filters for what's new, what's popular, what's available, and subject listings appear at the top of the library home screen for easier browsing.

The footer navigation is updated and a helpful tutorial guides returning users through the changes:

- Spyglass icon: Run a search
- Library card icon: Go to Library
- Libby menu: Manage libraries & get help
- Bookstack: Go to Shelf
- Clock: Open activity timeline



Wish list syncing

Libby now supports wish list syncing with the OverDrive app and your library's OverDrive website. Users with active wish lists will be notified in-app and prompted to sync their wish list titles into a single tag.

New Notify Me

Series tag that sends push or email notifications when the next issue of a magazine is available.

Automatic tag syncing across devices.

Automatic tagging of borrowed and sampled titles.

We encourage you to [watch this tutorial for a brief tour of these updates](#).

Symphony Workflows - 3.7.1 Installing

By Laurie Lessner

Monday early morning, May 3rd, we'll be installing the newest version of Symphony Workflows.

Enhancements of Interest**UNI-40939 - View another library's hold shelf**

The Manage Hold Shelf wizard now has a property to include a new View Another Library's Holds helper on the wizard screen. This helper allows the user to view the hold shelf of another library on the library system. For more information, see the "Manage Hold Shelf Wizard" and "View Another Library's Holds Helper" topics of the WorkFlows Online Help.
Symphony 3.7.1 | Enhancement | User Inspired

UNI-41387 - Show count of items listed in Manage Hold Shelf wizard

The Manage Hold Shelf wizard now has a counter displaying the number of holds on the hold shelf.
Symphony 3.7.1 | Enhancement | User Inspired

UNI-41991 - Cache Item IDs feature in Discharge/Checkin wizard for SirsiDynix SymphonyWeb

The "Cache Item IDs" feature has been added to the Discharge/Checkin wizard within SymphonyWeb. This feature improves the performance of the wizard by caching the item IDs of items being checked in with a barcode scanner, and only sending the item IDs to the Symphony server once the user clicks "Discharge Item". For more information, see the "Discharge/Checkin Wizard Properties" topic of the SirsiDynix SymphonyWeb Help.
Note: This feature is only available to the Discharge/Checkin wizard within SymphonyWeb, and not in WorkFlows.
Symphony 3.7.1 | Enhancement | User Inspired

UNI-42371 - Reorder columns in Manage Hold Shelf wizard

Staff users can now change the order of the columns in the Holds and Results tables in the Manage Hold Shelf wizard. For more information, see the "Manage Hold Shelf Wizard Properties" topic of the WorkFlows Online Help.
Symphony 3.7.1 | Enhancement | User Inspired

UNI-42372 - Expand and shrink tables in Manage Hold Shelf wizard

Users can now resize the Holds and Results tables within the Manage Hold Shelf wizard. If a user chooses to save properties from their WorkFlows session, WorkFlows also saves any changes to the sizes of these tables for the user's next session.

Symphony 3.7.1 | Enhancement | User Inspired

UNI-42542 - Windows within Discharging/Checkin wizard now display Item ID

WorkFlows now shows the Item ID of the currently-loaded item either in the title bar of or within any windows opened within the Discharging/Checkin wizard.

Symphony 3.7.1 | Enhancement | User Inspired

Fixed Bugs

UNI-41234 - Manage Hold Shelf wizard not sorting dates correctly

The Manage Hold Shelf wizard was not sorting holds correctly when set to sort by an attribute containing a date. This has been fixed so that the Manage Hold Shelf wizard sorts holds correctly when sorting by a type of date. Also fixed is a problem where the alignment of text in the Manage Hold Shelf wizard table did not change properly when the user changed the sort of the columns.

Symphony 3.7.1 | Bug | User Inspired

Upgrading the Client

We will send these instructions out prior to the upgrade.

If you want to be able to install workflows without needing admin access on your computer, an administrator needs to install a piece of software prior to installing the workflows client. This allows all future updates to be done by non-admins. If you don't want to go through that extra step, you will still need to have administrative access to your computer.

If you're in a school or your library is not allowed to install software without IT support, be sure to keep them in the loop that this is coming and we will make the extra software available when we get closer to the upgrade.

Installation Instructions:

1. Double-click on the WorkFlows icon.
 2. When you are prompted to either Install Now or Install Later, click Install Now.
 3. Select OK when you are prompted to exit the client.
 4. Double-click the WorkFlows shortcut on your workstation, if necessary.
 5. Follow the instructions in the setup windows.
 6. Answer the questions posted by the installation program by saying "yes" or "ok".
- At the end of the install, you will be prompted to connect the client to the SirsiDynix Symphony server. Allow the WorkFlows client to connect to the Symphony server and transfer server files to the client workstation.

If you are using a Macintosh workstation, please contact SAILS (support@sailsinc.org)

Holds for patrons - item in hand

By Laurie Lessner

Does this situation sound familiar? A patron calls to ask to put aside an item they "see" is on the shelf. You find the item, put it on hold for the patron, and immediately trap the hold for them. We've heard of a new problem that can happen with this scenario. If you don't select

the item in hand, when trapping the hold, it's possible the first copy added to the system will be selected to fill the hold, get trapped, and appear on the owning library's hold shelf. This may not be your library.



Holds aren't placed on local copies unless they're copy specific holds. The safest thing to do, after placing the holds on the items, is to use the discharge wizard, instead of the trap hold wizard. The discharge wizard should then direct you to fill the hold with the item in hand. It seems using the trap hold wizard, even if entering the local copy, can lead to inadvertently selecting the first copy added to the system as the hold. That is how title level holds are placed - on a basically random copy. Then the system finds an appropriate copy to fill the hold. Since you have the item available, using this method should flag your item to fill the hold.

Circulation Tip of the Month

By Chelsea Fernandes

Damaged Items



These procedures only apply to items that can no longer be used because of damage.

- The existing post-it notes for damage are to be used for minor damage so that a patron is not billed for damage that occurred before a permanent circulation note was placed in the item's record.
- The circulating library should place a copy-specific hold for the owning library's TECH patron, setting the pickup location to the owning library (send home for evaluation). A list of library TECH users can be found on the SAILS website here: <http://www.sailsinc.org/circ/LibTech.pdf>.
- The owning library determines if an item is damaged to the point it cannot be used. Therefore the owning library bills the patron
- If the library wants to discard the item, first bill the patron and then discard the item. The bill will remain on the patron record even if the item is discarded.
- When the owning library bills the patron use the REPDAMAGE bill type. Enter brief note in the patron record and the bill note.

Annual Technical Services Meeting

By Jennifer Michaud



This year's annual Technical Services Meeting will be held on Zoom on Tuesday, May 4th, from 10am to noon. We are currently selecting topics for the meeting's agenda and I will email those topics to the Cataloging List closer to the date of the meeting. Many of you are already using Symphony Web, but we will be giving a brief demonstration of it during this meeting.

Please register on the SAILS website if you plan to attend this meeting. We'll provide you with the Zoom login information a few days before the meeting.

[Click here to register](#)

If you want your name to be added to the Cataloging List, please email support@sailsinc.org.

Training Opportunities from SAILS

By Chelsea Fernandes

SAILS provides training for a variety of aspects of library service. We have a form that you can fill out to request training and it can be found here:

<https://www.sailsinc.org/training-request-form/>.



However, what some of you may find most useful about the form is it gives you an idea of the scope of things we are able to help with. We want to make sure that whatever kind of training

we offer it is customized as closely to the individual needs of your library as possible. For the time being, these training sessions will take place on Zoom as do our other training sessions, but they can be as formal or as informal as needed.

For example, we could create a session based on teaching the library staff to perform inventory and also brush up on their OverDrive skills. Or maybe, you want to get everyone together to go over the circ map and hold rules.

These are just a couple of examples of how we can tailor the training towards your library and what will best suit your needs. If you aren't sure that the form covers what you are looking for, as always, you can just email support@sailsinc.org and let us know what you are thinking and we will do our best to work with you.

OverDrive Training Opportunities

By Chelsea Fernandes

Join OverDrive for their free monthly webinars to get an overview of the shopping and purchasing experience in Marketplace or to learn how easy it is to get patrons started with Libby!

There are two classes: **Getting Started with Marketplace** and **Getting Started with Libby**.

The dates for the upcoming classes are as follows:

Getting Started with Marketplace

Wednesday May 5, 2021 at 2:00 pm

Tuesday June 1, 2021 at 11:00 am

To learn more about this class or to register click here:

https://overdrive.zoom.us/webinar/register/WN_53H2QbBTtSmK-ekDCSaRw

Getting Started with Libby

Tuesday April 6, 2021 at 2:00 pm

Thursday May 13, 2021 at 11:00 am

Wednesday June 9, 2021 at 2:00 pm

To learn more about this class or to register click here:

https://overdrive.zoom.us/webinar/register/WN_P80ZIHLDraGhi3cdKSRDsw

April Membership Meeting

The next SAILS Membership meeting is scheduled for 2 p.m. Wednesday, April 14. The meeting will be held via Zoom.

Agenda items will include:

- Discussion of whether to resume some pre-COVID procedures.
- Approval of recommendation for future directions of the SAILS Digital History Collection.
- Final approval of line item adjustments in the FY22 budget and action plan.

More details about the meeting will be forthcoming on the director mailing list.

Cataloging Associate Job Posting

By Kathy Lussier

SAILS has a job opening for a full-time (35 hours per week) cataloging associate. SAILS is a forward-looking, member-driven, non-profit organization that provides resource sharing to meet patron needs through cooperation, leadership, and technology. SAILS administers the online catalog and circulation system for 73 public, K-12, and academic libraries located in 39 communities in Southeastern Massachusetts.



The cataloging associate performs the daily tasks of the Cataloging Services Department, including processing cataloging requests, error correction, and other duties as assigned. SAILS offers a full benefits package including health/dental, non-matching contributions to a retirement plan, four weeks paid vacation and more.

If you are interested in working with a great staff in a team-oriented environment to help the libraries that make up the SAILS network, please check out the posting at <https://www.sailsinc.org/cataloging-associate>.

Interested candidates should submit a cover letter, resume, and three professional references in PDF format to employment@sailsinc.org with the subject line: Cataloging Associate. The application closing date is April 16, 2021.

Network Stats March

Circulation (no Overdrive):

Total Items Circulated: 204,395

Items Loaned between SAILS Libraries: 72,054

OverDrive Circulation to SAILS patrons:

Ebook: 37,221

Audio Book: 18,061

Video: 51

Magazines: 1,720

Database Size:

Titles: 1,129,989

Items: 3,422,007

Total Patrons: 403,327

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