



NETWORK NEWS - DECEMBER 2022



Best Wishes Chelsea!

Please join us in sending best wishes to SAILS Technical Services librarian Chelsea Fernandes as she moves on to her new position as Digital Services Librarian at Bridgewater State University.

Chelsea started at SAILS in January 2020 and had two short months to get acclimated into the position when COVID-19 sent us all home to work remotely. She has been a key resource to our K-12 school libraries as the primary person to load vendor records, handle the end-of-year school processing, and load student/teacher records at the start of the year. She also managed the SAILS Overdrive collection and took Overdrive training on the road to libraries to assist them with their management of Advantage collections. She took primary responsibility for writing the cards that are in the circ tip boxes we've been delivering to libraries, coordinated the Kanopy purchase, and also was the manager of the SAILS Digital History collection.

Chelsea concentrated in Archives Management when she received her Masters of Library and Information Science from Simmons College. I know she is excited about putting those archivist skills to greater use in her new position at Bridgewater.

We will miss Chelsea at the network, but are happy for her as she takes these next steps on her career path.

Search Results for Everyone!

We have completed our consulting project to improve searching in Enterprise by allowing patrons to find records with common everyday terms that may not match the formal subject headings in the record. They can also find records for authors by their pseudonyms or former names. This allows patrons to more easily find records when they may not have used the correct subject term in their search. This also works for authors.

The "See From" references from authority records are searched, so the deadnames will automatically be searchable, though not displayed in the author facet or the record. A deadname is the birth name of a transgender or nonbinary person who has changed their name as part of their gender transition. This seems to have improved discoverability for subjects and authors where the authorized name differs from the words patrons use in their search.

An example of this is the search for "Buried treasure" vs. "Treasure trove". Most people wouldn't think to search for the authorized term, but now you'll find what you're looking for, even if you put in commonly used words for the subject. Another example is finding all the titles for both "Roberts, Nora" and "Robb, J.D.", even if you search just one or the other.

You can try this out yourself by doing a search for a subject where you may not know the authorized heading and see what you get. We've heard many requests for an easier way to find LGBTQ titles and a keyword search will work, but now, if someone types in transphobia, they'll get more relevant results. Here are the cross-reference subjects that would have been ignored, prior to this update: Anti-transgender bias, Cissexism, Discrimination against transgender people, Transgender discrimination, Transprejudice, and more.

Patron would have had to know these subjects and, in order to find the books on transphobia: Self-acceptance, Body image, Human rights, and self-perception. There is no updated subject heading that would make it easy to find. Hopefully, now there is.

sails.ent.sirsi.net/client/en_US/lib/sear

▼ Subject

☐ GLBT people (14)

☐ GLBTQ people (14)

☐ Gender minorities (14)

☐ LBG people (14)

☐ LGBT people (14)

☐ LGBTQ people (14)

☐ Lesbian people (14)

☐ Non-heterosexual p... (14)

☐ Non-heterosexuals (14)

☐ Sexual dissidents (14)

☐ Nonfiction (9)

☐ Sociology (9)

☐ Same-sex attraction (5)

☐ Angeles (Calif.) (4)

☐ Angelopolis (Calif.) (4)

► More

► Fewer

► View All

► Collapse All

▼ Subjects

☐ Internet videos. (4)

☐ African American wo... (2)

☐ African American wo... (2)

☐ Civil rights workers ... (2)

☐ Educational films. (2)

The **Ultimate Library Roadtrip** is coming April 2023 and we need your 3 unique things in your town or library that people will want to drive there for! The best ice cream? A Great Walking Trail? A cool diner or store? Let us know. We are waiting for 14 libraries to respond to our survey. Please do so by Wednesday December 7 to be included in the webpage information list for the Ultimate Library Roadtrip. [The survey can be found here](#) And take a look around for a small stamp to use on the map when people come to you on their travels. It should be about 1/2" - 3/4" in size to fit on the map. We will be asking for your library events for April 18 - 29 in February 2023.



Advantage Weeding in OverDrive

By Chelsea Fernandes

What is “weeding” in OverDrive and why does it matter? Weeding in OverDrive refers specifically to Metered Access titles. The reason for this is because only the MA titles can expire. Titles that expire do not immediately get removed from the patron-facing view. Why not? Historically, this has been for two reasons:

1. Copy level control is not something that was available in OverDrive. Thus, if one copy of the title expired, it was not always the case that all of the copies had expired. For a Consortium, we don’t want things to be automatically removed from our site just because one copy has expired when we still have 10 other copies available.
2. Titles can (and often do) expire with holds. If this is the case, we may decide to repurchase the title. There is no reason to remove it if we are going to buy another copy.

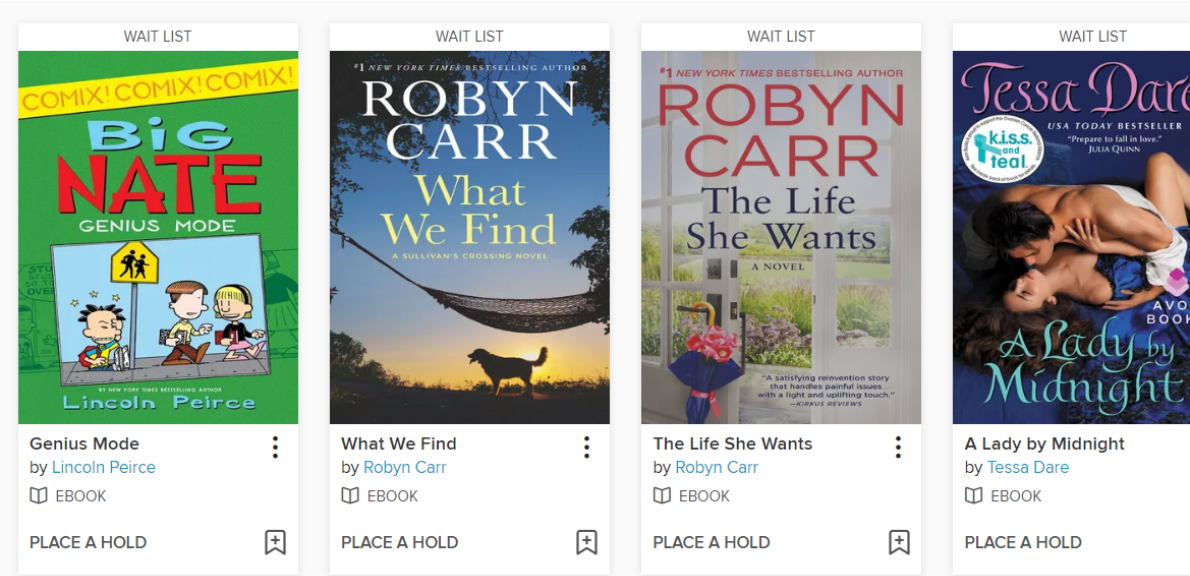
This is where “Weeding” comes in. Weeding in OverDrive is simply the process of removing the item from the patron-facing site. Up until recently, Advantage libraries were not able to weed their own collections. This was something that only the Consortium could do. This has been a semi-manual process with various automating options that were unsatisfactory for the consortium. One serious drawback was that if we weeded an item, Advantage Libraries could not purchase that item without asking us to “Unweed” the item. You may recall seeing an “Unweed” button in Market Place. We have long advocated for the change that OverDrive has recently implemented, albeit in a slightly different manner than it ultimately appeared. As a network, we chose not to automatically weed everything that had expired with no holds because we didn’t want to make that choice for our members. Therefore, weeding has been done manually, on items we felt were unlikely to be repurchased. The change we have long

been asking for from OverDrive was simply an Advantage “Unweed” button. However, what we have now is Advantage Level Weeding.

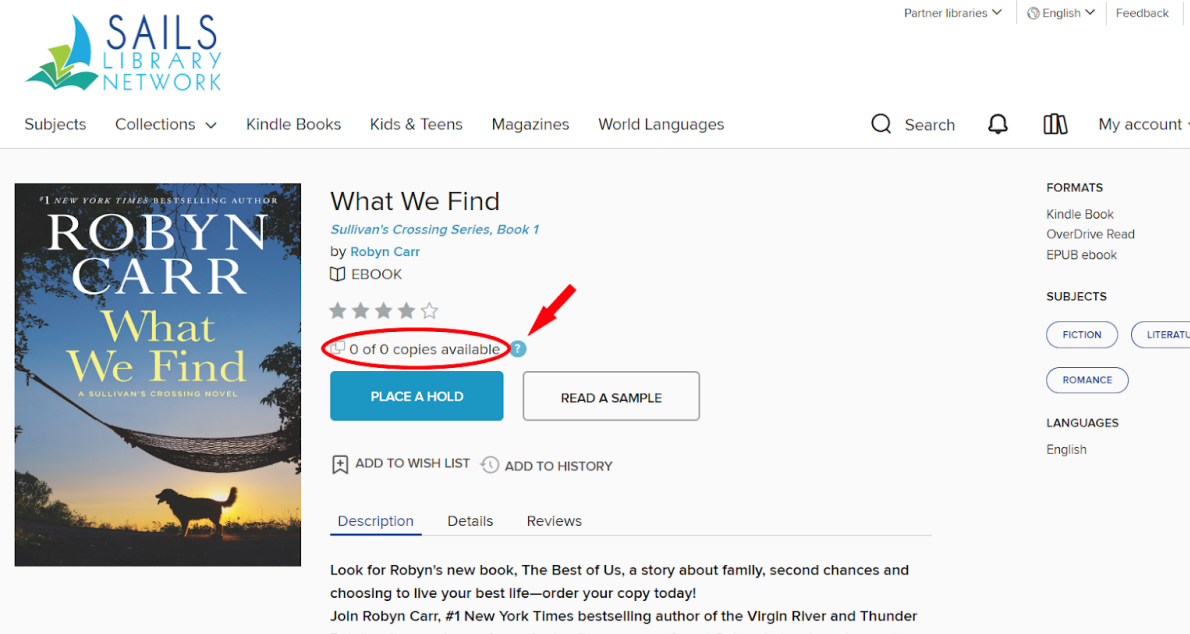
Advantage Level Weeding

The Advantage Level Weeding change is the first step in giving libraries more Copy Level control, which is appreciated. However, it has changed a few pretty important things.


1. When SAILS weeds an item it no longer is removed from the patron view unless *every Advantage library that has ever owned a copy also weeds it from their collection.*
1. This is the big change. This is where you all come in. Unless everyone starts paying attention to their expired titles now we will have a Zombie Hold Apocalypse.
2. What is a Zombie Hold?
1. Zombie Holds are holds that exist on titles that have expired. They are called “Zombie Holds” because if we don’t actively search for them, those holds will just continue to exist on “dead” titles. Patrons will place holds and they will never get their items because no one knows there are no copies to fill the holds.
2. **When titles are not being weeded they appear as available to your patrons.**



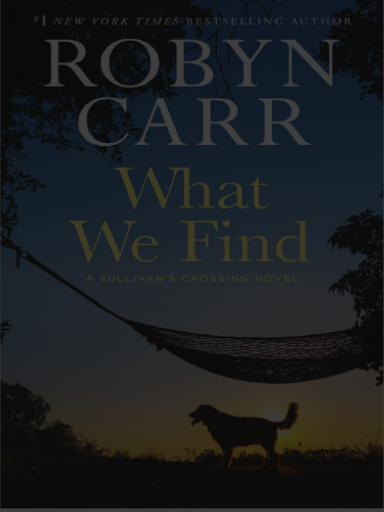
These are all titles in the “Last Chance” list on the OverDrive website. Two of them are expired. There is no way for a patron to know which two until they click on them. When they do they will see this:



The “Place a Hold” button is still there and very much functional. The only clue that this is not actually available is the “0 of 0 copies available” above the much larger “Place a Hold” button. There is a small blue circle with a question mark inside of it, that when clicked will display this information:



SubjectsCollections ▾Kindle Books



What We Find

A SULLIVAN'S CROSSING NOVEL

Library copies: 0
People waiting: 4

0 of 0 copies available

PLACE A HOLD

READ A SAMPLE

ADD TO WISH LIST

ADD TO HISTORY

DescriptionDetailsReviews

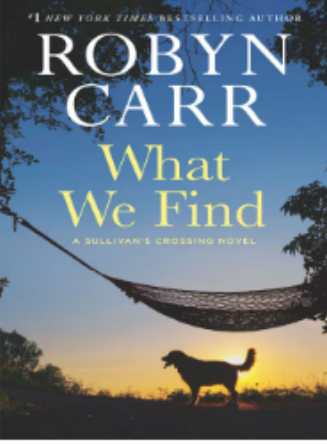
Look for Robyn's new book, The Best of Us, a story about family, second chances a

However, if they do not notice the little blue circle or do not click on it and instead click on "Place a Hold" they will be brought to this screen:

PLACE A HOLD

What We Find

EBOOK



The license for this title has expired. You can still place a hold on it, and your hold will move forward if the library purchases the title again.

PLACE A HOLD


CANCEL

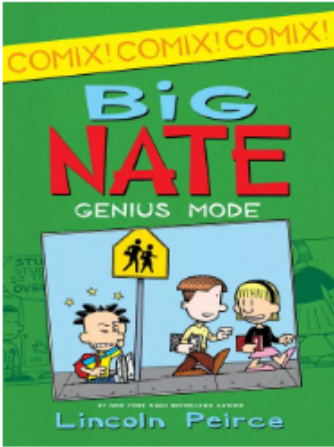
This does inform the patron that the title is expired, however, it is very similar in appearance to placing a hold on an item that is not expired:

PLACE A HOLD

×

Genius Mode

 EBOOK



Fill out the form below to place a hold on this title, and SAILS Library Network will contact you when it's available.

Email address

Confirm email address

PLACE A HOLD

CANCEL

It could easily escape someone’s notice.

1. Zombie Holds used to just be a Consortium problem. Advantage Libraries couldn’t weed their own collections so the Consortium was monitoring the issue.
2. Advantage Level Weeding has changed that.
3. What can Advantage Libraries do?
 1. Set up the suggested Automatic Weeding Plan listed below:

Suggested Automatic Weeding Plan for All Advantage Libraries

The following will show you how to set up an Automatic Weeding Plan that weeds all titles that have expired, even with holds. If you are planning to keep up with your expired titles you might consider a plan that only weeds expired titles without holds. However, this is buggy and not working at 100% yet so be aware that some of your weeded titles will still likely have holds. SAILS plans to implement this plan and use a variety of tools to track weeded titles with holds instead. If we repurchase a title we can then unweed it.

To create an automatic weeding plan:

1. Sign into [OverDrive Marketplace](#).
2. In the Admin drop-down, select Weeding.
3. Select Create plan.



4. Choose criteria to determine which titles to weed. You can choose to weed:
 - All expired Metered Access titles or only certain types of Metered Access titles
 - Titles that are no longer for sale in Marketplace
 - Titles with no active holds

Note: Titles must meet all of your specified criteria to be weeded. For example, if you set your plan to weed expired titles and without active holds, titles must both be expired and have no active holds to be automatically weeded.

5. Click Save, then Save this plan to confirm.

This will get you to the plan itself in Market Place.

OverDriveMarketplace™

Search OC/OU & MA by title, author, series, or publisher

SHOP
One Copy/One User & Metered Access

INSIGHTS

ADMIN

CURATE

NEWS

BILLING

SUPPORT

FEATURED

Marketplace settings

Marketplace users

Libby layout (BETA)

Advantage Plus

Library site admin

Weeding

Local content

MARC preferences

Automatic weeding plan

Titles must meet all of your specified criteria to be automatically weeded. For example, if you set your plan to weed expired titles and titles without active holds, titles must be both expired and have no active holds to be weeded.

This plan will only weed copies owned by the shared collection. Copies purchased by an Advantage account (including Advantage Plus shared copies) can only be weeded from the Advantage account.

Notes:

- Your plan will run daily and hide eligible titles within 24 hours.
- To restore a weeded title to your collection, go to **Search collection** to find and unweed it. Please note your plan will automatically weed titles again if they meet the plan's criteria.

Holdings

* Do you want to weed all expired titles?

☒ Yes; weed all expired titles

☐ No; weed only these kinds of expired titles:

Collection development policies

☐ Only weed titles that are no longer available for purchase in Marketplace.

User demand

☐ Only weed titles with 0 active holds.

SAVE

RESET

CANCEL

This is what it will look like right before you click “the green “Save” button at the bottom.

This will make sure that your library is weeding everything that has expired, even with holds. If you do not want to weed titles with holds, under “User Demand” also select the option that says “Only Weed titles with 0 active holds”.

Also, keep in mind that it says “Active holds”. In addition to being buggy, this plan does not look at items with suspended holds.

Increase to Minimum Out-of-State Fees

As of January 1, the minimum fee that is required for out-of-state patrons to request materials from all SAILS libraries will increase to \$75 per year.

SAILS Membership voted in October to approve a new formula for establishing the fee to be based on the total operating budgets of all SAILS public libraries divided by the total number of SAILS public cardholders, rounded up to the nearest \$5.

Any library that uses the NOMASS profile will see the increase when they renew cards for out-of-state patrons or register new out-of-state patrons on January 2, 2023 or later. Libraries that use a profile that charges a fee higher than \$55 but lower than \$75 will also see an automatic increase to their fee.

Here are some reminders on our out-of-state patron policy:

- Libraries may choose whether or not to issue library cards to out-of-state borrowers.
- These cards are only good for 12 months.
- Libraries may choose to issue in-state cards to out-of-state residents who work in Massachusetts or attend school in Massachusetts.

Patron notification reminders

Now that we're a couple of weeks into the change with patron notifications, I know circ staff at some libraries are hearing from patrons asking about this change.

Now is a good time to reiterate the reasons that SAILS membership voted last spring to remove titles from patron notices so that you can better explain this change to your members.

Sending confidential information is insecure. Emails are easily shared with others, an email account can be hacked, and messages may be easily accessible to people who are in close range of your phone or PC if you step away from those devices. Many patrons may not have a problem with others seeing what they are reading, but we also have patrons who are checking out sensitive materials. We need to do what we can to protect the confidentiality of those patrons.

Laurie wrote a post explaining some of these issues that can be shared with your patrons - <https://sailsinc.org/valuing-patron-privacy/>. Below are some FAQ’s included in our privacy audit report that better explains the reasons behind the recommendations that went to Membership.

Circ staff can best help patrons with this change by demonstrating how they can access their Enterprise account from the email notification. SAILS worked with SirsiDynix so that the user

barcode would be embedded in the link, meaning patrons only need to enter their password to view the list of items that are on hold or are due to be returned to the library. It is an additional step, but this step is enough to prevent somebody with unauthorized access to an email from viewing these titles.

Please email support@sailsinc.org if you have any questions.

General Privacy Audit Questions

Why is SAILS doing a privacy audit?

The public needs to feel assured that the information they are obtaining from the library is not being mishandled or shared with others. It is this assurance that builds trust in the library and allows patrons to feel comfortable with borrowing sensitive materials or using library resources to look up information that they don't want others to know about. "Privacy is essential to free inquiry in the library because it enables library users to select, access, and consider information and ideas without fear of embarrassment, judgment, punishment, or ostracism."
(<https://www.ala.org/advocacy/privacy>)

SAILS has a long history of doing what it can to safeguard patron privacy. However, the online privacy landscape is constantly changing, and libraries need to regularly review their practices to ensure that they are keeping up with the current standards and recommendations.

Do patrons care about privacy?

Different patrons will have different thresholds for what information they are willing to share and with whom they are willing to share that information. A patron who had previously been open about their borrowing habits may change their opinion if they suddenly find themselves in a position where they are using the library for medical information or to get assistance with a legal problem. Libraries and librarians have a legal and ethical obligation to maintain confidentiality for all of these patrons. When patrons do not feel that the library is maintaining their privacy or keeping their information confidential, it can have a chilling effect on their use of the library and the information they access.

The public often becomes more concerned about privacy after a data breach occurs or after learning that data has been mishandled. In the wake of the 2018 revelation of Cambridge Analytica's misuse of personal data collected from Facebook, the public showed an increase in this concern. A 2019 survey from the Pew Research Center found that a majority of Americans were concerned about the way their data is being used by companies (79%) or the government (64%). If a data breach were to occur at SAILS, the network would be better able to maintain the trust of patrons if we show that we have only collected the information we need to support library operations and have put practices into place to protect the confidentiality of the data we do maintain.

Questions Related to Patron Notices and Reports

Why is the network concerned about patron notices and reports with PII sent via email?

ALA discourages sending any personal information through insecure communication, including email, text messages or postcards. There are several security risks to using email:

- Email passes through many networks and servers. Hackers can intercept information in these emails and their attachments, unless they are encrypted and password protected.
- Emails are easily forwarded, and the original email text is also included in replies. As an example, if a patron has a question about a notice, they might reply to the library, which then may forward the question to SAILS. Each time that notice is replied to or forwarded, a copy of the original message with the PII is saved in somebody's Inbox or Sent folder, putting it at risk of being shared with people who do not need to know whatever personal information is contained in the message.
- Email accounts can be accessed by those who are not the intended recipient of the message. Email hacking is common, but an account could also be accessed by other family members or friends.

Why is the Task Force recommending that titles/authors be removed from email notice?

In essence, the Privacy Audit Task Force is looking to maintain the confidentiality of materials that a patron is accessing or borrowing. This is also the reason why the network has never included titles in the notices that are sent through the automated voice notification system. In talking through this issue with the Task Force and the SAILS Board, the following scenarios were considered as important factors in this recommendation:

- the young adult who does not want their family to know they are borrowing LGBTQ titles,
- the person who is borrowing items related to a sensitive medical issue,
- the spouse in a violent marriage who is seeking information on divorce or reading other material that their partner considers to be objectionable.

The notices will include a direct link to the patron’s account where they can log in to find more information about the title that is on hold or overdue. Titles will continue to be listed in Assumed Lost notices and bills sent through the postal service.

Highlights From the Request Records Review at November’s Technical Services Roundtable

Jennifer Michaud

At the recent technical services roundtable, we discussed information to add to request records, focusing specifically on books. If you didn’t attend the roundtable, but you create request records, please take the time to review these reminders listed below. We want to make sure that you’re not spending too much time adding information that isn’t necessary, but that you do add information we need to edit SkyRiver records that we load into Workflows. All of our request records handouts are on the SAILS staff website: <https://sailsinc.org/cataloging-desktop/>. The link for the Creating Request Records for Books handout is: <https://sailsinc.org/cat/BooksRR.pdf>

General Reminders about Request Records

- Save time and don’t add any fields that aren’t already part of the request record template, including the series field
- Any extra fields that are added will not be part of the reports that we use to catalog request records and ACQ records
- There is *one exception*: you can continue to add extra General Note 500 fields for request records for kits
- Don’t copy and paste information from other library catalogs, including OCLC’s Worldcat
- Information from these other catalogs, including Worldcat, can be incomplete or incorrect and may not accurately reflect the copy you have
- We need the information taken from the item in hand

We reviewed the fields in the request record template for books to help you save time (and typing).

ISBN 020 field

- You only need to enter one ISBN even if your book has both the 10-digit and 13-digit ISBNs
- You aren’t required to put (hc) or (pbk.) after the ISBN, but you can do this if you’d like

UPC 024 field

- You don’t need to enter the ISBN in this field; you’ve already entered the ISBN in the ISBN field

Personal Author 100 field

- This is the field where we have seen a lot of extra information being added
- You **should only enter one name** and enter it as:
- Last name, First name, Middle initial or Middle name
- You don’t need to enter any other names listed on the title page; only the first person’s name
- Save yourself time and **don’t put two names in this field**

Title 245 field

- Only enter the title in this field (it’s okay to enter the series, too)
- Don’t add any other information, such as the names of authors, illustrators or translators
- It’s okay if you put the series name and number in the title field, but **you are not required to enter the series name at all**
- Many of you have been adding the series name and number at the end of the title in parentheses and that is okay
- For example: Cooking with Chef Octopus (Animal chefs, 5)
- Some of you have put the series name at the start of the title and that is okay, too
- For example: How the World Worships: My Life as a Jew

Edition 250 field

- You only need to enter the edition statement and you can use abbreviations
- For example: 1st ed. (even if the book says First edition)
- Don’t enter anything related to a printing statement

Publication Info. 260 field

- You only need to enter the publisher’s name and the most recent date on the item
- You don’t need to add the city name of the publisher

Physical Description 300 field

- We’ve been mentioning this field a lot lately, but it’s because SkyRiver records often don’t include any of this information
- Some recent request records (especially for books) have also been missing some or all of this information
- Don’t forget to enter the full physical description for books; you can use abbreviations
- Illustrations have been missing in many request records, including for graphic novels
- “Illustrations” is used to refer to any drawings, paintings, photographs, or other images that are in a book
- Maps should also be included in the physical description
- Don’t forget to indicate if the illustrations and/or maps are in color
 - Example: A book with 32 pages, color illustrations, black and white maps, and is 28 centimeters in height:
 - 32 p. col. ill. maps 28 cm.

Example: A book with unnumbered pages, black and white illustrations and is 24 centimeters in height:

- 1 v. (unpaged) ill. 24 cm.

Example: A book with 109 pages with mostly color illustrations and some black and white illustrations and is 26 centimeters in height:

- 109 p. ill. (mostly col.) 26 cm.

SAILS Cataloging Cleanup Projects Are on Hold

Jennifer Michaud

With Chelsea’s departure, the SAILS Cataloging Department is back down to two people and needs to scale back working on certain projects. For the foreseeable future, we are putting a hold on all major cleanup projects. This means that we will not be able to do projects involving significant merges of older titles or cleaning up (or adding) series titles or numbers to records. While we would love to be able to work on these projects (both Stephanie and I enjoy doing them), we are also trying to reduce the backlog of current records while still providing you with assistance with any questions that you have. We will continue to work on all of your error reporting forms, emails, and duplicate titles reports as usual. We apologize for any inconvenience this may cause. We are always here to answer any of your questions, so please don’t hesitate to reach out to us at catsupport@sailsinc.org.



SAILS has a job opening for a full-time (35 hours per week) Digital & Member Services Librarian. 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 70 public, K-12, and academic libraries located in 39 communities in Southeastern Massachusetts.

The Digital & Member Services Librarian works under the supervision of the Assistant Director for Technology Services to support member library use of SAILS systems in the areas of circulation, reports/analytics, acquisitions, and digital collections. The team-oriented and customer-friendly individual in this position will respond quickly and accurately to requests from member libraries, troubleshoot problems, maintain documentation, and manage the SAILS digital services collection, primarily Overdrive. This position will also work with SAILS school libraries to manage end-of-school-year processes and loading of student/faculty records.

If you are interested in working with a great staff in a team-oriented environment to help all SAILS libraries, you can find more details and submit an application, along with a cover letter and resume, at <https://sailsinc.org/digital-member-services-librarian/>.

Notice of Scheduled Maintenance - Symphony

WHEN: Thu, 08 Dec 2022 - 4:00 am EST

DURATION: 1 hour

WHY: Apply the latest operating system patches to your Symphony server.

IMPACT: During this maintenance, your Symphony server will be unavailable to staff and patrons.

Save the Date

Massachusetts: Please join us for our first in-person Legislative Breakfast since 2020!

2023 Southeastern Massachusetts Libraries Legislative Breakfast Massachusetts: Ensuring Your Right To Read

Friday, January 20, 2023
8:00 AM - 9:00 AM
Somerset Public Library
1464 County St., Somerset, MA
(Snow Date is Friday, January 27th)

Representative Pat Haddad will be speaking

Our mailing address is:
Legislative Breakfast Committee
c/o SAILS Library Network
10 Riverside Drive, Suite 102
Lakeville, MA 02347
email: legbreakfast@sailsinc.org

Highlights of the October Membership Meeting

- The Board approved a request from Massachusetts Maritime Academy to be exempt from the new patron notification policy due to the different needs of an academic library.
- The Board discussed the possibility of eliminating or reducing meeting space from the SAILS office now that most meetings are held virtually. The Board suggested that the network may want to consider just one or two in-person Board meetings per year with Membership meetings continuing to be hosted at libraries.
- The Board approved a revision to the recently-revised Digital Content Collection & Lending Policy. Patrons from libraries that are participating in the SAILS Overdrive collection through the MLS Commonwealth eBook Collection program can now challenge materials through this revision.
- The Board approved the withdrawal of Massachusetts Maritime Academy library from SAILS. MMA will be moving to HELM, a consortium for public higher-education libraries, as of January 2024.
- The Board approved a revision to the SAILS hybrid work policy to allow employees living in Rhode Island to work from home. SAILS Executive Director Kathy Lussier verified that the organization is meeting RI labor law requirements to allow employees to work remotely from this state.
- The Board suspended adding new digital objects to the SAILS Digital History Collection and to grandfather existing collections. Libraries that are digitizing their collections will be encouraged to work with the Digital Commonwealth or the Internet Archive.

UPCOMING EVENTS

Barcode Order Placed	December 14th
SAILS Board Meeting	December 21st via zoom
Christmas Eve - SAILS Office closing at noon	December 23rd
Christmas Observed - SAILS Office Closed	December 26th
New Year's Day Observed - SAILS office closed	January 2nd

November Statistics

Circulation (no Overdrive)
Total Items Circulated: 252,681
Items Loaned between SAILS Libraries: 52,730

OverDrive Circulation to SAILS Patrons
Ebook: 31,938
Audio Book: 22,972
Magazines: 2,522

Database Size
Titles: 1,059,782
Items: 3,116,915
Total Patrons: 263,732





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