# SAILSNetwork News

This newsletter is again using Bookletter's recommended method of stacking multiple messages to create the one ePage. Since I already created the messages to use for last months newsletter, This month all I'm needing to do is edit the existing messages. This is really the same method used for creating webpages in many content management systems by using content blocks. They can be easily moved up and down and modified without having to change an entire page. If anyone is interested in using this method and has questions on how to do so, please let me know - Laurie ([llessner@sailsinc.org](mailto:llessner@sailsinc.org))

# Notes from the SAILS October Membership Meeting

Representatives from 28 SAILS Libraries met at the Mattapoisett Free Public Library for the October During this meeting the FY17 Budget was approved. The budget includes funds to increase bandwidth for libraries currently using SAILS supplied Comcast lines.  It is the recommendation of the Budget Committee that a study group be formed to examine how SAILS is currently using funds for Electronic Resources to determine if they could be applied more effectively.  Debby Conrad reported on the significant impact the state budget cuts to line item 9506 are having on the SAILS operating budget. She urged members to contact their legislators to urge restoration of funding to that line item.  A chart showing the dramatic decrease in funding is Total 9506 Funding for Telco and Resource Sharing is below:
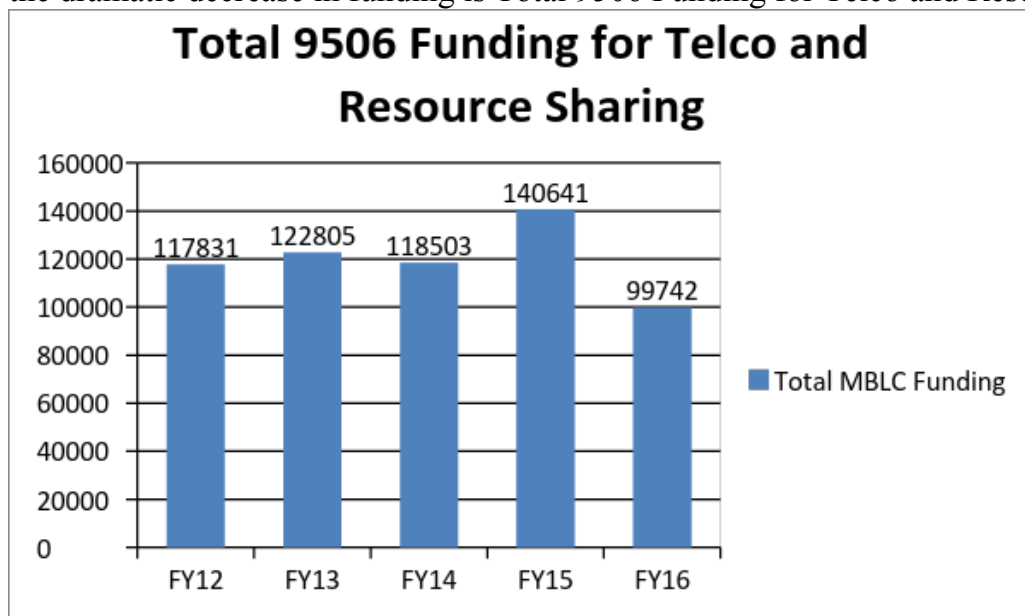
The Membership voted to accept several recommendations from the network Circulation Policy Committee:

A change to allow adult and senior card holders be able to have a maximum of 30 active holds. This is an increase from the 20 holds currently allowed. Staff, Juv, and other special patron profiles will not be increased. No changes for our K-12 or academic members.

Libraries are asked to use DVD-Set as an item type for multi-type DVD sets, particularly those for TV Series.

SAILS will begin generating additional bills for lost items instead of the one currently sent. Bills will be sent at 60 days and 90 days.

The network will begin providing directors with monthly reports of patrons owing more than $100 in fines.

Jocelyn Tavares (Dighton) announced that the date for the Breakfast is Jan 29, 2016 with a snow date of Feb 5, 2015 and will be held at the Lakeville Public Library. Senator Mike Rodrigues will be the keynote speaker.

The Membership approved a recommendation from the Overdrive Committee that the network assess libraries for supplemental funding of the network Overdrive Collection. The additional funds will be used to boost the contents of the collection during the holiday season. The network will issue invoices to members and the amounts will be formula based.

Debby Conrad reported on the status of Administrative Support Specialist Position. The Personnel Committee will be meeting after this meeting. The advertisement closed on Friday October 16, 2015.

Laurie reported that the PubPac committee met to discuss not just the OPAC but also the website which has been streamlined a bit. Laurie is working on the addition of the Accelerated Reader slider. An accelerated reader room will also be created. Debby Conrad reminded the directors that arrangements have been made to have a consultant come in for website design. The first workshop has been held and was very good. There are openings for the future workshops.

The meeting was followed by a presentation of Ebsco's Flipster which is a digital magazine product.

## Circulation Roundtable Notes

These are also posted on the SAILS Website

Compilation of Meeting Notes

Notes from the Fall 2015 Circulation Roundtables

**Credit card payments**

- Patrons can pay for outstanding fines (any type) if they are logged into an Enterprise instance for

any public library.
- Patrons may choose which fines they want to pay
- The system accepts major credit cards including Visa, Master Card, Diners Club, and American Express.  Debit cards may be used if they have a credit card symbol but otherwise they are not accepted.  PayPal accounts are also not accepted.
- Patron's accounts should be cleared as soon as the payment is submitted and the patron receives a confirmation number.  Patrons may select email notification of payment submitted but they must enter their email address manually.  The system doesn't look at their record for the email address
- Problems have been reported if
    - Patrons exit the browser before they received confirmation that the payment has been processed and
    - Family linked cards are not always cleared.  When problems take place the patron's card is charged but the patron record is not cleared.  If this is reported to staff, email [support@sailsinc.org](mailto:support@sailsinc.org) and SAILS can manually clear the record.  Transactions are also checked every morning and patron records that were not updated will be updated then.
- This is a web based service only - staff members should not touch credit cards.
- Billing libraries receive reimbursement from SAILS once a month except in the case of lost or damaged items in which case the owning library is reimbursed.
- There are issues when a patron returns a lost item after they have paid for it.  SAILS should be contacted to see what if anything can be done.

## Circulation contacts - moving to generic accounts

The Circulation Policy Committee recommended that each library establish a generic email account for a standard method of contacting the library regarding circulation issues.

An email was sent to library directors asking for his/her preference.

The choices for your library are as follows:

1. *recommended - A group account can be created where 1 or more people are members of the group. The emails will be forwarded to all group members. If a staff member leaves the library, SAILS needs to remove the person's email from the group. If someone from the group goes on vacation, other members will still receive the email.

2. A generic email address is created where multiple people will have access to read the email - either using an email client or the Gmail interface. This would be a second account that needs to be checked (con) or it could be set up to forward to individual accounts, similar to a group (pro). If someone goes on vacation, others have access to this account (pro). If someone leaves the library, others have access to this account (pro).

3. An individual can be automatically forwarded emails from a generic email address (pro). If the staff member leaves the library, someone else will need to be set up to receive the emails (con). If the staff member goes on vacation, someone else needs to have access to that email account (big con).

## Patron Circulation History

Patrons with a large number of items in their charge history can experience problems logging into their account. Libraries may experience long delays when trying to access the patron's account for circulation. SAILS can trim the number of items in a patron's record to reduce response time.

Initially the Circulation Policy Committee had recommended that the network set a threshold for the

number of items that can be kept in Charge History but upon investigation the issue is more complicated. SAILS staff have followed up with SirsiDynix.

**Bills for lost items**

SAILS will be sending out 2 follow up bills for items set to lost that have not yet been paid for or returned.  These bills will be sent out once a month.  Libraries will be able to create their own message.

- TIP Use UND in user category 4 (usercat4) to indicate a patron's address is undeliverable.  This will prevent notices from being printed.
- TIP  SAILS can produce reports that will list patrons who have accumulated large amounts of fines - for example over $100.00. This report can be produced on demand or on a regular schedule. Requests for this report should be sent to support@sailsinc.org

**Items set to Claimed returned reports**

All public libraries receive a list of items that had been set to claimed returned 90 days before the report was generated.  The report is run once a month.  Libraries are asked to follow up on these items and either bill the patron for the lost item or set it to missing.  This prevents these items from being flagged as available to fill holds.

Libraries are reminded they must contact the owning library of an item before setting it to claimed returned.

**Billing for damaged items - circulating library or owning library?**

Network policy is that patrons should receive invoices and communications from libraries that they use. Circulating libraries should invoice patrons for items that are damaged.  The network has a procedure for returning these to the owning library.

http://www.sailsinc.org/Corpdocs/CircPolPro.pdf - page 6

If the owning library receives something that is damaged and it can be determined it was done by the last user it should contact the circulating library and request that the patron be invoiced for damage.

There is a problem item slip that should be used when returning a damaged item.  http://www.sailsinc.org/circulation-desktop/

**Number of holds - increasing the number.  Days on hold shelf (how that works)**

The Circulation Policy Committee recommended that Adult and Senior card holder profiles be updated to allow up to 30 holds.  This change was approved and is now in place.  The network will not be advertising this change.

If libraries are concerned about space, the network can modify the number of days items stay on the shelf list.

**DVD-Set item type**

The Circulation Policy Committee has recommended that all libraries use the item type DVD-Setfor DVD sets with large numbers of DVDS (specifically TV Series).  It was noted that due dates are setby the CIRCULATING library and not the owning library and it is important that patrons have a

consistent due date for similar items.

**Registering patrons who have moved from one SAILS library to another - when to issue a new card -**

- If a patron moves from one SAILS library to another the recommendation is that the library issue the patron a new card.  The old patron record should be updated with the new information rather than creating a completely new record.
- Patron barcodes are used for authentication for licensed databases so if a patron indicates they want to use another library for service but they haven't moved the library in the BASIC Tab of the patron record can be updated.  This will mean the patron can use this library for a pick up location but won't be using the resources of the library not in their home community.
- If a patron does not have a library card at all in SAILS they may register at any SAILS library.

**\*TIP -** If a patron needs a replacement card and doesn't want a new id number a library may use its barcode duplicator to make a copy of the original barcode and put that on a new plastic card.  This eliminates the need to update the patron record AND update the patron's Overdrive account.

Sample patron registration form (thanks to Lakeville Public Library) [http://www.sailsinc.org/patron-records](http://www.sailsinc.org/patron-records)

**\*TIP -** The network strongly recommends that each library establish a record retention policy regarding paper copies of card applications.  Maintaining large paper files of patron applications that are not secured is a threat to patron confidentiality and privacy.  Libraries should maintain paper records for as long as it takes to make sure the information is correct and then destroy the paper records.

**Announcements**

Two Searching for Circulation Workshops are scheduled to be held at SAILS in December.
December 9 - 10 a.m. - [Register](Register)
December 10 - 1 p.m. - [Register](Register)

Circulation Users Meeting (all libraries) - June 7 at 10 a.m. (Lakeville Public Library)

# Item Category Study Committee Formed

The SAILS Membership has formed a committee to study the consolidation of item categories into broader sets using one of the new item categories that have been added to the software.  At the present time libraries are allowed to use whatever Itemcat1 that is available.  Itemcat2 is used to identify audience - Adult, Juvenile, and Young Adult.  The system now has 3 more item categories.  Because Itemcat1 is often very unique to an individual library it is difficult for other libraries to compile meaningful circulation data at the end of the year.  The purpose of this committee will be to develop a plan to merge multiple categories into a larger grouping to enhance members' ability to produce meaningful usage data that includes items both within their collections and those borrowed from other members.  The committee is chaired by Melissa Campbell (Plainville).  Committee members include Lynne Antunes (Dartmouth), Dorothy Stanley-Ballard (Freetown), and Peter Fuller (Seekonk).  Debby Conrad and Kristin Slater will be SAILS staff liaisons.

# New Baker Taylor Ordering Service

Baker and Taylor is updating their ordering platform and it is now called Title Source 360.  If your library hasn't received notification about this coming change, you should be hearing from them in the coming month.  They have a number of live webinars scheduled.
 http://www.baker-taylor.com/titlesource360-webinars.html

With this new ordering system, you may have the ability to download on-order records like you can in Ingram's Ipage.  You will need to verify with your sales representative that you have this service.  SAILS is setting up testing and hope to get this service working within the next couple of weeks.  Anyone interested in using Title Source 360 to download on-order records please e-mail catsupport@sailsinc.org

Once the testing is completed, we will send out e-mail and schedule training sessions.

# Overdrive Announcements

## Simultaneous Use Collections

In September SAILS subscribed to 25 Blackstone audiobooks that allow for unlimited simultaneous usage.  In October SAILS added a collection of 25 Tantor audiobooks that also allow for unlimited simultaneous usage.   The new collection is being well received by patrons.  In addition the network has a collection of Gutenberg titles that allow for unlimited simultaneous users.

Overdrive is making a change to how it presents the Gutenberg titles which should increase usage of this important collection.  This a collection of classic titles that are no longer under copyright. They will be integrated into the general Overdrive collection unlike now when patrons must know enough to look for them under a separate search. There will be no limits on usage and no hold lists. SAILS will be adding MARC records to the Enterprise catalog to encourage usage as well. Every title will be available in both OverDrive Read and Open EPUB formats. Reporting on Project Gutenberg content will be included in applicable reports. Project Gutenberg titles can be featured in curated collections.

## Overdrive's Media Station

The network has purchased an OverDrive Media Station (OMS) for libraries in the network to borrow and try out. Currently it's at Middleborough but we're more than happy to put you on hold! We have a large, 27" touch screen, all in one computer that is all set up to use the OMS site. It can sit on a desk and connect to your wireless internet. We encourage you to take a look at the short overview of the product.

# New Overdrive Website coming soon

**Unveiled at ALA and Digipalooza, the new OverDrive is a groundbreaking update of your current website coming soon to your library.** With *blazing speed* and *ultimate ease of use*, you'll experience a completely reengineered platform through the use of improved technology and APIs.

Based on hundreds of millions of checkouts and feedback from librarians and users, the new OverDrive will help you onboard new users quickly and *engage more of your community*. For a sneak preview and to learn more, click to watch the video below:
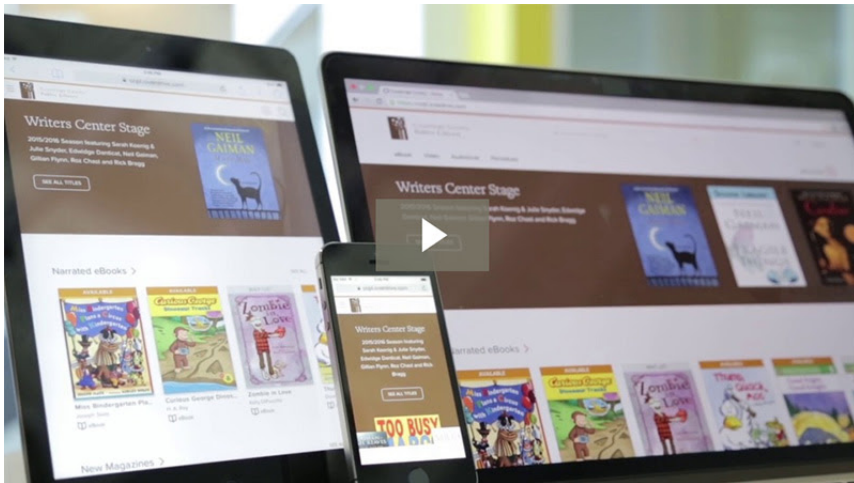
**When will the SAILS Digital Library be updated?** The rollout process for public libraries in the OverDrive network will begin in November and run through early 2016. Overdrive will contact us approximately 4 weeks in advance of our moving to the new OverDrive platform. At that time, we'll also provide helpful information for you to share with your users. **Stay tuned!**

# Shifting SAILS

We'd like to welcome two new school librarians at the network. Gretchen Lopez is leading the library at Wrentham's Delaney and Roderick schools and Rachel Barrett at the Foxborough High School. Rachel

comes from the Old Colony Regional Vocational Technical High School and has also worked in Duxbury.

Contratulations to Manuel (Manny) Leite. Manny has moved from being the director at East Bridgewater Public to heading up the Boyden Library in Foxboro.

And more congratulations and best wishes to Jerry Cirillo, Robin Glasser and Beth Smith on their retirements.

# MobileCirc - Easy Patron Registration

If 2D barcodes are available, you may scan it to auto-fill the **user name** and **address information**.
To enter user information by scanning his/her driver's license
1. Tap Add User.
2. Enter the User's ID.
3. Tap the Scan Driver License Barcode button.
4. Tap the text field in the new window.
5. Scan the 2D barcode on the Driver License.
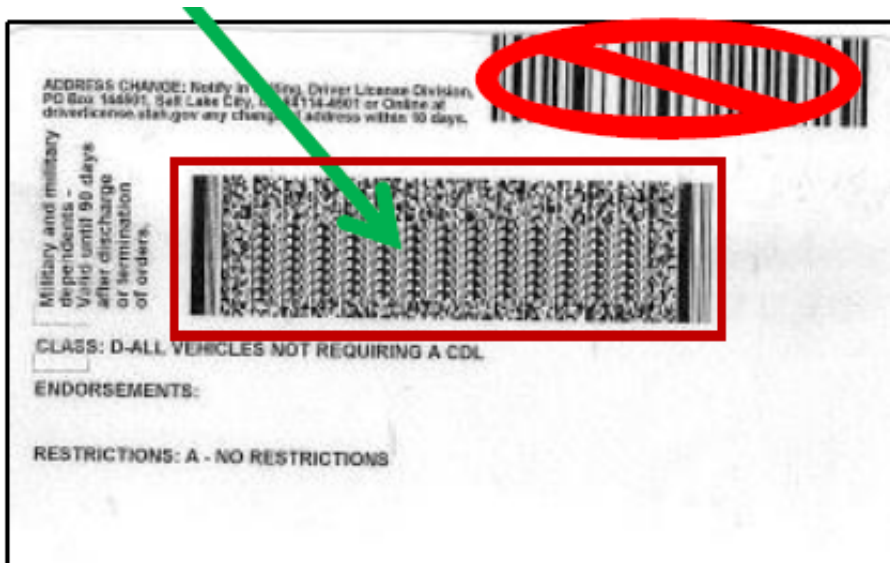


If you're interested in using MobileCirc at your library, contact support@sailsinc.org for more details.

# Upcoming Events

Tuesday November 3, 2015

10:00 AM - 12:00 PM

Website Communications Skills
[Click to Register](Click to Register)

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

This workshop will focus on ways to improve communication on websites.  Topics include overall strategies, how to write for the web, what to think about when using images and how to take advantage of the technology that is par tof any website's content management system.  The workshop will include time to to critique each attendee's homepage with participants contributing suggestions based on what they have just learned.  Participants are limited to 6 and only one person from a library.  Workshop Presenter - Robert Levers of Levers Advertising and Design.

Location: SAILS Meeting Room

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Thursday November 5, 2015

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10:00 AM - 12:00 PM

Technology Infrastructure in the Library
Click to Register

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

A presentation by FTG Technologies that will discuss various types of technology planning in the library.  Topics will include:

Security cameras and building security

Wired vs Wireless

Basic infrastructure - cabling, cable management, data closet

Location: SAILS Meeting Room

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Tuesday November 17, 2015

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10:00
AM
-
12:00
PM

Website Communications Skills
[Click to be added to the waiting list](#)

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

This workshop will focus on ways to improve communication on websites.  Topics include overall strategies, how to write for the web, what to think about when using images and how to take advantage of the technology that is par tof any website's content management system.  The workshop will include time to to critique each attendee's homepage with participants contributing suggestions based on what they have just learned.  Participants are limited to 6 and only one person from a library.  Workshop Presenter - Robert Levers of Levers Advertising and Design.

Location: SAILS Meeting Room

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Wednesday November 18, 2015

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10:00
AM
-
12:00
PM

Board Meeting

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

Location: SAILS Meeting Room

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## Tuesday December 1, 2015

10:00 AM - 12:00 PM

**Website Communications Skills**
[Click to Register](#)

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

This workshop will focus on ways to improve communication on websites.  Topics include overall strategies, how to write for the web, what to think about when using images and how to take advantage of the technology that is par tof any website's content management system.  The workshop will include time to to critique each attendee's homepage with participants contributing suggestions based on what they have just learned.  Participants are limited to 6 and only one person from a library.  Workshop Presenter - Robert Levers of Levers Advertising and Design.

Location: SAILS Meeting Room

## Wednesday December 9, 2015

10:00 AM - 12:00 PM

**Searching for Circulation**
[Click to Register](#)

Contact: Laurie Lessner   508-946-8600 x214   llessner@sailsinc.org

Do you ever need to search for a title when placing a hold for a patron? Do you find what you're looking for right after they leave? Make it happen less frequently by learning to search for performing circulation tasks in WorkFlows. This is a hands-on workshop. Please bring examples of problem searches to the class.

- Find specific formats: videos, audio books, downloadables, etc.

- Setting up a search strategy

- Keyword, Browse or Exact?

- Learn to search for a specific author, title in a series, even song!

- Overview of Specialized Searches

- What is shadowed & when

Location: SAILS Meeting Room

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Thursday December 10, 2015

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1:00
PM  -  Searching for Circulation
3:00  [Click to Register](#)
PM

Contact: Laurie Lessner   508-946-8600 x214   [llessner@sailsinc.org](mailto:llessner@sailsinc.org)

Do you ever need to search for a title when placing a hold for a patron? Do you find what you're looking for right after they leave? Make it happen less frequently by learning to search for performing circulation tasks in WorkFlows. This is a hands-on workshop. Please bring examples of problem searches to the class.

- Find specific formats: videos, audio books, downloadables, etc.

- Setting up a search strategy

- Keyword, Browse or Exact?

- Learn to search for a specific author, title in a series, even song!

- Overview of Specialized Searches

- What is shadowed & when

Location: SAILS Meeting Room

Tuesday December 15, 2015

10:00
AM
-
12:00
PM
Website Communications Skills
Click to register

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

This workshop will focus on ways to improve communication on websites.  Topics include overall strategies, how to write for the web, what to think about when using images and how to take advantage of the technology that is par tof any website's content management system.  The workshop will include time to to critique each attendee's homepage with participants contributing suggestions based on what they have just learned.  Participants are limited to 6 and only one person from a library.  Workshop Presenter - Robert Levers of Levers Advertising and Design.

Location: SAILS Meeting Room

Wednesday December 16, 2015

Barcode Order

Contact: Deborah Conrad   508-946-8600 x211   dconrad@sailsinc.org

Last day to submit barcode order

# Network Stats

**September 2015**

Circulation:
Total Items Circulated: 310,902 (-21,144 from Aug.)
Gutenberg: 52
OverDrive Circ: 17,146 (-1,646 from Aug.)
Tumblebooks Circ: 7,626 (+6264 from Aug. w/ schools open)
All Formats Circ: 335,726 (-23,528 from Aug.)

Resource Sharing:
CommCat Items Borrowed: 984 (+49 from Aug.)
CommCat Items Loaned: 237 (+65 from Aug.)
Total Intranetwork Loans: 64,769 (-3,780 from Aug.)
Patron placed holds: 51,322 (-2,192 from Aug.)
Overdrive holds: 7,719 (Avg. wait for a hold is 22 days)

Holdings:
Cataloging Requests: 5,520
MARC Records Added: 4,821
Overdrive Holdings: 13,756
Patrons Added: 4,506
Total MARC: 1,125,235
Total Holdings: 3,672,296
Total Patron: 464,702