

SAILS Circulation User Meeting  
June 7, 2016  
Lakeville Public Library  
4 Precinct Street Lakeville MA 02347

Commonwealth Catalog issues

What to do if a patron can't place a hold because the ComCat says it is locally available but it really isn't.

Email Support SAILS will check out any existing copy to allow hold to go through ComCat.

How to handle damaged items belonging to a library outside the network

Call owning library and ask them how they want item handled

How bills for lost ComCat items are handled if the patron pays with a credit card

Ask patron to pay with a credit card and then SAILS will take care of reimbursing the owning library. Otherwise have patron pay you and then call owning library to find out how they want payment issued.

Renewals in ComCat

There are no renewals allowed on ComCat items.

ComCat has now added Routing Location, on printed bookstraps

Damaged Items

Who bills a patron – how should it be done

If an item is returned damaged the owning library should be contacted to determine how to handle the item.

If an owning library received an item returned in transit and there is damage that they want to charge for, they may bill the previous user. They must put a note on the patron's record so the patron's home library know what the charge is for.

Committee studying network policies re: damaged items (particularly those that can still circulate)

A committee has been set up to come up with a clearer definition of damage and procedures for circulating items with minimal damage. Possible sticky notes are being proposed for circulating library to put inside front cover to note damage.

Updating hold pickup location in Enterprise

Preferred pick up location must be changed by patron in Enterprise. A change in workflows will not work.

Placing holds in Enterprise for specific volumes vs. Workflows

When placing hold for a patron for a dvd set that is circulated both as a full set and as volumes: place the hold in Enterprise rather than workflows. This is much less limiting and more accurate.

How long do paid bills stay on a patron record

Old policy had paid bills staying on a patron's record for 36 months. Directors have recently approved changing the time period to 12 month.

Email checkout receipts

Workflows is capable of sending email checkout receipts. If you want to start using this feature email Support and they will set up a webinar for your training.

How to remove a patron record with charge history

You may remove patron records with expired cards that have charge history. In Circulation go to Users, right click on remove user and choose properties, check the box before "prompt before removing charge history". This will allow you to remove the charge history and then delete the user.

Transit slips for schools – a reminder

East Bridgewater has 2 schools East Bridgewater High and East Bridgewater Central, please use correct slips. For all schools be sure to use correct slips, maybe keep a list of correct transit names by circ. desk. Pre-print slips for problem locations.

Item Group Editor – how it can make your life easier

This can be used to change locations on large groups of items (up to 400) at one time. Please contact [support@sailsinc.org](mailto:support@sailsinc.org) for directions and a copy of the handout.

Training – what do you want in 2017?

Some possibilities are Advanced Reports and Searching in Workflows and Enterprise.

Open discussion

- During the next release, in early September, patrons should be able to sort their history.
- Workflows 3.6 (release possible by middle of next year) will allow records to be merged.
- To let SAILS know when a patron who uses Overdrive gets a new card go to <http://www.sailsinc.org/networkresources/> and on the right hand side of the page is Overdrive card replacement. Click on this link and fill out the form and send it. SAILS will transfer patrons Overdrive record to the new card.
- School deliveries in the summer will come directly to SAILS, no need for circulation to do anything differently.
- Dighton/Rehoboth school district should be joining the network soon
- BCC has a new branch BCC-Taunton
- Reminder that item checkouts always follow the checkout library's rules.

- SAILS is in the process of programming smart scanners which will allow circulation to populate a patron's record by scanning the back of the patron's driver's license.
- Enterprise has additions of Sitecues, which allows patrons to adjust font and enable speech on the site, and Novelist, which enhances reader advisory. Ebsco will be out in the fall for training on Novelist.

Circulation Roundtables – 2 dates in the fall

SAILS is looking for 2 host libraries and possible topics.

Circulation Meeting – 1 date in May or June

This meeting will be held in Lakeville and the date will follow.

## FAQ

### Handling ComCat Damaged Items

A patron brought back a ComCat book that is damaged. I called the owning library and they didn't know how to handle the billing process. I don't know how either. Can you help us?

You bill your patron whatever the owning library wants to charge for the item. Use Damage as the bill reason. Then your patron should make out payment to the patron's library. The patron's library then sends a check and the item back to the owning library. Pay the bill in Workflows.

One more thing. This individual usually pays for things online. How will that work with a comcat item?

You do the billing. The item is owned by URSA. The patron pays online. The patron's record gets cleared. Let us know the real owning library and we will send them a check once the credit card transaction goes through,

### Paying for Lost ComCat Items

The library that the patron is from is responsible for sending a check to the owning library even if that patron hasn't paid for the item.

If the patron pays for the lost item s/he makes out the check to check to the patron library. Then the patron's library issues a check to the owning library. This is the policy to avoid another library trying to deal with a check that has insufficient funds. It is always the patron's library that is responsible for dealing directly with the patron.

If the patron pays for the lost item with a credit card then SAILS will issue payment to the owning library.

## Procedures for Billing for Damaged Items **2016**

The owning library may determine that an item that had borrowed by a patron from another library is too damaged for further use. At the May 2016 Membership meeting, the SAILS Members voted to allow the owning library to bill a patron from another library for a damaged item. It is the responsibility of the owning library to make a note in the patron record that states what the damage is, the date the patron was billed, and the name of the library.

If the item is damaged sufficiently to invoice the patron but is still usable the owning library must put a circulation note in the item record indicating how it is damaged so that other patrons will be not be held responsible for damage that has been done by someone else.

The patron's home library should have the patron issue a check to the owning library following the same procedures in place for accepting payment for lost items belonging to another library. If a patron pays using a credit card SAILS will reimburse the owning library.

Re: Commonwealth | Circulation Meeting | Untitled document | My Account | Salesforce - Enterprise

https://sails.ent.sirsi.net/client/en\_US/lib/search/account? | Log Out | My Account | My Lists | Send a Request | Forgot Your PIN? | Select Language |

# SAILS LIBRARY NETWORK e-catalog

connecting you to your library

Everything | All Fields | Search | Advanced Search

Personal Information | Checkouts | Holds | Fines

Comrad, Deborah K.

Preferences

Default Language: English

Default My Account Tab: Holds

Preferred List: no default list

Preferred Pickup Library: New Bedford Free Public L

Show my checkout history

Record my checkout history

[Update](#)

SMS Notifications

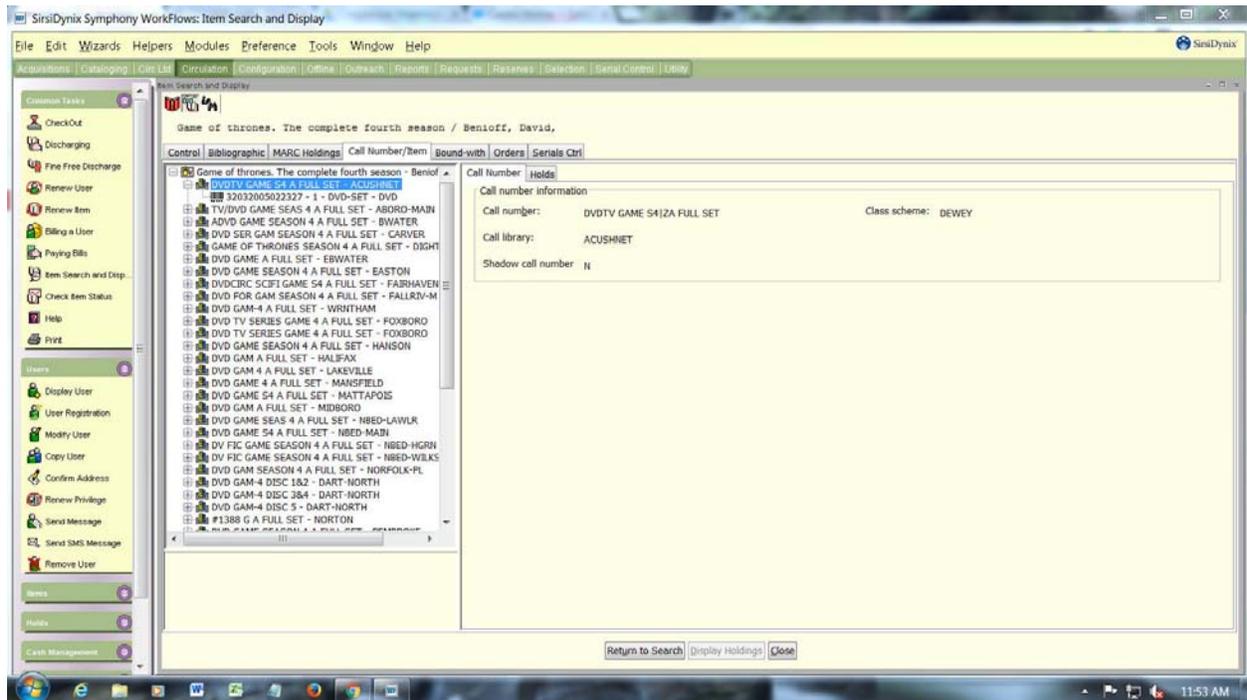
Your status: OK

<b>Checkouts</b>	
Total:	8
<b>Holds</b>	
Total:	11
<b>Fines</b>	
Total due:	80.00

3:22 PM

## Placing Holds on Multi-Volume Sets in Enterprise

This is the list of copies of the Game of Thrones in Workflows. If you place a copy specific hold for your patron on one of these copies NONE of the other copies will ever be flagged to fill that hold - even if a set becomes available. An option is to place a call number hold which time consuming in Workflows but never place a copy specific hold.



It is far easier to log in as your patron in Enterprise and place a hold. If you place a hold on A FULL SET for this title, any library's set that uses that call number can be flagged to fill the hold. Keep in mind your own copy will always go to your own patron first UNLESS they placed a hold on an item with an incorrect call number. If you notice that your copy is on the shelf but you have patrons on hold for that title contact [support@sailsinc.org](mailto:support@sailsinc.org)

Game of thrones [electronic resource]  
by Telltale Games (Firm)

Place Hold(s) ✕

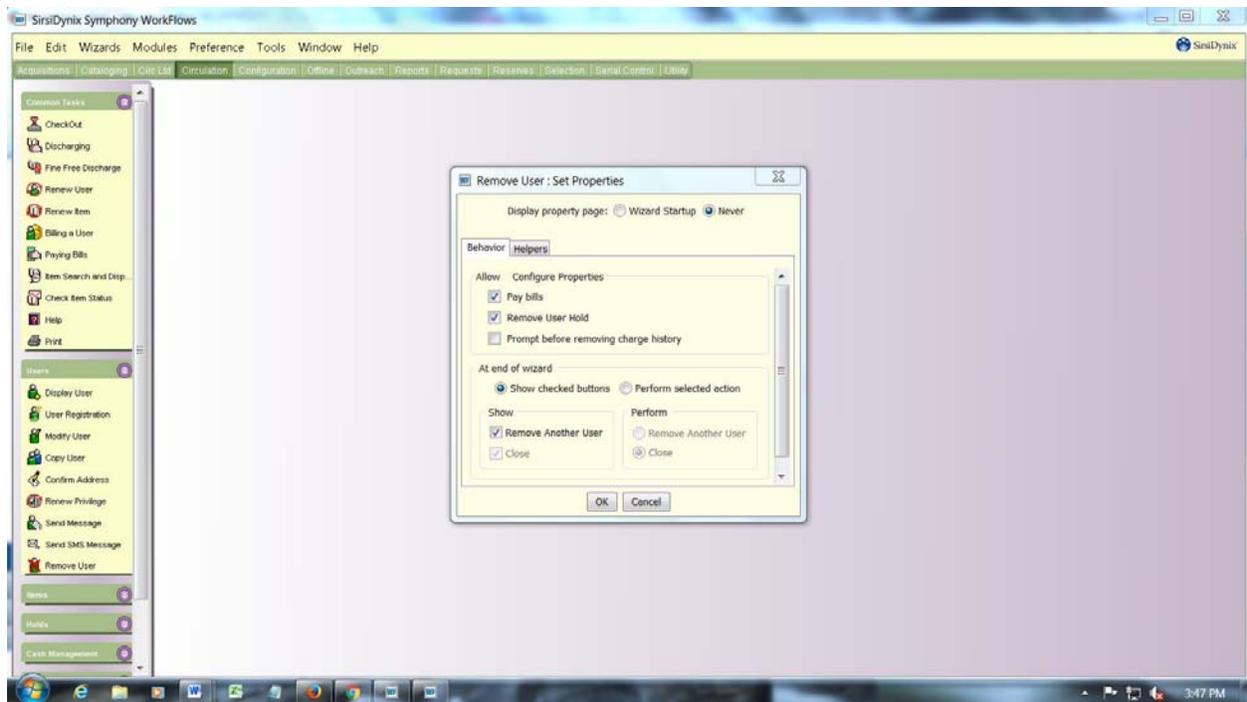
**Game of thrones. The complete fourth season**

**Pickup Library:**  
-- Please Select -- ▾

**Volume:**  
A FULL SET ▾

**Place Hold(s)**

by Boniuff, David, creator, computer television producer, television director



Change your properties to allow you to remove a patron's charge history when removing the patron.

Right click on Remove User - click on Properties

Check the box next to Prompt before removing charge history

Save properties

This eliminates the need to contact SAILS if you having trying to remove a user that has charge history.

## Updating Patron's Barcode on File with Overdrive

This can be done by a patron or staff person. You can link to the form by going to the SAILS website ([www.sailsinc.org](http://www.sailsinc.org)) and clicking on My Account



If the patron clicks on Move Overdrive Transactions this screen opens up

Select Account - Replaced Card from the Issue Category.

Enter the information including the old barcode and the new barcode and press submit

Please use this form for reporting questions and problems regarding our downloadable book service  
Overdrive has [online help](#) to guide you through finding answers to common problems.

**\*\*Note - these requests are usually handled during normal business hours (M-F, 8-4).**  
[Forgot your PIN? Get it here.](#)

**Your Name \***

**Email Address \***

**Please select your library**

**Issue Category**

**Old Card (barcode #)**

**New Card (barcode #)**

You can bookmark this url as well <http://www.sailsinc.org/overdrive-help-form/>

This form is also available in Overdrive - by going to help - support.