

# SAILS Network News

November, 2019



## **SAILS Sets Strategic Direction for Next Five Years**

SAILS Membership approved a new five-year strategic plan during the October 30 Special Members Meeting conference call.

The result of a June strategic planning session and follow-up surveys of the SAILS membership, the plan sets a path for the direction SAILS should be taking over the next five years. The plan highlights seven goals that will support the network's role as leader to member libraries while always being cognizant of and responsive to the needs of directors, staff, and library patrons.

### **Goal 1: Technology**

SAILS will serve as a leader in technology for its member libraries. The objectives under this goal focus on SAILS' role to help libraries keep up with technology trends; to support and improve technology services, such as the Integrated Library System and the public catalog; and to help libraries support and maintain their public computers. It also includes an objective to have further discussions around SAILS' role to assist libraries with their Internet bandwidth needs.

### **Goal 2: User Experience**

SAILS will provide an intuitive experience to end users for SAILS-supported products. Under this goal, SAILS commits to providing an intuitive experience to library users no matter what computers or devices they are using to access SAILS electronic resources.

### **Goal 3: Member Services**

SAILS will provide support and training to staff, making it easier for staff to better serve their patrons. SAILS should support sufficient network staffing to provide adequate training to library staff; improve the staff web site to make it easier to find help; and continue to be responsive to library support requests. This goal also includes an objective to discuss more consistent circulation policies and procedures to be implemented across all SAILS libraries.

### **Goal 4: Collaboration**

SAILS will support collaboration and resource-sharing among member libraries. SAILS will support cost savings for libraries through group purchase of supplies and subscriptions; will facilitate meet-ups among directors and staff; and will provide ways for libraries to share information with each other about what resources, programs, and equipments they provide.

### **Goal 5: Staffing**

SAILS will support staff to best meet the needs of member libraries and their users. Working with the Personnel Committee, SAILS will support methods to ensure the longevity of SAILS staff while also ensuring that the network is properly staff to support member services.

### **Goal 6: Cost efficiency**

Recognizing the financial constraints of its member libraries, SAILS will keep fees affordable for members. SAILS will continue to maintain a reasonable, two percent cap on membership fees. To help keep fees down, SAILS will develop a financial plan and will continue to seek opportunities to grow membership.

### **Goal 7: Member participation**

SAILS is a member-driven organization that will incorporate member involvement into the process of determining what services are offered, how funds are spent, and future directions for the network. SAILS will work to get more member involvement at Membership meetings and on SAILS committees and task forces. The network will also provide multiple opportunities for member feedback as part of its decision making process.

The full strategic plan is available at the SAILS web site at <https://www.sailsinc.org/wp-content/uploads/2019/10/SAILS-FY21-25-Strategic-Plan.pdf>.

Many thanks to the following SAILS members who participated on the FY19 and FY20 Planning Committees:

- Jocelyn Tavares, Dighton Public Library (chair)
- Jayme Viveiros, Lakeville Public Library
- Susan Pizzolato, Mattapoisett Free Public Library (FY19)
- Dina Brasseur, Acushnet Public Library (FY20)
- Kate Hibbert, Seekonk Public Library (FY20)

## FAQ on Overdrive Licensing Restrictions

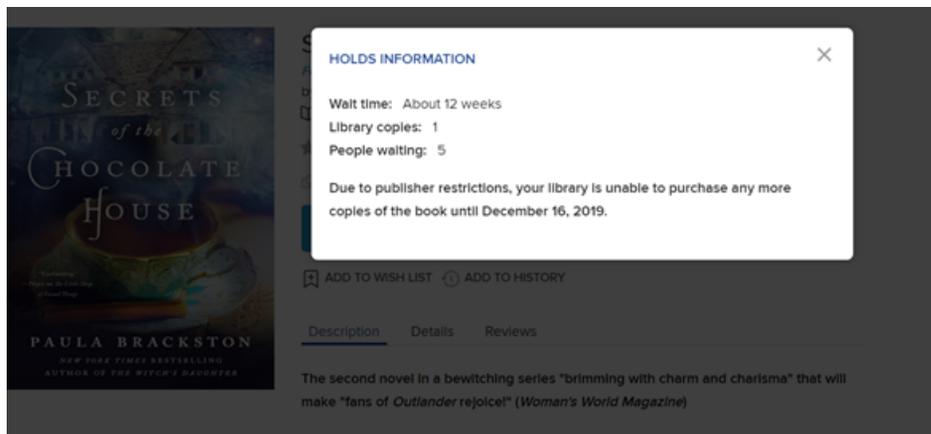
The SAILS FAQ on Overdrive licensing restrictions has been updated to reflect recent embargoes established for Macmillan and Blackstone Audio titles.

The intent of the FAQ is to let the public know how licensing restrictions can lead to long waits for electronic content. The SAILS web site links to the FAQ from the "Find Books & More" menu on the home page. A link to the FAQ has been added to a dismissible banner on the SAILS Overdrive site.

Any library can link to the FAQ at <https://www.sailsinc.org/catalog/overdrive-faq/>.

The new restrictions from Macmillan went into effect on November 1. For the first eight weeks a Macmillan title is released, libraries will only be able to buy one "One Copy/One User" copy of the title. Advantage libraries that purchase this copy will not be able to share these eBooks with other libraries in the SAILS networks as they do with all of the other eBooks in their collections. After eight weeks, the title will be available under a 24-month Metered Access model. For the first year, the price of the eBook will be \$60. The price will decrease to \$40 after the first year.

In addition to the SAILS message that has been added to the dismissible banner, Overdrive has added some messaging to any Macmillan titles that are less than eight weeks old and have a wait. Next to the wait time, a help icon appears that, when clicked, provides the following pop-up message to users: "Due to publisher's restrictions, your library is unable to purchase any more copies of the book until ..." This message has been added by Overdrive for all libraries.



The screenshot displays a book cover for "Secrets of the Chocolate House" by Paula Brackston. A white pop-up window titled "HOLDS INFORMATION" is overlaid on the right side of the cover. The pop-up contains the following text:

Wait time: About 12 weeks  
Library copies: 1  
People waiting: 5

Due to publisher restrictions, your library is unable to purchase any more copies of the book until December 16, 2019.

Below the pop-up, there are buttons for "ADD TO WISH LIST" and "ADD TO HISTORY". At the bottom of the page, there are tabs for "Description", "Details", and "Reviews". A short review snippet is visible at the bottom: "The second novel in a bewitching series 'brimming with charm and charisma' that will make 'fans of Outlander rejoice!' (Woman's World Magazine)".

## Technical Services Tip - SAILS Fiction Policy Reminder

Back in May 2013, SAILS Cataloging began implementing a policy for attaching copies to fiction records. The main purpose of this policy is to improve the efficiency of filling holds for popular fiction titles, but it also has the added benefit of saving you time when adding copies to Workflows. Instead of creating a request record because your copy has a different date and publisher, you may be able to attach your copy to an existing fiction record.

**The SAILS fiction policy states that the title and author (and illustrator, when necessary) must match to attach, but that the edition, publication information, and physical description do not need to match to attach.**

### Adult Fiction titles

All hardcovers should be attached to one record and all paperbacks should be attached to another record. Keep in mind that large print copies should be attached to large print records (large print hardcovers on one record and large print paperbacks on another record). Authors' preferred text editions should be attached to separate records.

### Juvenile/YA Fiction titles

All hardcovers and paperbacks should be attached to a single record. Large print copies, board books, and adaptations or abridged versions should be attached to separate records.

### Graphic Novels titles (Adult, YA, or Juvenile)

All hardcovers and paperbacks should be attached to a single record.

**This policy only applies to fiction titles.** Please keep in mind that SAILS Cataloging can't go back and merge all of the older fiction records in the system. SAILS Cataloging's cleanup efforts are focused on current adult, YA, and juvenile fiction titles as well as titles on summer reading lists.

Don't forget to search by more than just a book's ISBN when looking for a matching record. You might not find a record by the ISBN, but you could find a match by doing an advanced search (combining the title and author) using the Advanced Search Helper 🧙 that is available in the search window for most of the wizards in the cataloging toolbar.

Fill out an error reporting form on the SAILS website if you need your copy's ISBN added to a record. You can also fill out an error reporting form if you have any questions about attaching to a record or send an email to [catsupport@sailsinc.org](mailto:catsupport@sailsinc.org) and SAILS Cataloging will help you.

---

## SAILS Receives Grant from Island Foundation

SAILS has received a \$1,000 grant from the Island Foundation, a private grantmaking foundation based in Marion. The discretionary grant can be used for general support of the organization.

SAILS plans to identify a project over the next month for which these funds can be used.

---

## Circulation Roundtables

Sign up for the upcoming SAILS circulation roundtables to get an opportunity to talk and share ideas with circ staff at other SAILS libraries.

SAILS staff is invited to bring questions and discussion topics to the fall circulation roundtables. The roundtables will include discussion on updates on the current evaluation of the SAILS Integrated Library System (Workflows) and Enterprise catalog; news of upcoming features coming to Overdrive; information and discussion on an upcoming Workflows feature allowing users to place multiple holds on a title; and a look at recent Enterprise improvements.

- 2 p.m. Wednesday, November 20 at the Norton Public Library - [Sign up here](#)
- 10 a.m. Tuesday, December 3 at the Acushnet Public Library - [Sign up here](#)

---

## Save the Dates for Upcoming ILS Demos

SAILS is scheduling demos of potential Integrated Library Systems during the second week of December.

The SAILS ILS Evaluation Task Force has received three responses to a Request for Information issued in September to get details from vendors about functionality available in their systems and estimated five-year pricing. The Task Force is conducting this evaluation because SAILS' current contract with SirsiDynix ends in October 2020.

The demos will be scheduled on December 9, 10, and 12. We plan to schedule two demos from each vendor, one in the morning and one in the afternoon, to provide more flexibility for library staff to attend. More details about which vendors will present on each day, along with sign-up information, will be shared via the allsails mailing list by next week.

---

## Do you know LEA?

With LEA (Library eBooks and Audiobooks,) patrons of your libraries have access to thousands of eBooks and audiobooks from across the Commonwealth. Powered by Overdrive, LEA makes it possible for you to borrow eContent from all Networks in Massachusetts regardless of your home library.

With LEA, you can access eBooks, audiobooks, and more from libraries across the Commonwealth using your phone, tablet, or eReader. There are 345 partnering libraries with an estimated collection of over 350,000 eBooks and audiobooks.

Have you ordered promotional materials from the MBLC? If not, get in touch with Celeste Bruno (BLC) [celeste.bruno@state.ma.us](mailto:celeste.bruno@state.ma.us) and she'll tell you how. If you have any feedback at all, please email [support@sailsinc.org](mailto:support@sailsinc.org), or Celeste, to let us know.

---

## Answers to Questions From Survey

- Problems with Enterprise searching.
  - Though this isn't the best search engine, and that is supposed to be improving, you can do an initial search and use the 2 drop-down boxes to help target your search. The 1st drop-down options limit to Audiobooks, Large Print, Music, Print Books, Videos, and grade levels. The 2nd drop-down limits to the index; title, subject, author, isbn, series, keyword in author heading, and keyword in title heading. These heading searches produce an alphabetical list with the number of titles in the system.
  - You can also do an initial search and then limit by facets. This is similar to Amazon and other shopping sites. Language and series are a couple of the facets available.
  - The way the relevancy works is by calculating the frequency of the search terms that occur in the bib records. Title is first by default, and if a title has fewer words, the match is more likely because it turns out a higher percentage.
  - [https://sails.ent.sirsi.net/help/user-help\\_en\\_US/index.htm](https://sails.ent.sirsi.net/help/user-help_en_US/index.htm) - check out the Enterprise help, which provides additional tips.

- Patrons should have photo ids on their cards. I think this would improve the security on the accounts.
  - This is a library decision. The ability to include patron photos is available. Please have your director contact us if this is something you'd like to start implementing.
- Looking up patrons is a bit slow with the two step process that includes going to the search icon (with a magnifying glass). It would be better if the patron name could be entered directly and searched directly on the checkout page instead of having the page require searching for a name to find out the user ID.
  - If you right-click on the wizard and go into properties, on the helper tab you'll see near the bottom that you can start with the patron search by default. Keep in mind that the network highly encourages checking out items to patrons by looking up their library card.
- Printing a list of checkouts isn't easily customizable-would like to be able to select certain fields to show (e.g. only title, author, due date, etc)-now just prints out extra unwanted fields
  - Is this for the receipt or for going back and printing from the patron's record?
- One thing for the "Accommodates expiration dates for patron's library privileges" is the glitch in which some of our patron types (OURREG) will sometimes now (do you mean "not"?) allow check out after the patron record has been updated.
  - if you are updating a patron's record that was created using the Online User Registration form the expiration date must be updated. The recommended method for doing this is using the Renew Privilege wizard after the record has been updated. If the record isn't completely updated you may receive a message that the patron has reached the limit of charges allowed.
- The layout of add brief title is very confusing, more important/required tabs should be at the top like the "Item ID".
  - The item ID field is the field that the cursor is at, when first opening the wizard, if you do not have "auto-generate item ID when adding item checked."
- The one area that is difficult is working with REPDAMAGE billed items. Because the billed item does not follow the same route as a LOST billed item, it must be discharged and then discarded, losing the barcode and essentially the record of the items and must be handled differently than LOST billed items.
  - You can create a damaged "patron" with the profile of mending, and check the items out to that patron. Yes, it will come off the patron's record as a charge, but the bill will still be on their record and the item still in the system with a shadowed location.
- I don't know why we can't see where the patron is on the holds queue from within their user holds, the way they can using Enterprise.
  - If you are on the patron's holds tab in their record, click on the item ID for the hold and you should see the position there. As with the position in Enterprise, the queue is dependent on if the patron's library owns the item or not.
- There are just too many widgets or tools or whatever they are called.
  - If you're logged in with your library's circulation account, you can click on a "Circ LTD" toolbar. It is very basic.
- Big problem: does not display patron AT ALL if name is misspelled, even if it is only by 1 letter! This is a frequent issue for our student workers!
  - Depending on the commonality of the name, you can always search by using the browse option in the patron search. Put in the first few letters of their last name and you'll get an alphabetical list that you can scroll through.
- Find offline circ confusing-often easier to use Word and have a staff member enter in manually when system comes back online

- Please contact SAILS to set up training for this and/or look at the offline manual at: <https://www.sailsinc.org/Manuals/Standalone.pdf>
- patron notes not very effective since staff often don't notice them-would be helpful to have them popup at checkout maybe or show as a different color banner somewhere.
  - in the properties, you can turn on a sound alert, though you need to have speakers on the workstation. If old notes are removed, the ones remaining will be relevant and may be worthy enough to get into the habit of looking at.
- method of inventory through Workflows doesn't seem comprehensive enough-it should provide library with a list of items that weren't scanned but should have been and items that were scanned but shouldn't have been
  - Marking the items as inventoried in workflows is only step one of the process. SAILS needs to run reports that show the items that were not inventoried. Please contact SAILS to discuss.
- would like the option to turn off overdue popups when discharging items
  - There are multiple options in the checkout wizard that controls what pops up. You definitely want to see hold and transit instructions though.

## Holiday Hours

SAILS will be closed the following dates for the remainder of the year.

Monday November 11th  
Wednesday November 27th at 12:00  
Thursday November 28th  
Tuesday December 24th at 12:00  
Wednesday December 25th

## Network Stats

### Circulation (no Overdrive):

Total Items Circulated: 359,241  
Items Loaned between SAILS Libraries: 73,047

### OverDrive Circulation to SAILS patrons:

Ebook: 26,402  
Audio Book: 16,286  
Video: 64  
Magazines: 928

### Database Size:

Titles: 1,224,135  
Items: 4,831,255  
Total Patrons: 435,677



**SAILS**

10 Riverside Dr.  
Lakeville, Massachusetts 02347  
508-946-8600

[www.sailsinc.org](http://www.sailsinc.org)