



Network News

March 2022



SAILS Welcomes New Raynham Library Director Karen O'Brien

Karen O'Brien has been appointed the Director of the Raynham Public Library. Her many years of library service include working in various libraries in both OCLN & MLN. She brings experience as an Assistant Director, Supervisor of Technology, Youth Services Librarian, and Information Specialist.

Prior to becoming a librarian, her previous career was in book publishing. She has a BS in Visual Design and earned her Masters of Library Science and Information Technology from University of Arizona. In her spare time Karen enjoys exploring antique stores and flea markets, spending time with her kids, and hiking with her Carolina dog, Odin.

Please join us in welcoming Karen to SAILS!

Best Wishes and Congratulations!



SAILS offers best wishes and congratulations to:

- Ames Free Library Executive Director Uma Hiremath, who is retiring at the end of March. Uma started at the Ames Library as its Assistant Director in 2008 and became its Executive Director two years later. She has served on the SAILS Board of Directors and has been an active member of the Legislative Breakfast Committee.
- Norfolk Public Library Libby O'Neill, who will be starting as the new director of the Boyden Library in Foxborough at the end of March. Libby has been working in SAILS libraries since 2013, when she became director of the Elizabeth Taber Library in Marion. She is a current member of the SAILS Board of Directors, Personnel Committee and Nominating Committee.



SAVE THE DATE



MASSACHUSETTS
LIBRARIES:

Getting it Done

PLEASE JOIN US FOR THE
2022 SOUTHEASTERN
MASSACHUSETTS LIBRARIES
VIRTUAL LEGISLATIVE BREAKFAST



FRIDAY, MARCH 25, 2022

10:00 AM - 11:00 AM

A VIRTUAL EVENT

RSVP: LEGBREAKFAST@SAILSINC.ORG

<https://us02web.zoom.us/j/7172865379?pwd=d2lwTzdjZkk3cDhrZ2l6OXVGNkxhdz09>

Privacy Matters: Safeguarding Patron's Circulation and Holds History

A patron's right to privacy is paramount to their use of the library. Without the expectation that their intellectual pursuits will remain private, patrons are less likely to check out sensitive materials.

For this reason, the Commonwealth of Massachusetts specifically excludes the records with a patron's identity and intellectual pursuits from the state's public records law. SAILS has also had a long history of taking measures to protect patron identity and their activity in the system. Below are some items related to circulation and holds history that SAILS has been reviewing this year with input from the Privacy Audit Task Force.

Retention period for patron data

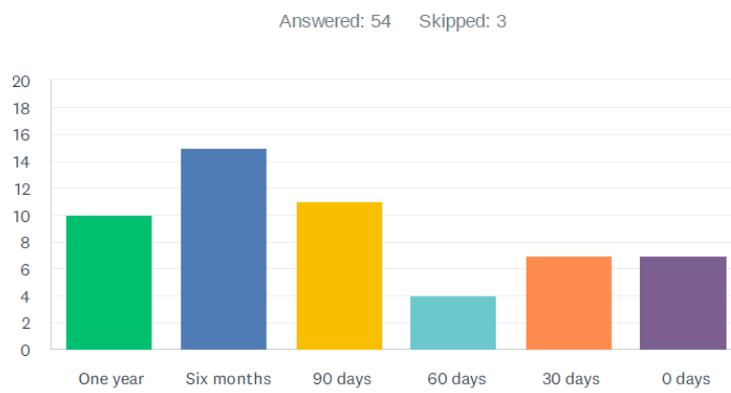
Libraries should only keep circulation and holds data as long as is necessary to support library operations. To support operations, staff often need to look up current checkouts and holds for patrons. They also need transaction information related to any outstanding bills on a patron record. In addition, the network keeps this information for up to a year in case the history is required to track down which patron may have damaged materials.

Once libraries no longer need that transaction information, there is no reason to keep it in the system where it could be retrieved in a potential data breach or otherwise accessed for reasons unrelated to library operations.

As part of the audit, the SAILS Privacy Audit Task Force has asked directors and circ contacts how long this information should be retained to support billing for damaged items. The results show there is willingness to reduce the retention period for this data.

Public library survey question on damaged items

Q5 How long should the system keep the circulation history of an item to allow for proper billing when damage occurs?



K-12 / academic library survey question on damaged items

Q5 How long should the system keep the circulation history of an item to allow for proper billing when damage occurs?



Based on these results and the need to keep patron data private, the Task Force is asking that the SAILS Circulation Policy Committee reconsider the time we keep this transaction information in the system. The network is also considering the question of whether it should keep the records of long-expired patrons with just a small amount of bills on their accounts.

Patron Reading History

Although we need to protect patron privacy, libraries also need to accommodate patrons who choose to keep a history of materials they have checked out. We want patrons to actively make this choice rather than automatically tracking their reading history on their behalf. For this reason, the tracking of circulation history is only done for public library patrons if they opt into the service.

Since the fall of 2020, SAILS has started reminding patrons that they have checkout history on their account and informing them that they can turn off the service at any time. If a patron asks to have their previous checkout history permanently removed from their account, send a request to support@sailsinc.org. We can remove all of their checkout history or can just remove the history from a specific time period.

There is also the question of who can view a patron's circulation history. Workflows provides an option to view a patron's checkout history from their record, but this option can be turned off through the properties for the Display User wizard. The Charge History helper can also be turned off for the Checkout and Remove User wizards. At this time, the library director has the option to decide if staff can or cannot view a patron's charge history. Libraries that would like to remove the charge history from display can contact support@sailsinc.org for guidance on how to do so.

Please note that removing the charge history from display does **not** affect the feature that displays an alert if a patron is checking out an item they have previously checked out.

Placing ComCat Requests Through the Staff Login

The easiest way to place a request on behalf of a patron is to log in as a staff member and place it for them there. Here are a few advantages:

When Staff request on behalf of a patron:

- The request is automatically approved and sent out, even if the patron's account is set to require staff approval
- Staff can override the "Duplicate Request" message – submit more than one request for the same item
- Staff can override if the item is available in their local system

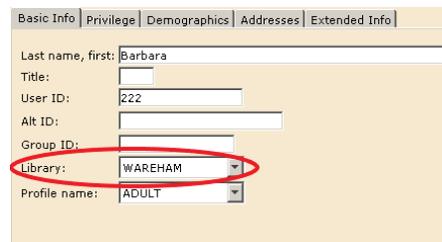
The other advantage, and this is important as we continue to move forward with our patron privacy policies, is you won't see the patron's PIN. Yes, this is important. Patrons are able to change their PIN through Enterprise. It's very possible they're using a PIN that they also use for other online transactions. You don't want to know what that is.

Please let us know if you have any questions!

Circulation Tip of the Month

By Chelsea Fernandes

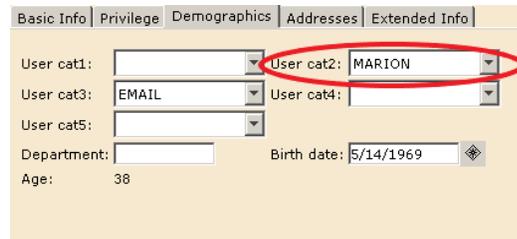
Patron Records - Issuing Library Vs. UserCat2



Basic Info	Privilege	Demographics	Addresses	Extended Info
Last name, first:	Barbara			
Title:				
User ID:	222			
Alt ID:				
Group ID:				
Library:	WAREHAM			
Profile name:	ADULT			

The library name in the Basic Info tab identifies what library has issued the card to the patron. This is also the setting that determines hold priority. The patron now "belongs" to this library. Click the Demographics Tab. User cat2 should be the name of the community where the patron resides. It should match the City in Address1. If the patron lives outside of SAILS but in

Massachusetts then the value is set to MASS. If the patron lives outside of MASS, then it is set to NOMASS.



Basic Info	Privilege	Demographics	Addresses	Extended Info
User cat1:		User cat2:	MARION	
User cat3:	EMAIL	User cat4:		
User cat5:				
Department:		Birth date:	5/14/1969	
Age:	38			

OverDrive/Libby MarketPlace Class- Thursday March 24, 2022

This class is geared toward the back-end side of OverDrive/Libby. We will be discussing lending models, purchasing, managing your library's holds in OverDrive and the new database and streaming content that is now available to purchase.

You can sign up here: [http://www.eventkeeper.com/code/ekform.cfm?curOrg=SAILS&curName=2022/03/24 OverDrive/Libby Marketplace Class](http://www.eventkeeper.com/code/ekform.cfm?curOrg=SAILS&curName=2022/03/24%20OverDrive/Libby%20Marketplace%20Class) .

Email cfernandes@sailsinc.org with any questions. Look forward to seeing you there!

Annual Technical Services Meeting on Zoom

Jennifer Michaud

This year's annual technical services meeting will be held on Wednesday, May 11th from 10am to noon on Zoom. This annual meeting is a chance for SAILS Cataloging to update technical services/cataloging staff about any network news or changes related specifically to cataloging. Topics are still being finalized at this time, but we'll email them to the Cataloging List prior to the meeting. If there's a topic that you would like us to discuss, please email catsupport@sailsinc.org with your suggestions. Please register on the SAILS website if you plan on attending this meeting.

[Click here to register](#)

Highlights of the March 2022 Board Meeting

- The Board renewed the SAILS Health Insurance Plan for FY22-23
- SAILS Executive Director Kathy Lussier reviewed survey results regarding a potential eCard registration service that would provide basic verification of the patron's address and check for duplicates in the SAILS database before creating an account. The service could also handle online renewals for expiring library cards. The survey showed broad support for the service and for the basic address verification option, which checks to ensure a person with the patron's last name lives at the address submitted on the form. Membership will vote on this service at its April meeting.
- Kathy also reviewed survey results regarding patron privacy. There were some concerns related to encrypting PINs, which would include removing PINs from the view of staff, but Kathy believes the network will be able to address many of the concerns cited in the survey.
- SAILS is kicking off the process to begin reviewing its office space needs.
- The Board voted to allow non-directors to chair the following committees, which previously had required a director as chair:
 - Circulation Policy
 - Pub Pac
 - Overdrive
 - Legislative Breakfast
 - Electronic Resources
- The Board discussed ways to reach out to new directors who have joined the network since COVID began. There has been a lot of turnover in directors since the pandemic began, and they haven't had the opportunity to meet others at in-person meetings. A meet-up is being planned for the first week in April.
- The network is planning to hold an in-person Library Showcase this spring.
- The MBLC will be offering a grant to networks to assist with bolstering Cybersecurity.

UPCOMING EVENTS:

Barcode Order Placed - March 9th

Quipu eCARD Demonstration - March 15th 11:00 am - 12:00 pm

SAILS Board Meeting - March 16th 10:00 am - 12:00 pm

OverDrive/Libby Marketplace Class - March 24th 10:00 am - 11:00 am

Quipu eCARD Demonstration - March 30th 2:00 pm - 3:00 pm

Google Apps Training - April 5th 10:00 am - 11:30 am

Google Apps Training - April 5th 2:00 pm - 3:30 pm

Google Apps Training - April 6th 10:00 am - 11:30 am

FEBRUARY STATISTICS

Circulation (no Overdrive)

Total Items Circulated: 237,855

Items Loaned between SAILS

Libraries: 54,619

OverDrive Circulation to SAILS patrons

Ebook: 32,634

Audio Book: 18,272

Video: 50

Magazines: 2,559

Database Size

Titles: 1,071,869

Items: 3,186,698

Total Patrons: 363,359



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