

SAILS Network News

September, 2017



Patron History Retention

Every now and then the SAILS office staff is asked why a paid bill or canceled hold isn't appearing in a patron record. The network has a formal record retention policy that defines what type of information is kept in a patron record and for how long. The policy was reviewed and updated by the Network Membership in February, 2017. The policies are:

1. The link between patron and item borrowed is maintained after the item is returned. SAILS will privatize completed public library transactions 12 months after the transaction has been completed.
2. Favorites are compiled automatically for newly registered patrons. SAILS will run a report once a week to purge records of authors /subjects patrons have checked out in the previous week and will modify newly created patron records so that all checkouts are not tracked as favorites. The only Favorites information that will be retained are those authors/subjects actively selected by patrons.
3. Paid bills are removed 12 months after the date of payment.
4. Cancelled, expired, and holds that were available but not picked up are deleted from patrons' records 3 months after the holds has become inactive.
5. Holds that are filled are purged 1 day after the checkout.
6. Patron records are purged 36 months after the privilege expiration period has passed. Patrons with outstanding overdues and bills are stored indefinitely.
7. Outstanding bills and overdue items are all retained indefinitely on a patron record.
8. Patrons may opt into saving their checkout history. This history is saved indefinitely or until
 1. The patron requests that the record be purged
 2. The patron record is being removed from the system

Libby - The New Overdrive App

Overdrive has developed and is promoting a new app called Libby. The target audience for Libby is the new user who doesn't want to deal with Adobe Id's and DRM issues. There is no end of life for the existing Overdrive app but all new features such as maintaining your reading history and obtaining a library card will only be available on Libby.

The Libby App is available in the Apple store, Google Play store, and Microsoft Store. It is not currently available through the Amazon store but it can be loaded on a Kindle Fire from another market, such as the Good e-Reader Android App Store although first you must set the device to allow the installation of apps from unknown sources. A better option is to download Libby on a different device and set your reading preference to Kindle. For directions on how to do this you can go to <https://help.libbyapp.com/kindle-books/making-kindle-your-preferred-way-to-read/>

Patron responses to Libby have been very positive – typical patrons can download the app and immediately find and download eBooks and audio books. This is a much easier process than it has been in the past and staff members should be able to answer questions from patrons more easily.

Overdrive has a number of resources to help library staff members become comfortable with Libby.

There is a 45 minute tutorial that takes you through all the options and steps of using Libby

<https://cc.readytalk.com/cc/playback/Playback.do?id=9gn5pu>

Overdrive also offers a Training Template that can be branded by the local library. This template includes training instructions, a checklist, and a PowerPoint presentation.

<http://resources.overdrive.com/library/staff-training/#>

Here is an instructional handout that libraries can distribute to patrons it can be downloaded and reproduced. If you would like to customize the handout please email support@sailsinc.org and we will send you this handout as a word document.

<https://www.sailsinc.org/wp-content/uploads/SAILSLibbyHandout.pdf>

If you use Overdrive and haven't yet tried Libby you really should. Titles you check out through the Overdrive website or old Overdrive app will appear in your Libby checkouts. If you have an Overdrive account in another network or a BPL ecard you can add those cards to Libby and move between the different catalogs. Libby also provides more suggested titles lists to enhance browsing.

As the fall progresses SAILS will be offering opportunities for library staff members to learn more about Libby.

Ask Us About Mobile Circ

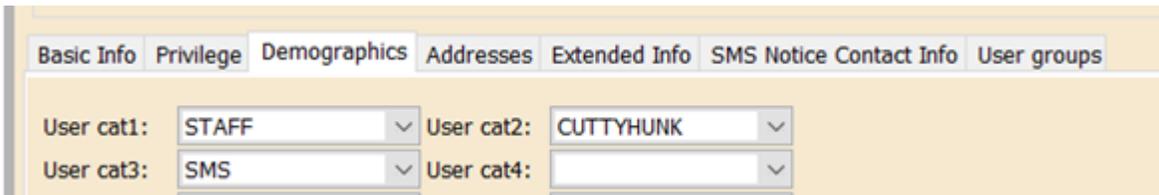
Does your library have a tablet for staff use that is under used? Contact support@sailsinc.org and schedule some onsite training on how you can use Mobile Circ for library operations. You don't need to just use it to check out items to patrons when you are not in the building. Mobile Circ can be used to help you pull items to fill holds and to weed your collection without having to wait for SAILS to run weeding reports. There is no charge for the license for the app. The only requirement is that you only load it on library owned equipment. Because there are no obligations you can use it on a test basis and if you don't like it let SAILS know and we will remove access to the app.

Failed to Send Text Messages

Every day SAILS staff check the report logs for the text message alerts sent to patrons and every day messages fail to be sent because the information in the patron records has not been completely entered. We fix the problems when we encounter them but over the past several months the number of failed messages has increased and there seems to be a pattern to the problem.

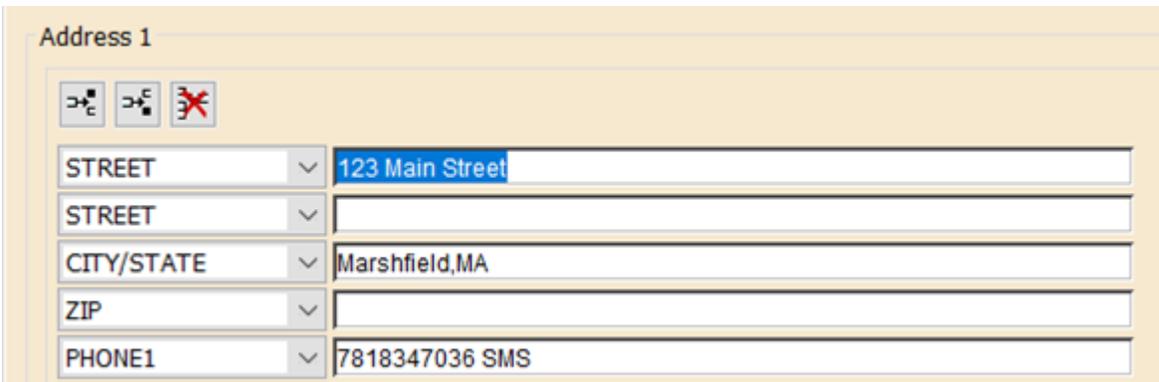
There are three components in a patron record that are entered to indicate that a patrons wants to receive text message notification.

UserCat3 – must be set to SMS. This is the first place the software looks to decide if a patron should receive SMS (text), Email, or automated VOICE notification.



The screenshot shows a tabbed interface with the following tabs: Basic Info, Privilege, Demographics, Addresses, Extended Info, SMS Notice Contact Info, and User groups. The 'User groups' tab is active, displaying four dropdown menus for 'User cat1', 'User cat2', 'User cat3', and 'User cat4'. The values are: User cat1: STAFF, User cat2: CUTTYHUNK, User cat3: SMS, and User cat4: (empty).

Address1 – Phone1. Add SMS after the telephone number that should be used for the text message. This doesn't really affect the notice delivery but we have been told that circulation staff members like to be able to easily identify how notices are being delivery. ***This doesn't actually do anything with the software.



The screenshot shows the 'Address 1' form with the following fields: STREET (123 Main Street), STREET (empty), CITY/STATE (Marshfield,MA), ZIP (empty), and PHONE1 (7818347036 SMS). There are also three icons at the top: a sheet of paper, a magnifying glass, and a red X.

SMS Tab – This information is critical. If it isn't completed then the notice is never sent. The tab will appear blank when opened the first time for a patron.

1. Click the button that looks like a sheet of paper to add a phone line to receive SMS notification.
2. Label – Enter the name of the person the phone belongs to.
3. Phone Number – Enter only the numbers
4. Overdue Notice – Place a check mark
5. Hold Notice – Place a check mark
6. Click Save when the record has been updated. *Note: Do not put checks in any other field besides Hold and Overdue. We won't be generating other notices via this method.

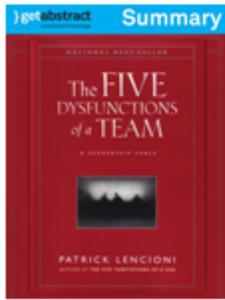
Basic Info Privilege Demographics Addresses Extended Info SMS Notice Contact Info User groups

Phone Numbers

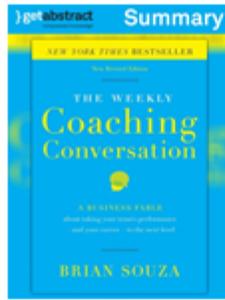
Label	Country	Phone Number	Overdue Notice	Hold Pickup Notice	Bill Notice	Manual Message	User Announcements
Debby's dog	United States	5089582207	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

getAbstract

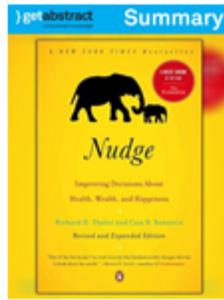
Earlier this year Overdrive announced a partnership with getAbstract, a catalog of 8,000+ simultaneous access business and self-improvement titles. These titles are condensed to the titles most important concepts and strategies and are designed to be able to be read in under ten minutes. To raise awareness for these incredible titles, getAbstract is offering two free weeks of access to 12 of their highest quality titles. The titles focus on leadership, professional growth, and finance / economics and can be accessed from September 25 – October 9 for free! The titles will be featured in a collection on our OverDrive website homepage for the two-week campaign. Similar to the Big Library Read program, these titles will be available for simultaneous use during this 2 week timeframe. Once the two period has expired the SAILS Overdrive Advisory Committee will evaluate usage to determine if this is a collection of interest to SAILS patrons.



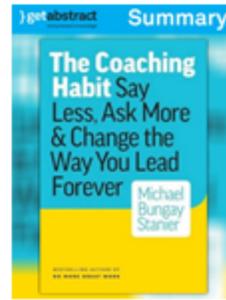
The Five Dysfunctions of a Team



The Weekly Coaching Conversation



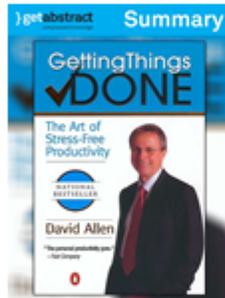
Nudge



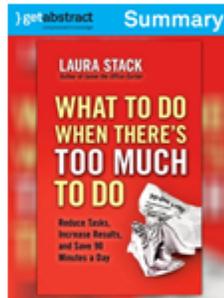
The Coaching Habit



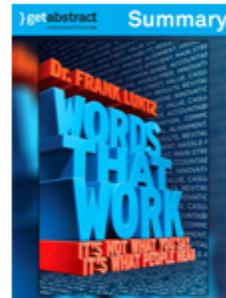
The One Thing



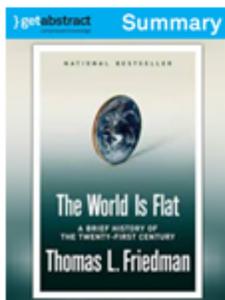
Getting Things Done



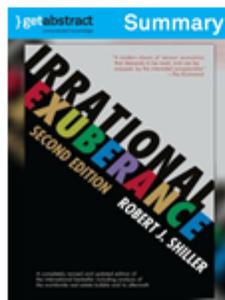
What to Do When There's Too Much to Do



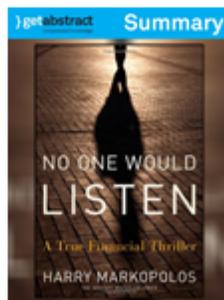
Words That Work



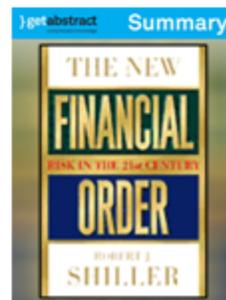
The World is Flat



Irrational Exuberance



No One Would Listen



The New Financial Order

CALL FOR PROPOSALS

The Massachusetts Library Association is accepting proposals for programs at the 2018 conference, *MLA 2018: Libraries: Our Common Wealth*, in Framingham, MA, May 21-23. Program topics may be anything library related from Adult Story Time to Z39.50. All ideas are welcome. We are looking for a variety of programs so that our conference has something for everyone regardless of staff level or library type. Programs may be single presenters or panel discussions. Panels should have no more than 3 participants.

Submit your proposal [HERE](#) by September 29, 2017

Submissions will be reviewed by the Conference Committee and selections will be made by mid-October.

Thank you and we hope to see you in Framingham in May!

Upcoming Events

**Tuesday
September
12, 2017**

**9:00
AM - 11:30AM Beginning Cataloging Training
AM**

Contact: Jennifer Michaud 508-946-8600 x215 catsupport@sailsinc.org

Overview Provides an overview of the basic date entry procedures new staff. This workshop will only cover print materials.

This workshop is for Adding records using the Workflows Java Client

Attaching Call Number and copies records

This is a hands on workshop

[Register Now](#)

Location: SAILS Meeting Room

**Wednesday
September
20, 2017**

Barcode Order

Contact: Lisa Hart 508-946-8600 X210 lhart@sailsinc.org

Last day to place Patron and Item Barcode orders.

**10:00
AM - 12:00PM Board Meeting
PM**

Contact: Deborah Conrad 5089468600 dconrad@sailsinc.org

Location: SAILS Meeting Room

**Tuesday
September
26, 2017**

**10:00
AM - 12:00PM How to Use Google Apps
PM**

Contact: Laurie Lessner 5089468600 llessner@sailsinc.org

Did you know if you have a SAILS gmail account you also have access to all the Google apps and a ton of storage space? Create from a full suite of products, similar to what you're used to using in Microsoft Office. Your files are kept online and updated automatically. Log into your Google account from anywhere and have access to all of your work. Share your files with co-workers to collaborate or just have allow others to view and/or comment.

At this workshop you'll have an overview on how to use the following products:

Google Drive - storage for all of your files

Google Docs - Text documents - Proposals, reports, shared meeting notes

Google Sheets - Spreadsheets - Project plans, budget sheets

Google Slides - Presentations - Pitch decks, training modules, team presentations

[Register Now](#)

Location: SAILS Meeting Room

1:00

PM - 3:00 How to Use Google Apps

PM

Contact: Laurie Lessner 5089468600 llessner@sailsinc.org

Did you know if you have a SAILS gmail account you also have access to all the Google apps and a ton of storage space? Create from a full suite of products, similar to what you're used to using in Microsoft Office. Your files are kept online and updated automatically. Log into your Google account from anywhere and have access to all of your work. Share your files with co-workers to collaborate or just have allow others to view and/or comment.

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Google Slides - Presentations - Pitch decks, training modules, team presentations

[Register Now](#)

Location: SAILS Meeting Room

**Wednesday
September
27, 2017**

10:00

AM - 12:00 ComCat Training

PM

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

Learn the basics of processing items in the Commonwealth Catalog;

- lending items to other networks
- borrowing items for your patrons
- understanding the different statuses
- see how to view statistics and reports

- get tips to help your patrons

Be sure to bring along some items that need to be processed (as both lending library and borrowing library) so we can have real-time examples.

[Register Now](#)

Location: SAILS Meeting Room

1:00

**PM - 3:00 ComCat Training
PM**

Contact: Laurie Lessner 508-946-8600 x214 llessner@sailsinc.org
Learn the basics of processing items in the Commonwealth Catalog;

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[Register Now](#)

Location: SAILS Meeting Room

Network Stats July 2017

Circulation:

Total Items Circulated: 332,847

OverDrive Circ: 28,392

All Formats Circ: 361,239

Resource Sharing:

CommCat Items Borrowed: 1,024

CommCat Items Loaned: 638

Total Intranetwork Loans: 65,277

Patron placed holds: 52,880

Overdrive holds: 7,401 (current)

Novelist Sessions: 63,266

Holdings:

Cataloging Requests: 6,745

MARC Records Added: 6,186

Overdrive Holdings: 24,670

Patrons Added: 3,750

Total MARC: 1,301,599

Total Holdings: 4,304,769

Total Patron: 453,463

SAILS

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www.sailsinc.org