

## Automation / Resource Sharing Advisory Committee

November 25, 2003

Attending: Phyllis Keaton, Laurie Shedrick, Karen O'Brien, Daniela Pulice, Gillian Thorpe, Wendy Alexander, Julie Knutsen, Janet Huen, Tom Lawrence, Josh Cohen, Merribeth Advocate

**Minutes** from previous meeting of August 26, 2003 approved

**Resource Sharing Circulation Procedures** <<http://midhudson.org/resource/RS-policies.pdf>> – committee reviewed elements that need to be updated and suggested changes listed below

- Lost materials
  - Lost during system holds by patron
    -
  - Material was lost, paid for, and then found
    - Add “*Lost in Transit – MHLS will reimburse 50% of an item lost in transit only after:*”
      - 1. *Proof, after 30 days, that the item was sent from one library and not received by the other, proved by paperwork or In Transit status*
      - 2. *Attempts to locate the missing items are made including shelf checks at borrowing and lending libraries and a post to the MHLS list to ask others to check as well.*”
    - Recommendation to the DA (1) to collectively chose one of the following options: No library will refund if the book belongs to another agency OR where you paid it is where you have to take up the issue
- Collection development
  - Add “*Libraries may purchase additional copies above and beyond their minimum to be placed as browse copies with no-holds status, but libraries must own at least one copy of a title before making any additional copies non-holdable.*”
- MHLS rotating collections
  - Add *rotating* to title of section
  - Strike “*Items in MHLS collections, including DVDs and CD-books, are not available through system holds. Do not request these items through ILL or system holds*”
  - Add “*All MHLS rotating collections, including DVDs and CD-books, are available through system holds*”
- Have noticed an increase in AV being returned incomplete.
  - When libraries check out material, look for all component pieces. When check in, do the same. Look for problems with items from

other libraries (torn, incomplete, or disks doesn't match title) **before checking it in**, print screen to save last patron info.

- When an item is returned with missing pieces to a library, **do not check it in**. That library should make the initial attempt to notify the patron (phone call within 48 hours) to get the pieces back, before it is sent to the home library or sent on in the holds queue.
- If call to patron doesn't work and item is still damaged/incomplete, send to owning library with the screen print of the last patron info. If a hold was on the item, transfer the hold to the next available copy.

## OPAC

- **Notices-email vs. print**

- Issue about the confidentiality of titles mentioned in e-mail.
- MHLS has determined the title cannot be removed from the email.
- Action 1: MHLS will create a statement that libraries can read to patrons that any email they might get might include the title name.

- **New Look / New Functions**

- Viewed new version of Phase 3 OPAC on MHLS test site. Committee agreed that the out-of-the-box version was attractive.
- Preferred look for the front page was the opening screen of the Brooklyn Pub Library catalog <catalog.brooklynpubliclibrary.org>. Liked their default to keyword search, the brief descriptions of the searches (add *Last name first* to author description). Eliminate *Select Location*.
- Committee consensus to use Brooklyn front page with Phase 3 back end.
- Don't like shopping cart look. Want book bag.
- Committee liked the option to save groups of materials.
- Patron verify screen: Include: help, barcode that shows numbers as it is typed, replace *not wanted after date* with: *Optional: cancel date*
- Action 2: L. Shedrick will create mock-up on the test site of the look the committee recommended, then present to DA at January meeting.

## III Updates

- **Create lists/statistics:**

- Committee discussed how to distribute the finite numbers of review files and establish parameters for their use.
- Background:
  - 160 possible review files, currently varying in size from 5,000-200,000. MHLS can reallocate the size of a file, but not increase the total capacity. Additional files can purchase in lots of 40, for \$2,500
- Could allocate one to each library initially. L. Shedrick would assign by initials to reserve use to just that library. Some libraries may never use theirs, so don't want to over extend the limited resources.
- Some need to be reserved for use only by MHLS staff.

- Some could be reserved to use for sending files to MHLS staff.
- After every library has the potential to be trained and do their own reports, fees for reports will go back into effect.

**Committee Chairperson:** Daniella Pulice will be committee chair for 2004.

**Actions:**

1. MHLS will create a statement that libraries can read to patrons that any email they might get might include the title name.
2. L.Shedrick will create mock-up on the test site of the OPAC look the committee recommended, then present to DA at January meeting.

**To report to DA:**

1. Resource Sharing Circulation Procedures: Material was lost, paid for, and then found:
  - collectively chose one of the following options: No library will refund if the book belongs to another agency OR where you paid it is where you have to take up the issue
2. Have noticed an increase in AV being returned incomplete. See procedure outlined above.
3. E-mail notice statement: MHLS will create a statement that libraries can read to patrons that any email you might get might include the title name.
4. Intention to review of draft catalog at Jan. DA meeting