

Resource Sharing Minutes
Wednesday, June 25, 2003
Meeting Notes

Attendees: Jo-Ann Benedetti-chair, Rob Carle, Mary Fellows, Rawdon Cheng, Sara Dallas, Noralee Itchoak (UHLS), Geoff Kirkpatrick (BETH), Tim Burke, Marcia Middleton, Amy Maurer, Ethel LaPier (APL), Dawn Geurds, Sue Dague (EGRN), Joe Nash (COLN), Jean Marie Cole, Gilliam Leonard (GUIL), Barbara Kendall (BRUN), Amy Williams (TROY), Mena Will (POES), Lorraine Smi (VOOR), notes.

PATRON REGISTRATION

A lengthy discussion regarding patron registration was held. It had become apparent that not all libraries follow the same registration procedures and that the statistical data that we are currently getting from Horizon is somewhat suspect. The ASC asked that the Resource Sharing group make recommendations regarding Horizon patron registration from both the registration perspective and the statistical; what information do libraries need on the patrons that they register and what do they need to know about the patrons that use them. These recommendations will be presented at the July 11, 2003 ASC meeting.

Sara supplied background information concerning Director's Association decisions from 1997 including:

- LAARC idea of Home Library Rule, which carried over to DRA;
- Recognized of chartered and unchartered areas of service;
- Statistics sufficient to meet NYS Annual Report Requirements under Programs, Policies and Services such as total number of registered borrowers, total non-resident borrowers, cardholders not residing in the library's chartered area;
- Developed a 3x5 registration card for all libraries to use and retain, if desired;
- Established basic rules such as: acceptable form of ID and required information such as name, address, phone number, and signature
- Created an UHLAN card to be issued by libraries choosing to do so to patrons not in their chartered areas of service.
- Registration cards for not chartered to serve patrons would be forwarded to UHLS to either retain or forward to the home library.

HORIZON STATISTICAL GATHERING TOOLS

Horizon currently has 3 fields to gather statistical information: Apparently, the label is not universal for the first field. For example, Voorheesville patron registration says "Regis. Location" (UHLS screen says Home Library). This field is automatically filled in (example: VOOR) – it is an editable field. The next field is the **BTYPE**. This is responsible for the circulation privileges of a borrower at your library-default loan period and minimum and maximum fines (example: VOA-Voorheesville Adult). The last is the **BSTAT**, which allows you to generate statistics for specific groups who use your library-geographical areas and registering library info (example: 156 village of Voorheesville, VOOR Voorheesville Public Library).

Those attending the meeting agreed that:

1. Libraries would like a SIMPLE easy to use on-line registration form;
2. Add a field called **Registering Library** that would be an automatic default, non-editable, and placed on the first screen. Rawdon was asked to look into this to see if it could be done, and if statistics could be obtained from this field;
3. Retain current fields: Home Library, BTYPE, BSTAT;

4. Simplify BSTAT to a **single** numeric fill-in representing the geographical areas;
5. Members would fill in all registrations as if the patron was a chartered to serve patron. Those that were not would be forwarded to their home library for staff to revise.

The current "Home Library" field governs the following:

1. Barcode prefixes – 1st five characters for patron barcode: ex. 2 1182, 2 8134
2. Calendar Settings - are used in the calculation for fine accruals
3. Pac & Circ Timeouts - settings regarding activity as it relates to length of time allowed for those functions
4. Lost to Missing Days - both determine how long item information is linked to a borrower's record
5. Claims Returned to Missing Days
6. Reshelving cart setting and days
7. Sorting by name
8. Itype loan period setting exceptions and renewals- Director's Association decision to set maximum fine for books \$3.00 and AV \$5.00
9. Request parameter settings

PATRON REGISTRATION ADDRESS SECTION – LINE 4

Continue to fill in Line 4 with city, town, and state information.

Two questions for Rawdon:

1. Can Line 4 read "City, State" instead of Line 4?
2. Can current City, State box be masked?

PATRON REGISTRATION REPORTS

Rawdon is working on developing a report that will tell you how many new patrons you registered each month, total number of registered borrowers and total number of registered non-resident borrowers at your location.

NEW CIRCULATION REPORT

Rawdon is working on a broad based monthly report using the collection codes that will be based on:

§ My items circulating at my library Example:(VOOR items at VOOR)

§ My items circulating at other libraries Example: (VOOR items at BETH)

§ Other libraries items circulating at my library Example: (BETH items at VOOR)

Categories to include the following: Adult Fiction, Non-Fiction, Serials, Videos (w/DVDs), Audio (tapes book CDs, music CDs), Juvenile Fiction, Non-Fiction, Serials, Videos, Audios (as above), YA Fiction, Non-Fiction, Serials, Miscellaneous

CAN DYNIX PROVIDE CIRCULATION NUMBERS FOR NYS ANNUAL REPORT?

Rawdon believes they can. Rawdon is checking to see if they can be provided in both the calendar year and the fiscal year format.

WHAT REPORTS WOULD MEMBERS LIKE

REQUEST REORDER REPORT -- Requested by Amy at Troy

Response: Rawdon is working on a script to be downloaded to your desktop for you to run as desired. He will be posting directions on the INTRANET as well as sending an email on how to do this. Call Rawdon, Jonathan or Rob for help. Rob will install onsite for those who want it.

DAILY CIRC ACTIVITY REPORT -- Requested by Ethel at APL Pine Hills

Response: If your workstation has Horizon installed with administration privileges, this information can be found in the AD HOC Reports under Daily Report Overview

CIRCULATION ACTIVITY BY THE HOUR --Requested by Dawn at EGRN

Response: Rawdon made a note to look into this. There is an AD HOC Report entitled Monthly Activity Report by Hour, but it is not a daily report.

REQUEST REPORTS --Requested by Dawn at EGRN

Is there a report that can separate the number of holds that are placed by patrons online from the number of holds placed in the library?

Response: Rawdon will look into this.

OWNING OR BORROWING LIBRARY – CHECKOUT PERIOD? OVERRIDE? FINES?

There is a need for consistency/standardization as libraries each have their own checkout time periods, their own renewal or non-renewal policies, and their own daily and maximum fines. When it comes to what governs the checkout time periods for items, the renewal time periods and what patrons are being charged for fines, WHOSE POLICIES GOVERN THESE TRANSACTIONS? Library staff members related a variety of situations that are currently happening. This has become a customer relations issue and very confusing for patrons. Marcia Middleton gave a possible explanation for why some things are happening. There are two tables: a renewal table and a loan period table, and these must be set the same. If they are not, you will have inconsistencies.

Although the Resource Sharing Advisory Council cannot make policy decisions, we can make recommendations regarding these issues. SEND EXAMPLES TO ROB AND MARCIA OF CHECKOUT, RENEWAL AND FINE PROBLEMS. They will need the patron barcode, the item barcode, what the item checked out for or renewed for, and what the checkout time frame or renewal should have been, what the fines are, what the charges were, etc.

BLOCKS THAT CANNOT BE DELETED

For blocks that cannot be deleted, Rob suggested to try waiving it. Marcia recommended trying to delete it the following day. If it is a security issue because you do not administration privileges on your workstation, send it to your system administrator to try. When you have tried everything and you CANNOT delete a block, please send that information on to Rob. If he cannot delete it, he will refer it to DYNIX.

Meeting adjourned around 11:30 am. **Next meeting:** July 24, 2003 at UHLS at 9:00 AM.

**RESOURCE SHARING ADVISORY COUNCIL
INTERLIBRARY LOAN**

Wednesday, June 25, 2003

Meeting Notes

Attendees: Jo-Ann Benedetti-chair, Rob Carle, Rawdon Cheng, Noralee Itchoak (UHLS), Dawn Geurds, Sue Dague (EGRN), Joe Nash (COLN), Gilliam Leonard (GUILD), Barbara Kendall (BRUN), Mena Will (POES), Lorraine Smi (VOOR)

EXTRACTING INTRALIBRARY LOAN STATISTICS FROM CIRCULATION REPORTS

Current circulation reports on the INTRANET include:

§ Circulation by Collection Code (CKO location)

§ Circ by Collection Code (Owning location)

§ Circulation by ITYPE Report

Report #1 - A report of all circulation activity of your library's items and member library's items checking out and renewing at your location. If you extract all the items that are not owned by your library (do not have your collection code descriptor* for example for Voorheesville it is VO) these items would be considered the items that your library **BORROWED** from UHLS member libraries. You will also have a total of items circulating at your library as well. *Remember to include any UHLS collections that circulate at your location for example Videos as your circulating items.

Report #2 – A report of all circulation activity of your library's items checking out and renewing throughout the system. If you take the figure you extracted of your items from Report #1 and subtract them from this report, you will now have a total of items that you **LOANED** that have checked out and renewed at other locations.

Rob passed out a sheet #CKOs and Renewals by Collection Code which you could use to help you figure this out.

Because all members are currently counting manually, it was suggested that some of the smaller libraries such as POES compare her manual figures to the UHLS reported figures and see how they match up.

GAC MEMBERS

Consolidated Pricing vs. per item pricing: Currently we are using consolidated pricing. Noralee is looking into whether this is cost effective. She will report on this at the next meeting

Jill asked if Rachel could on occasion have a meeting devoted to issues and concerns for the UHLS GAC Members. She will get back to us with a date and time. At that meeting, she is going to ask Gordon (BETH) to discuss how he is using HORIZON for checking out interlibrary loans.

Rachel also urged any members who think they might be interested in joining GAC to attend.

DROPPED OUT OF SYSTEM BOOKS

Noralee passed out the "new" lilac slip for members to use for items that are dropped off at their library. This slip is NOT to be used for interlibrary loans.

Meeting adjourned at 12 noon. **Next meeting: July 24, 2003 at UHLS at 9:00 AM.**