

## Resource Sharing Advisory Council

September 15, 2005

ATTENDEES: Betty Albright, Rob Carle, Joe Nash, Joe Thornton, Amy Williams

MINUTES FROM LAST MEETING: Joe Thornton distributed the minutes from the previous meeting (July 20, 2005) and they were approved without discussion.

COURIER: Amy saw a “forward sort” form on the CDLC web site, and wondered if we’re supposed to (are allowed to) use it. Joe T will ask Jo-Ann.

DAILY CIRC REPORT: At VOOR’s request, we wrote a variation of the “Daily Circulation” report on the web reports page (<https://horizon.uhls.lib.ny.us/reports/>). The newer version shows checkins as well as checkouts, but only for one day at a time. The original “Daily Circulation” report shows just checkouts, but for the number of “days back” that the user requests. VOOR would prefer a combination: checkins and checkouts for a specified number of days back. Joe T is struggling to provide this because of the structure of the tables that contain the circ data. He will continue to work on it.

“AGE” REPORT: VOOR also asked for a report that shows library usage by age. Joe T says that this is a problem because we don’t keep a record of circ transactions for more than thirty days. We have two options:

1. a “snapshot” report that could be run at any time that shows usage by age within the past thirty days.
2. a monthly report that we would run and keep permanently on the intranet.

BTYPES: We have started to change Youth Btypes to Adult Btypes with a program that we run once a week. All Youth patrons who have reached an age specified by their home libraries (18 for most) are changed to Adult Btypes every Friday. No problems have been reported related to this new procedure.

Amy asked if we can search by birthday in stafpac. Because that’s out of our control, the answer is “no” without custom programming.

RENEWING REQUESTS: When an requested item is checked out to a requester other than the first one in the queue, the system prompts, “Do you want to renew this request?” We changed the default from “No” to “Yes” in order to prevent the first requester in the queue from being dropped. No one has noticed any adverse effects of this change.

**EXPIRED HOLDS:** Every Friday we have been deleting all holds that were canceled or expired more than thirty days earlier. No one has noticed any adverse effects of this change, and the expired holds list seem to be cleaned up.

This topic engendered a long discussion about expired holds. Joe Nash said that COLN often can't find the items on their shelves that the system reports as "expired holds," but that eventually they show up.

We agreed that it's important that staff check items in when clearing their hold shelves.

**GUIDE TO THE REQUEST PROCESS:** VOOR had asked for a guide to the workings of the request process (e.g. "Why do people move in the queue?"), to be used primarily by circulation staff. Rob produced a draft since the last meeting and distributed it for us to proofread and comment on.

We recently put "location priority" into effect, which should reduce unnecessary transporting of requested items to pickup locations that have the requested items on their shelves.

Amy reminded us of the extra work that TROY needs to do to distribute requested items to the appropriate branches. This is a function of the request matrix, which Rob reported has recently been revised by Rawdon and himself, and which should now improve the request process for APL and TROY.

Joe T will ask VOOR to clarify what parts of the request process they want documented (e.g. the behavior of the queue, the procedures of the staff,...).

**HORIZON BASICS CLASS:** Rob will hold a "Horizon for Beginners" class on Wednesday 9/21 at UHLS, and he asked the group for input.

**The next meeting is scheduled for Tuesday, October 18, 2005 at 9:00 AM at UHLS.**