

## Resource Sharing Advisory Council

January 17, 2006

**Present:** Betty Albright, Rob Carle, Marsha Doyle, Dawn Geurds, Geoff Kirkpatrick, Amy Maurer, Joe Thornton, Amy Williams

**Minutes of the last meeting:** Joe distributed the minutes from the previous meeting (December 13, 2005) and they were approved without discussion.

**Renewing ILL items:** A library had complained that another library renewed an ILL item for one of their patrons, ignoring physical markers (red rubber bands, notes,...) and a Horizon popup saying that renewal was not allowed. The block was overridden and the renewal was allowed. At first we thought that the problem might have been that the item didn't have an "ILL" IType, but that turned out not to be the case. The "problem" is that the system allows everything to be overridden (as it should), and the offending library simply ignored the block and other warnings. Resource Sharing strongly advises libraries to avoid overrides on any item that is not yours.

**Circulation reports:** Dawn asked why the three reports that EGRN uses for circulation statistics do not all match (two match, one doesn't). The consensus of the council seemed to be that the discrepancies can be caused by the choice of fields used to create them (e.g. location, collection, Btype), cataloging errors, or slight changes made to the data between one running of the report and the next. The important thing is consistency, and we recommend that libraries use the same reports from month to month and not worry about discrepancies in reports that they don't use.

**Bags:** No change of opinion, which, by the way, is not good. Some comments:

- Plastic ties are littering the floor by circ desks.
- We need many more if we're going to use these. We ran out of our initial supply by 8:20 AM.
- Too much work.
- They're an invitation to steal.

Joe repeated that use of the bags is not mandatory, but the libraries consider them to be *virtually* mandatory, since they inferred from the discussions about the bags that UHLS will be less supportive of claims of stolen material if the bags are not used.

**Screencasts:** Rob demonstrated some of the screencasts that he's created and made available on the new *Training* web page: <https://horizon.uhls.lib.ny.us/twiki/bin/view.pl/Training/WebHome> (login is the same as the intranet's). Rob is looking for feedback on the existing screencasts and suggestions for new ones.

**Overdues not aging to Lost:** Rob reported that he and Rawdon have identified the cause of the problem where *Overdue* items don't age automatically to *Lost*. The problem is related to our customized notice program, which, unlike the standard Horizon notice program, did not update item statuses to *Lost* even though it printed notices for patrons saying the items were lost. Rawdon and Rob believe they have corrected this problem, but we'll have to wait for some of the current batch of *Overdue* items to age to *Lost* to be sure.

**Expired holds:** The *Expired/Canceled Holds* reports still have a lot of items that don't belong there. Joe will take another look to try to find out why, since he's already using a pretty simple, drastic method to remove all expired and canceled holds. It may be that the problem items have no expiration date. Joe will investigate.

**Deleting Lost in Transit items:** Marsha asked about the procedure for deleting *Lost in Transit* items. Geoff went over the "check in damaged" procedure, and Rob said that after they're checked in, people can just mark them *withdrawn* and tell Rob to delete them.

The "check in damaged" procedure:

1. check the item in to a staff person. A popup will say, "This Item was on Hold for Person X, do you wish to check it out to Person Y?" (click yes)
2. Then another popup: "Do you want to renew this borrowers request?" (click yes) The original requester then gets placed back in the queue in their original position. This open request is then free to be filled when an item becomes available.
3. Check the item in "Damaged."
4. Delete it.

**Payment history:** Amy W asked if we could change the default start date when looking at a patron's payment history. It now defaults to *today* and you have to enter 1/1/03 to see the entire payment history. Rob will look into making 1/1/03 the default instead of *today*.

**Telecirc renewals:** Amy W asked, and Joe clarified, that Telecirc uses the ALL library's circulation parameters when doing renewals, and the HIP use the checkout location's circulation policies.

**The next meeting is scheduled for Tuesday, February 14, 2006 at 9:00 AM at UHLS.**