MID-HUDSON LIBRARY SYSTEM
Resource Sharing Advisory Committee Meeting

Date: August 6, 2019   **Location:** MHLS Auditorium

Committee members attending:

	AnnaLee Giraldo (Columbia)	X	Debra Kamecke (Greene)
X	Lynn Place (Columbia)	X	Jeanne Buck (Putnam)
X	Brian Avery (Dutchess)		Gillian Thorpe (Putnam)
X	Rhiannon Leo-Jameson (Dutchess)	X	Katie Scott-Childress (Ulster)
X	Catherine Benson (Greene)		Jessica Kerr (Ulster)
		X	Laurie Shedrick (MHLS)

Staff Attending: Thomas O'Connell (ILP Operations Supervisor), Nina Acosta (Assistant ILP Operations Supervisor)

Lynn Place (Columbia) served as secretary

Motion to approve minutes from May 23, 2019 by Jeanne Buck and seconded by Brian Avery.

Member update to the RSAC: Rhiannon Leo-Jameson as Dutchess representative replacing Julie Spann, Dutchess.

Discussion Items:

1. One-line Patron Registration
    a. The Committee reviewed "Get a Library Card" button on the catalog page. The button will lead to a page that will include a dropdown menu listing libraries and a path to the registration they are offering. The library would have to option to provide a Sierra Online Registration, a locally produced registration, a link to their registration policy, or a statement instead of a link that informs the patron (example: "Onsite registration only, please visit the library". An action memo could be sent to gather the link(s) or statements.
    b. Online registrations through Sierra generate a standard "Welcome Letter" that is generic and needs to be updated for accuracy and clarity. It is not customizable. Suggestions were made to make the letter more descriptive and welcoming and streamlining instructions on creating a PIN.   A Sample Letter is attached.

2. Resource Sharing Standards for E-Resources
    a. The Committee discussed how items not available to everyone should be represented in the catalogue. Items not available to all patrons must be registered as such. The wording should include "residents" so patrons understand whether their library has purchased these streaming platforms.

       Adding all streaming service records would double the size of the catalogue (this does not include updating and maintaining). Hoopla alone has over 300,000 records. Including only master records would cut down on this number but individual titles would not be represented in a title search. The master record results could include the subscribing library.

       Discussion included whether all subscribing libraries will want to include their listing for Hoopla, Kanopy and other pay-per-view products in the catalogue. An action memo will be issued to every library asking what streaming video platforms they subscribe to and if they want to include them in the catalogue. The action memo will have an "opt out " option for libraries who do not want their subscriptions to appear in the OPAC.

b. Material types
Current e-content material types do not fully represent the materials available. E-comics, E-music and E-Courses were discussed as new material types to make items easier to identify.

c. Standards for cataloguing e-resources
The committee was informed of the cataloguing process for OverDrive items. When a library makes a purchase from OverDrive, an overnight API query transfers bibliographic and order data to SkyRiver. The data also includes the API scripts that communicate availability to the Encore interface. SkyRiver has 48 business hours to supply fully formed MARC records to MHLS. Usually, the turnaround is less than 24. MHLS cataloging loads records received the same day, usually within the hour of receiving them. If received after hours they are loaded within the first hour of the next business day. The committee noted that it is important for purchasing libraries to be aware of this timeline when making their purchases to insure the title is available to patrons by their target date. Records ordered on a Friday will likely not be available until the following Tuesday or Wednesday.

3. Changes to Patron Data Entry Fields
   a. Town Code Field Revision
   Errors and omissions in the current list of town codes and the best way to make the corrections were discussed.

   b. PType Field and Home Library Field
   The best way to use the PType field and Home Library field were discussed. Consensus was that the PType field should be used for patron affiliation, freeing the Home Library field to be used for patrons to determine their default pickup location.

4. Knowledge Base
The Committee reviewed and endorsed the new Knowledge Base site

5. MHLS Server to Amazon Web Services (AWS) update
The server move is scheduled for September 25. It will begin shortly after midnight and is expected to be completed by 6:30 am. The move will require an IP address change which MHLS is facilitating with all known vendors. Information will be included in the DA Packet report in Section 2 Integrated Library System & Cataloguing Services.   Libraries who are using Envisionware may receive instructions on the changes that need to be applied in their administrative dashboard. Comprise (SAM) libraries will NOT need to edit their IP address target.

Motion to adjourn at 12:10 by Jeanne Buck, seconded by Lynn Place

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To include in DA Business Meeting Agenda Attachment as Action Items:

Action Item: Online Registration Available in Encore

Background: The opportunity to create an account online is expected in today's digital environment, particularly as libraries offer and publicize more online resources.

Issue: We do not currently offer the opportunity to open an account in the online catalog (also known as Encore or the OPC) environment.

Recommendation: Including a button to a new "Get A Library Card" page from the front of the online catalogue will expand the opportunity for residents to become patrons and use their library, while removing the obstacle of figuring out how to do it. Each library can supply information including their process for account registration.

An action memo would be distributed to ask what information the library wishes to have linked to the [Get a Library Card](#) page.

See: Get a Library Card: https://midhudson.org/get-a-library-card/
Status: Discussed at the August 6 RSAC meeting; Action Item at September 6 DA meeting.

Action Item: Town Code Field Revision

Background: The Town Code field in Sierra was developed to be used for gathering statistical information beyond what can be provided in the home library or Zip Code field. The Town Code field helps to define more closely where the patron resides. It becomes a very powerful field in examining the boundaries related to the financial support of member libraries at the local level, and is critical in defining how an outside community is impacting a particular library.

Issue: The original build of the list was not comprehensive in defining communities to the extent that is needed today. Expanding the list to include all towns, taxing districts and areas of overlap would improve the ability to report on and understand the use of our library collections and services.   The Town Code field is managed in Sierra as a fixed field in a numeric table. The statistics and indexing are accomplished through the table line number and not the label or name in the field. Moving elements to new lines will disrupt the continuity of the reports. Historically, we have simply tacked new additions to the end of the list.

Recommendation: The Resource Sharing Advisory Committee endorses the need to expand the list to include the necessary towns and taxing districts. The committee recommends that the new additions be grouped as best as possible and added to the end of the standing list, if the additions are found to be few. The change would ideally take place at the end of the calendar year to create a clean demarcation line for statistical purposes.

Status: Discussed at the August 6 RSAC meeting; Action Item at Sept. 6 DA meeting.

Action Item: Ptype as Library Affiliation indicator, freeing Home Library to be used as a Patron Pickup default indicator

Background: The Patron record in Sierra has two fields that currently define the patron affiliation: Ptype and Home Library. In a recent release, the ability to select a default pickup location in the online catalog, has been tied to the Home Library field.   Currently libraries rely on the Home Library field to identify the library patron affiliation. The Home Library field is also used in statistical reports, including the State Annual Report, and in authentication with vendors.

Issue: Patrons routinely pickup items at libraries other than their own library. Being able to set the default pickup location to a library other than their own, requires giving them edit access to the Home Library field from within their Encore accessed account. If that change is made, the field will no longer be available to determine which library a patron is affiliated with as a taxpayer. The PType field will exclusively define to which library the patron is affiliated.   In the case of non-residents, whose PType currently does not define affiliation, the PType codes could be expanded to include each library with a non-resident PType. (example: Patterson- non-resident)

Recommendation: The Resource Sharing Advisory Committee recommends that the Home Library field no longer be used as a means of affiliating a patron with a member library. Instead this designation should be defined by the PType exclusively.   The purpose is to provide a more streamlined process to patrons placing holds in selecting a default pickup location.

Status: Discussed at the August 6 RSAC meeting; Action Item at Sept. 6 DA meeting.

Action Item: New Material Types for "e" content

Background: Identifying discrete Material Types helps users to refine their search in the catalog, staff to manage collections, and report statistically at a more granular level. As we begin to bring in new types of material in the form of streaming and e content, we need to expand our current definitions.

Issue: We are currently using e-resources to define any content that is available online, with the exception of e books, e audio and e video.

Recommendation: The Resource Sharing Advisory Committee recommends that the following material types be added to our Sierra interface.
eComics, eMusic, eCourses

Status: Discussed at the August 6 RSAC meeting; Action Item at September 6 DA meeting.

Online Registration Confirmation Letter

Welcome!

You have successfully registered online for a library account.   A wealth of information is now at your fingertips! This account will be reviewed by library staff within 30 days to verify that the information is complete and meets the established requirements for membership.

Your library card number is 1703841

The library card number, or barcode, as it is sometimes called, is necessary to access online resources and to request library items. If you haven't already done so, you will need to create a PIN (Personal Identification Number).

To create a PIN:

    1.   Visit search.midhudsonlibraries.org/patroninfo
    3.   Enter the Library Card/ Barcode in the barcode field
    5.   Click Submit
    6.   You will be prompted to create a new PIN and Verify it by retyping it.
    7.   Click Submit

You should now be logged into your user account. Select My Account from the top right menu to review and make changes to your account information.

You are now able to use our e-resources:
(http://midhudsonlibraries.org/resources_index.html)

To borrow physical items at any of our libraries you will need to visit your local library (http://midhudson.org/libraries/) with valid identification.   Libraries have different ID requirements for a library card so be sure to consult with your local library's guidelines BEFORE heading to the library!

Again, welcome! Your library offers a wealth of resources, services, and materials. If you would like any additional information, please contact your local library.