Good morning and welcome to what we hope will be our first SRCS Town Hall meeting. What I would like to do is to thank all of your for your participation in SRCS and for coming in today. I would like to give you a little update before we get into the meat of the day.

Currently we have 139 libraries participating in SRCS. That is 106 Public libraries, 31 Academic libraries and 2 Special libraries, including the State Library. We have approximately another 30 libraries who are committed to joining Phase 1, but haven't jumped in yet, who will be trickling in over the course of th13e fall.

Hopefully you can see my screen. What is up there are some statistics as of late in the day yesterday. In the month plus a couple of days that SRCS has been up, we've had 13,000 simple search requests done. A smattering of numerical and alphabetical searches and almost 3,000 advanced searches for a total of 16,000 odd searches in SRCS.

The figure below, which is actually the figure I have been reporting in the past, is the number of total searches done in the system. That is basically the number of simple searches times the number of databases or libraries that search was compared to. Ideally this would be the 16,000 times the 139 libraries. Most people aren't searching everything all of the time, so it is a little bit less, but still it represents nearly 900,000 searches that have been done in just over a month.

We've had 38,000 logins. Most of which I am very pleased to see have been Guest logins. That is the way the system is designed to work. Then we have had 3,539 requests placed in the system. So I am very pleased to see that the system is getting used.

This is a summary, as of yesterday, of what is active in the system right now. We have 21 requests that are awaiting approval, so at some point in time I will be talking to these people asking why they have this turned on. We had 134 requests pending as of yesterday. There was one conditional. There are basically things in every status, so this just gives a nice overview of how the system is being used.

I just want to remind you that at any time you can type in your questions in the chat window as they come up. I have a number of questions here that were submitted in advance that I will go through first. Once we finish those, we will be taking questions from the chat field.

For this first question, I am going to do a quick and dirty search here.

By now everybody should be familiar with how the search interface works, but we've gotten a question about how a patron is supposed to understand available vs available for loan? We are going to stop here and look at this title. Ok, we have a number of different formats on this record.   You can see from the top of this record that all of the print copies are available for loan; the audio CD copy is available for loan. Down here we have an Ebook format. Most of

these say no copies available, but one does say copy is available. But there is not Request This Item button.

This is admittedly a training issue. This is something that we all are going to have to face and deal with. One that will take a lot of handholding.

Hopefully together, over the course of the fall we can come up with an easy way to explain this. Remember, this status comes directly from our library catalogs. Available just means that the item is not checked out, nothing more. If that item is available, and is held in a lendable location through SRCS, then and only will the Request This Item button appear. It is a training issue, but not one that has been insurmountable in other states.

Q: The next Question is "How does the NCIP TLC thing work? This has never been sufficiently explained to me. I don't know what to do to make it work, because I don't understand HOW it works."

A: NCIP is a one-way communication system that links SRCS to your ILS. Currently, SRCS is set up to link up with Evergreen Indiana, TLC, a Polaris and a SirsiDynix library. These are in various stages of completion.

When you update an item in SRCS, NCIP then passes that information to your ILS, updating that record for you. The advantage to this is that you don't have to check things out twice. Once in SRCS and once in your ILS.

An offshoot of this is NCIP's ability to use your ILS patron database to authenticate users. There is a catch. Users do need to log into SRCS, using their ILS credentials, in order to be recognized and to activate their account.

Auto-Graphics has prepared a nice handout on the difference in processing with and without NCIP. It is available on the SRCS information page. Hopefully that will help to cover some of your questions.

Q: Another questions is "Where do the circulation rules need to be changed? in SRCS or TLC?

A: As always, it all depends on your definition of "circulation rules". Use the LENDING screen in Maintain Participant Record to indicate whether item types circulate or not. This screen is also where you can set your default loan period, and renewals. You do this for each one of your format types. For items set to NO, that will block requests coming in for items that you don't want to loan, such as CD-ROMs. In order for these settings to work, you have to check this box at the top. If you don't, then your default loan period is your setting in the DAYS TO RETURN found at the top of the Maintain Participant Record. We are recommending setting this to 45 days as a fallback.

There is a major exception. If you are running NCIP, then your ILS has the final say on the circulation period. If you are running NCIP, then the DAYS TO RETURN box will not appear on your Maintain Participant Record page.

You do need to set the lending formats to determine the types of things you are willing to loan.

Q: Our next Question - "We've had several requests go to "Retry" status. Would you explain the difference between the "Delete" and "Cancel" options and why we would want to use one over the other."

        Let's start with Delete – This option flags a request for deletion. The request is deleted during midnight processing. Cancel – This option indicates the ILL request is cancelled. The system automatically deletes Cancelled requests after the Not Needed Date has expired.

        Retry - This indicates that the Lender suggests that the item is currently unable to supply the requested material, but may be able to supply the material at a later date. Usually, this is a manual status change, however SRCS will change a request to retry if a lender is skipped because the library is closed on the day that the request should have gone to them. You can restart these by going in and selecting Approved-Send and hitting Submit. You can even edit the list of lending libraries.

Q: There is a question here – is there a way for the system to recognize that items are the same and group them, so a request can be made for a longer lending string rather than having to request items from each library individually as each library says they can't supply it.
A: If I am understanding your question correctly, just like the display screen can be clustered or merged, by Author/Title, Author/Title/publisher/edition, and the like. The request goes out to all of the items that match the criteria of that search.   Though it is automatically looking at a broader sweep than just the one copy attached to the record, assuming that the Any Edition box is checked. You can also always go in and manually add libraries to that search. I realized that this is not really clear, but I will try to get something up on our information page to make that process a little clearer.

Q: One of the questions we got is "Can we add a lending string to a previously requested item?"
A: The answer is yes. That is very easy. I am going to go down to one of these RETRY and select the same one again. I just go down to the lending field and type in the code for whatever library I want. Spelling does count. I can just type these in, change it to Approve-Send and then hit submit. It would then go out to all of the libraries in the field.

        The data behind the library code is the number of days it stays in their pending file, followed by their call number. You do not have to add that information. You can just put in the library code, but then the libraries will have to look it up.

Q: We have had a chat question. Where it says No Current Lender, does that mean it's unavailable to lend, or there is no library that can lend it at any time?
A: Basically that means that no body at this time can provide it. You can always go back in, add more lenders to the lending string and send it back out. It may bounce back because the record still says that it is checked out or not in an available status. But, yes, you can always send these back out.

Q: The next question I have here, is we had a call from a library who said they are mistakenly shipping an item to us. The borrowing library has an Undo Shipped status but the lending library does not. The question is, is that based upon their ILS or is this something that needs to be corrected.

A: This quite honestly is something I have not encountered before and cannot find in the manual, so I am just going to have to ask and get back with you.

Q: The question is "What is the status of 'conditional'?"

A: I do not have an example on this one to show you. It is exactly what it is in any other interlibrary loan request. We are willing to provide this book, but ... there is a charge; we ask that you limit it to in-library use only, it's at bindery right now can you wait two weeks? There are all sorts of stock questions and answers for that. What you do is go into the request and accept the condition or say no to the condition. In which case the request would go on to the next available potential lender.

Q: Now we have a bunch of questions about the Bookstraps. This one asks if there will be any developments for these, especially for the libraries who aren't running Illiad?

A: The big thing to remember about the Bookstraps in SRCS is that the bookstraps are a local option. No one has to use them, unless you want to. We are somewhat limited on the settings. Right now, Bookstraps are a global setting. In the configuration setting, we can turn them on for everyone or off. But there is not a whole lot in between that. A-G is considering giving libraries local control for configuring Bookstraps in a future enhancement. It is on the list of items being considered, but there is no timeline given as of now. The Usergroup will be drawing up a list of future enhancements for next year and we will try to make sure that this is on the list, but there is not guarantee that this will be a quick fix.

We have a bunch more questions.

Q: Will a request stay in retry until it is cancelled or deleted?

A: A request stay in retry, or actually in most of the statues, until it is manually cancelled or until the Not Needed After date has been reached. At which time it will be cancelled, taken out and ultimately deleted.

Q: When a patron submits a request "Patron's Contact 1" is the label for the email address field. If a patron updates that field, say with their phone number, the user will not receive email updates about their request and staff are not prompted to call the user. This situation has happened to us already. Would Auto-Graphics be willing to update the label for this field to something more clear, such as "Email Address"? Are other sites using this field for any other data beside email address?

A: I also got that question earlier in a slightly different form, saying that it would be useful for the desk staff to have the contact information listed on the Bookstrap, since many of our patrons do not have email or prefer telephone contact.

        In the configuration set up for the Bookstrap, which once again is a global setting, there are two patron contact fields. If you filled out those fields when you set up the patron record.

One is for email and one is for telephone. When we are finished today, I will turn them both on so starting tomorrow you should see them on your bookstraps.

Q: If request is going to more than one library why do we have to manually add to the lending string?
A: The requests are going to the various libraries in the lending string in sequential order. They are being compared to your preferred lender list, then failing that they are going through the entire lending list to the libraries who own the item and have it available. So, if for some reason, and I cannot give you those reasons off the top of my head, it fails and comes back to Add Lenders. My assumption is that there was some combination of events that did not allow the request to go forward. It you get an example of that, take a look at the lending status of the item at some of the libraries on that lending list (history) to see why the request failed. You can always send me some of the request numbers and I can take a look for you. I am assuming the something is funneling it down, but I am going to have to do some research to figure out exactly what that is.

Q: Can we turn on the Bookstraps locally?
A: No. This is a global feature. They are either on or off for everybody. They should be on everybody's Dashboard. Here's maintain Bookstraps. This library doesn't have anything ready for that. Wait, I changed the setting over to Printed or Unprinted, which was another one of the questions we got in, in that case dealing with the Shipping Label.

Q: Is it possible to print the Shipping Label a second time?
A: You can change these settings up at the top, to show Printed or Unprinted, then you can see all of the records you need to print extra copies of. The one risk on this is that it is very easy to print the same one multiple times. This is all a local option and shouldn't be a big problem.

Q: The other part of this question is it possible for the lender to print out the Bookstrap?
A: It is possible, but we have that feature turned off because it violates the new version of the ALA code which states that the patron information is private information belonging to the borrowing library, since it is their patron and should not be passed through multiple hands.

Q: I have one other question here while we are on the Bookstraps. My last question here is would it be possible to have a line on the request form asking which location the patron wants the item sent to and have it print on the bookstrap. That would solve a problem we are having of having to check a second system to see where to send it.
A: This is possible, but it would be a system wide change and we are going to have to look into exactly what type of information this would have. Realize, that after we start launching Phase II, which will next Spring, we will be investigating the ability for the patron to change their delivery location. Right now, their default location is their owning library. When we get into some more multi-branch situations, we will probably need to turn on the ability – I work at the State Library, I live by an Indianapolis branch and I go visit the IUPUI campus frequently. I should be able to place a request as a patron of one library and have it delivered to another location where it is convenient for me. That is a capability within the system, that we have not

yet turned on. We probably will be looking into this for Phase II. Ok, that is all of my questions.

Q: We are seeing items automatically moved to the "Not Received" category for libraries that have 1 day a week courier delivery. Is there a setting that can be changed for those libraries that can allow more time for them to receive the item?

A: I would recommend increasing the Days to Supply. The default to here is seven days, but I would recommend moving it up to 10 or 14. That will probably help a great deal. Meanwhile, I will check into that to see what is triggering it, but I suspect that it is the Days to Supply field.
[The Days to Supply is what is triggering the "Not Received" status.]

I realize now earlier when I was talking the default loan period. I am on an NCIP library so I don't see that default loan period, and I told you Days to Supply, and that was incorrect. It is the field right below the Days to Supply. It says the Default loan period or something like that, but I don't have the correct name for it here. Days to Supply is what I think is triggering the Not Received.

Q: The requests appear to be going through the libraries a-z, versus an algorithm. Is that correct?

A: Yes, it is. When it is going through the preferred lender list, it goes through in the order you enter them. For the system wide, it does go through the list alphabetically but it is only checking the libraries that own the item and have it available in a lendable location. This functions very similar to a randomization algorithm. It is not quite the same but in other states it has not dumped everything in the A's.

Q: A staff member received a book that in the system is marked retry but they can't receive it. So a library sent it to them, but once it was in the retry status they couldn't receive it.

A: We have had a number of these. Primarily because it is a new system. I am considering these as mostly teething pains. What I would suggest – A. I would contact the supplying library and ask if they could update that request to Approved-Send. You can in certain instances go down here to correct items like that. Because the items below that line are your requests in the pot of the other library. You cannot do all of the statuses. Retry is one of the ones that you cannot get to. So I would contact the library to see if they can update it so you can mark it received.
[In this particular instances, the requesting library would have to go in and resend the request to the supplying library before they can updated it to shipped.]

Q: We are a TLC NCIP library. We have had multiple instances of items that appear in our ILS as holds for a library but there is no matching request in SRCS anywhere. Why would this occur?

A: In Evergreen, when we see this happening, it is because it's expired in SRCS and moved on to the next lender. But it is not automatically falling away from the NCIP library's pull list. We are not familiar with the way TLC works. My recommendation to see if this deals with it, and we will confirm this with Auto-Graphics, I would try to increase your Days to Respond. My first thought would be that it is hitting that threshold and moving on. So try increasing it

by a day or two and see if that helps the problem. Meanwhile I will ask Auto-Graphics if there is another trigger for this.

Q: Why are Borrower's requests passed to local system for NCIP libraries?
A: Anna, I am going to leave this one to you. This is one of ours. Right now with NCIP, particularly with Evergreen, I cannot speak to the TLC setup, but with Evergreen in order to prevent materials that are targetable in Evergreen to pass between the libraries from being shipped instead as SRCS and having a whole lot a whole lot of extra backend things have to happen. Including dramatically increasing the amount of work that staff need to do to process them. We do not allow targeting within Evergreen. So if a request is allowed to be send locally, which is what happens when you override and place some of them, what is does is to create an unfillable hold within Evergreen and fails. That is why you are seeing that. We are working on it. Trying to figure out what the best method would be to deal with that.

        And we are going to begin transiting DVDs within Evergreen in a few months. So hopefully, that will help to alleviate some of this problem as well.

        The other possible thing that may help, is in the Maintain Participant Record. There is the checkbox for "Show Items Owned by this library." If you change this to NO, that may reduce this slightly, but is actually being caught at a different point, so I doubt it will do away with it. It will not warn the patron in that case. So, warning the patron is probably useful.

Q: We have noticed that when a patron does a search without first logging in (looking things up as a Guest), but then, once they find the item they want, they go to log in, they are pushed back to the main screen. They then have to repeat their search to find that particular book again. Is this something which could be adjusted so that patrons don't need to repeat their search if they first find the book they want as a Guest?
A: Truth in advertising right now, I do not know. One of the things I learned earlier this week that we had something wrong in the settings of the Show the Request button. We told people to use the Staff, Patron, Institutional and the Guest – Require Login setting. I found out earlier this week that we actually got these backwards. When you use that Guest – Require Login it is just that. They can't do anything as a guest. You have to log in first. I believe, and I have not had a chance to experiment with this, if you use the Guest, it will allow them to login. It may save their search; this is one of the things that I need to test, but I have not made it yet. So try changing that.
                  [Neither option saves the search. They will have to repeat their search.]

Q: Another point for first time users. They are likely to search without realizing what they need to do to place a request. Could we have a "sign in to request this item" button that would let them know they need to sign in with their library logon to request?
A: Under User Administration, you can put whatever text you want to identify the login buttons. You can use up to 240 characters on the main text and set the username and password prompt to whatever. You have some options here, so you can warn them of what to do. So maybe that will help. That affects the login link in the upper right hand corner.

Q: A question about whether any NCIP libraries are live yet.

A: Yes, we have several. We are still working out the kinks. TLC, that consortium, the Evergreen consortium as well as upcoming implementations which are not online yet but are coming of Polaris and Sirsi. If memory serves, we still have one of the TLC libraries that there is still a problem, but off the top of my head, I do not remember who it is.

Q: A book came in for our patron with a due date of December 2016, when I checked it out through Evergreen it was the standard 3 weeks. Which due date do I go by?
A: Technically, the due date provided by the lending library is the accurate one. But that means that you will have to edit all of the due dates. That is a known issue. I am assuming that your automatic due date is shorter, so in effect you have a renewal built in there. I do not have a good workaround. It is local option as to whether you want to edit the due dates or if you just want to go with the shorter due date.

        For Evergreen libraries, we are trying to figure out if we can use the NCIP record due date so that is not a manual process, but that will take some development and a little bit of time before we have anything definite on that.

Q: A library received a couple of books back. She logged into SRCS to check them in, but when she scanned them into the ILS they wanted to go to the library that had the SRCS request. When they clicked on the titles, the Item Barcode displays a different barcode & not ours for both books.
A: I have a suspicion, because we have seen this happen already. Depending upon the timing of how you capture the books, what information is fed in and whether you are an NCIP library. If you are an Evergreen library, I can tell you this definitely happened. Where NCIP did not perform a clean circulation. So the item when into transit when you captured it that first time but it was never checked out. It went to the other library, was circulated there and came back but it is still they system as in transit to the other library. Depending upon how some of the other setting went on .... The different barcodes, I am not sure what interface you looking at, so if you want to provide a clarification whether you are talking about the different barcode showing up in SRCS on the request or showing up in your ILS. I'd appreciate that, and we can come back to the other half of your question.

A: Might the branch setting the state library has turned off be affecting the following issue we are having: customers who have a home library branch that is not the ILL receiving library are not allowing us to receive shipped items in SRCS & keep throwing an error message.
Q: Katheryn I know you are with TLC, but we ran into this in Evergreen as well. Yes, this it requires additional customization of your NCIP codes. Because, right now, as far as the base configuration is concerned, it only sees your system level. It cannot parse past that. It is frustrating, but my understanding is the TLC and Auto-Graphics are supposed to be working on this issue right now.

Q: We have a request that is showing the due date is 10/12/16, but it is showing up as Overdue in the History Information. Why?
A: I have no clue, but if I can ask you to email me that Request number, I will do some research and get back with you.

Q: What is the status of the bug that causes the Title value for a request to not be pulled into the Received email template, is there a firm ETA for a fix?
A: That is one that is on the enhancement panel. Hopefully they will fix it by the end of the year. I thought that they had a fix for it recently, but that was for a different template. That is one they are aware of. They are also looking at giving some added customization to those notices in the future.

Q: This going back to the disappearing requests.   They are a TLC Library and they pull their pick list daily and still have items disappearing. So it is probably not an expiration issue.
A: Send me a couple of the request numbers and explain what is happening and I will forward it to Auto-Graphics for troubleshooting.

Q: Is there any way to look at the Patron's record in SRCS? For example, I wanted to look up my information, but I can't see it anywhere.
A: I am assuming that you are an NCIP library, so your patron records are in your ILS. You will need authorization to view them in your ILS to look at it.

Q: Another TLC library -- we have requested other libraries to request our DVDs, but none will go through. We checked our lending defaults and they are correct
A;   I just heard a challenge thrown down for everybody listening. I have no idea if you have all of the lending parameters set correctly, and they are in a lendable collection, I would not see why anybody could not file a request for them. Do the TLC libraries currently allow cross system DVD lending? That may be affecting it if your internal circ rules are preventing it. The NCIP library are governed by their circ rules.

Q: (The barcode) is showing in SRCS and not in Evergreen.
A;   The reason you are probably seeing a different barcode in SRCS is that the request has moved on and another library also supplied a copy. That was for Tamara. I will admit that we have seen in the last month. It is another one that I am treating as a teething pain of a new system. It is getting lass and let frequent.

Q: Going back to patron record. How do non-NCIP libraries view the patron record?
A: They have to be authorized to the User Administration. I am logged in at a higher level, but there is an Edit User Record. And you can go in I am to look at George. This is where I can go in change a password or change any of the information.

Q: Would you mind showing them how to force a request to a specific library? They are trying to figure out how to specifically request materials from a TLC systems. Right now TLC libraries have not been lending DVDs within their system.
A: That is probably one of the issues. For your question for sending a request to a specific library, take a dead or canceled, a retry request – change to Approved – Send, type in your library codes and hit Submit and 90% of the time that should do it. There is an added override code, but if you are working with an NCIP library at either end, that override code does not work. So I am not going to show it here.

A TLC library reports that they do lend DVDs to other Indiana libraries and they had to set their preferences to allow this to happen.

We would like to ask people how has this system been received overall? By your patrons, by your staff?

Q: Do I still need to print out the bookstrap in SRCS if I print a receipt for the patron through EI?
A: That is a local option. As I said earlier, the bookstraps are strictly optional. They contain some useful information, but if it doesn't help your local workflow, there is no reason to do it. It it does help your workflow, then use them.

Q: What are the perks of having a preferred borrower list?
A: The reason to have this list is to improve serviced. Everybody has a list of favored lenders that they always go to when they need something. You want always put those in your preferred list. You also want to consider using the ones located in the same courier hub. For instance, if the Berne Library borrows something from Allen Co, it is going to get there much faster than is it comes from the University of Southern Indiana. Think geographically. Think service wise. And put the ones in there that you know you will get the best service from. But them in your preferred list. It can be very long or very short. Each one is going to be a little different.

Q: Can you explain the Not Responded to stat under Lender's Statistics? Does that mean a request that we have ignored, because we are looking every day?
A: The Not Responding status technically means that it got ignored and timed off. I will have to dig in a little deeper to see if it is triggered by anything else. You might go ahead and look at the log on the long display and see when it timed off. It is possible that you got a request before you really started checking. We have had a couple of libraries that didn't start checking the pending file until a day or two after we went live and missed some requests. And there are the left over requests from earlier in August. Yes, that is true. Anna just brought up a good point. We have cleaned out all of the test results, but there are some requests placed between August 1 and August 14 that we cannot erase because of the way that table is compiled. So we are always going to be saddled with those. So if you are downloading statistics, I recommend that you start on August 15th. There are going to be some added, call it padding, in there. That is a very good likelihood that they will be in there from between the time you ended testing and we went live.

Q: Is there a "how to use" info for our patrons?
A: Not yet. We have a couple drafts being kicked around. There is a nice PDF document from Auto-Graphics provides that sort of does that. We have been dickering with it but I'm not satisfied with it yet. We are trying to get something together. We have libraries who have something that they are willing to share. If you have something, please send us a copy of share it with the listserv.

Q: An item that generated a transit slip and was not addressed within time allowed will now not check back in. What should I do to be able to check it back in?

A: Cathy – this is the same problem that I was talking about a minute ago, where the hold is still trying to capture the hold. If you will contact me (Anna) I will show you how to kill the hold in Evergreen.

Comment: Someone is commenting that having the shipping label is very useful.

Q: We would like to have access to view ILLs we received at some point even once they are no longer under our Manage Lender Requests list, searching by ILL# or title as the other searching already in SRCS. Is this an option available at a global setting turned off at a state level? It would help us immensely, especially when you need info to track issues.
A: So you want to be able to search for ILLs by something other than ILL number? To my knowledge, [that is] the only global search available to us now. You can only search by title while it is in your bailiwick. You can do a complete search by patron, but I am not sure how far that goes. So right now I am going to say no, but I will look into it.

Q: How long do ILL requests stay in SRCS?
A: Once a request is canceled, it stays for. Oh, I was just having this conversation. I'm drawing a black. The retention period is 30 days, but we set it to keep them for about 60 days then they are purged, except for the statistics.

Comment: A library observes that they have been putting stickers on the books to identify them.

Q: Wells County is excited about their SIRSI – NCIP connection. They want to know next steps to get it up and running.
A: For the next step you want to get in touch with Ruth Castillo at Auto-Graphics. If you want to email me, I will put you in touch with her.

Q: Not being able to search older ILLs is a problem, when they have issues arising with holds. Particularly when they need to reference the number.
A: I will see if there is any way we can keep those longer and added ways to search them. I think that there is a setting where we can keep them longer. I am not sure about the searching.

Comment: Fairmount PL is really excited about loaning materials for first time!

Thank you all for attending our first SRCS experimental town hall meeting. We will probably have others as we move forward. We will definitely have something similar as we move into Phase II. We will be opening the window more libraries to join SRCS. It opens on December 1 and closes on January 30th. I am assuming setup time to bring them into the catalog will go much faster, now that we have an idea of what we are doing.

I want to thank you for your time this morning. I want to thank Anna and Wendy was here copiously taking notes.