

**NEOS Access Services Committee Meeting**  
**January 30, 2014**  
**Professors Emeriti Room, U of A**  
**Minutes**

Present: Karen Hildebrandt (Concordia), Nick Ursulak (MacEwan), Rhonda Dawson (AGL), Donna Gordon (AHS), Lilla Lesko (UofA), Peggy Morgan (U of A BITS), Anne Carr-Wiggin (NEOS), Bonita Bjornson (King's), Eve Poirier (NorQuest), Lucy Heintz (AITF), Roger Salus (Covenant Health), Laura Lemmens (AGL)

Teleconferencing: Cathy Hendry (GPRC), Corinne Hope (Keyano), Laura Somerville (Lakeland), Peggy McKenzie (Olds), Barbara Mahoney (RDC), Wilmer Tenerife (CUC)

1. Bonita called the meeting to order at 9:31 am and welcomed all attending.
2. Approval of the October 10, 2013 Meeting Minutes.
3. Director's Station workspace – Eve discussed the Director's Station Wiki and that she and Don put together. Currently 30 people have signed up. Email Eve at [eve.poirier@norquest.ca](mailto:eve.poirier@norquest.ca)
4. Changing locations – In response to a question, Peggy Morgan explained that if libraries change the location of items and use any of the existing locations within the ILS, it would not affect the Circ map. Circ maps/rules depend on User profile, owning library and item type. Some locations are holdable and others are not, so staff should determine how a change in location might affect holds. Questions about changing location can be sent to Sharon Marshall (Cataloguing).
5. Three Renewals for Secondary Clients – Anne Carr-Wiggin brought forward the request from Directors that we change from the standard two renewals for secondary clients with the third manual renewal on request to three standard renewals. It was noted that some libraries that only give primary clients two renewals. Peggy will need to work with every library's circ map so it will take time to complete this project. Peggy will talk to Sandra about sending out individual libraries' circ maps. This will go back to the Directors for final policy approval.
6. Handling undeliverable email notices – Peggy Morgan  
UA BITS has been investigating making changes to the way undeliverable email notices are handled so that these can be handled in a timelier manner.

Currently, undeliverable recall notices are forwarded daily to the user's library. Undeliverable bills notices are forwarded annually (in November). All other undeliverable email notices (e.g. headsup and overdue notices) are deleted.

With Google Mail, BITS is able to add filtering rules which would automatically forward undeliverable mail to the user's library. This would mean that libraries could handle their own undeliverable notices daily. For undeliverable recall notices, this would mean following each library's current in-house process. For all other undeliverable notices, this would mean deleting the email address in the user's record.

For most libraries, there may only be a handful of returned emails to handle on a regular basis (more when the monthly bills notice report runs). Once libraries remove problem email addresses that appear in their bills notices, the number of undeliverable bills notices would drop significantly.

UA library staff would continue to be responsible for handling/forwarding all replied-to emails and fines appeals.

Peggy asked for 3 libraries to volunteer to be test libraries. King's, Concordia and AHS will test the process.

7. Remove items with bills enhancement – Peggy Morgan described this enhancement that allows deleting of items with bills attached (see Appendix 1).
8. External Clients – The group reviewed the policy on External Clients from the Policy on Sharing Materials, as some members had had questions.
9. New Magnetic Media Item Type  
A new item type, MAG\_MEDIA has been created to be assigned to items which are or have magnetic media (e.g. VHS tapes, audio tapes, kits). Magnetic media items are damaged if checked out on a self check machine, so this item type will not be self-checkable. This enables other media types such as DVDs and CDs to be made self checkable and able to be checked out on self check machines.

If all libraries have their magnetic media items changed to MAG\_MEDIA this means that if these items are requested by a client at a library that has self check machines they will not be self checkable. Admittedly, most magnetic media items are not heavily used, but we'll have to work out a practice for when they are.

The alternative if all libraries don't change is that when a magnetic media item is received at a library with a self check machine, a means will have to be found to change it to MAG\_MEDIA and then back when it is returned to the owning library. Most Circulation WorkFlows profiles don't have the ability to do that, so libraries would have to work out a way to make that change. Then staff at the desk checking out the item would have to do an override to compensate for the fact that the owning library's circ map would not include this item type, and would need to manually enter the due date.

At the last NEOS Technical Service meeting, libraries were asked to review how they handle magnetic media and to let Sharon Marshall know what changes they want made. This would be done at no charge. The Access Services group discussed how this would affect practices when libraries were receiving holds from other libraries.

10. Marking items lost or missing (guide attached as appendix 2). Peggy reviewed the very important distinctions between Lost, Missing, Claims Returned, Discard etc. This guide is included below and Access Committee members should ensure that public service and access service staff in their libraries are aware of these differences and they are incorporated into procedures.

11. NEOS Miniconference – June 6. Looking for submissions from the Access services committee. Eve suggested: Circ trends over the last 20 years; what libraries are doing universally for patron needs? How do we define ourselves as a consortium based on physical collections in a digital era?
12. Adding Wording on Date Due Receipt Slips. It was decided to add wording to date due slips  
“Items may be recalled and loan period shortened if required by others.”
13. Meeting adjourned at 11:15 am.

Next meeting TBA

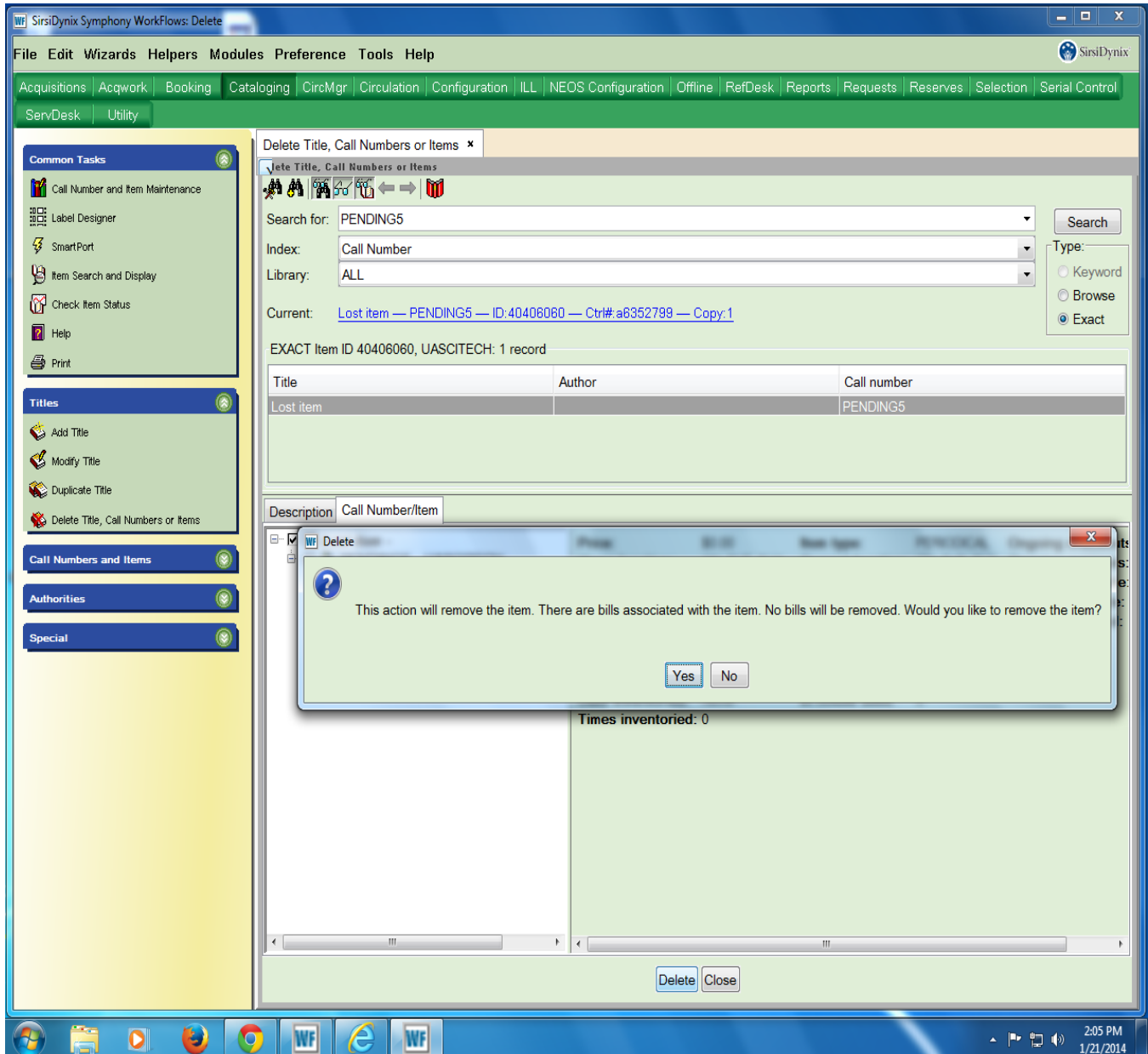
## Appendix 1

### Delete items with bills

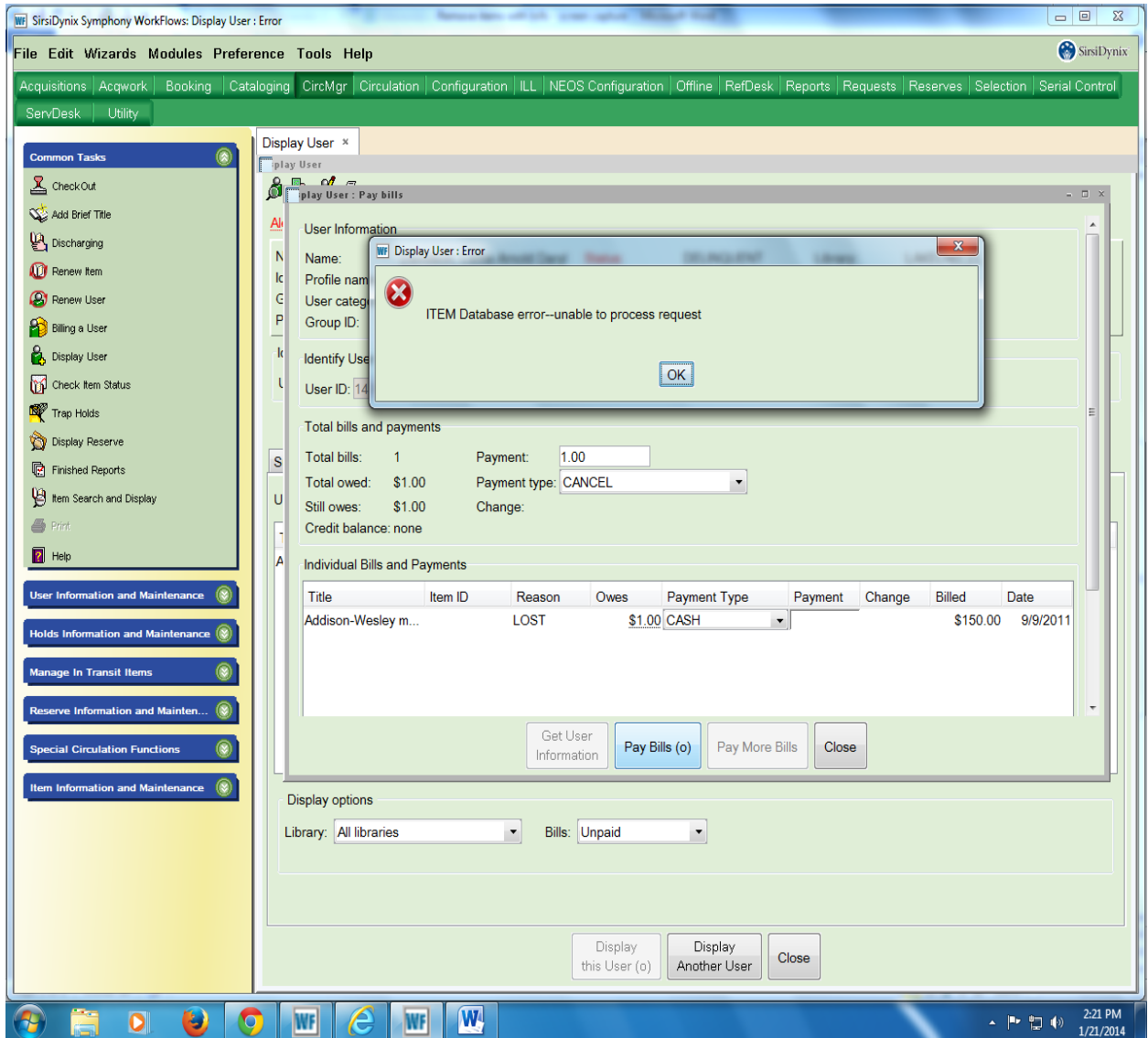
This is a new enhancement with Service Pack 3. It is currently turned on.

A behavior can be enabled in the Delete Title, Call Numbers or Items wizard that would prompt before deleting items with bills.

An information message would then display before items with bills were deleted. This would enable staff to decide whether to 1) cancel the bill first, 2) not remove the item, or 3) continue with the deletion.



This is the error message that displays when paying a manually added lost bill from an item that has been removed from the database. Note the lack of item id in the bill record.



## **Appendix 2: The Missing User Account (aka the Missing User)**

The Missing User account is a default, delivered, system-wide account associated with library AGINTERNET. All items marked missing system-wide appear in the checkouts folder of this account.

When items are marked MISSING using the Mark Item Missing wizard:

- the current location of the item changes to MISSING and the item is shadowed in the online catalogue. The home location does not change.
- the items appear in the Checkouts folder of the MISSING account
- the assigned loan period is NEVER
- overdue bills and lost book charges are not added
- discharging the item removes the MISSING status. The current location reverts to the item's home location. It takes an overnight process for the item to appear in the online catalogue again.
- MISSING items appear on the daily, monthly and yearly missing lists. If they haven't been found after two years, they will be marked DISCARD (i.e. items are discharged from the MISSING user and the current location is changed to DISCARD) as part of the two year missing process and removed from the system.

Keep in mind:

- if the Edit Item wizard is used to mark an item missing, both the home and current locations of the item change to MISSING. The item does not appear in the MISSING user's checkout folder. Discharging the item does not remove the MISSING status and it remains shadowed in the catalogue. Staff must use the Edit Item wizard to change the home location to the original location.
- reserve items cannot be marked MISSING user the Mark Item Missing wizard. To mark reserve items missing, remove the items from reserve first and then mark them missing.
- items should not be checked out to the MISSING user using the checkout wizard.
- the system has been configured so that items cannot be checked out to two users at the same time. If an overdue, assumed lost, claims lost, or claims returned item is marked MISSING, it is automatically discharged from the previous user's account.

Word of Caution:

- there are currently 655 items checked out to the MISSING account that have also subsequently been marked Claims Lost (using the Marked Item Lost wizard). If missing items are marked claims lost, cancel the \$150 lost book charge at the time the item is marked claims lost or these will appear as bills on the MISSING account. Note: There is no link between Claims Lost items and the previous users.

### **Cancelled Holds Procedure**

When marking an item MISSING (e.g. if an item can't be found when processing the List Onshelf Items report), check to see whether there are other holdable copies in the system that will fill the hold. If no other holdable copies exist, cancel the hold. This will generate a cancelled hold notice informing the user that the hold has been removed.

### **The Difference between MISSING and Claims Returned**

Marking a checked out item MISSING discharges it from the original user and checks it out to the MISSING user. The link between the item and the previous user is broken. If the item is ever returned, the user will not be fined.

Marking an item Claims Returned keeps the item in the user's checkout folder and therefore maintains the link between the item and the user. Depending on the date used when marking the item claims returned, the user may still be fined if the item is returned.

Whether a user is billed for a Claims Returned items depends on the claims returned date:

- if a claims returned date is on or before the item's original due date, the user is not billed.
- if a claims returned date is after the item's due date, fines are calculated on the days overdue up to and including the claims returned date and the user is billed.
- if the claims returned item is marked as LOST, the user is billed for the lost item.

### **The Difference between MISSING and ASSUMED LOST**

MISSING items are checked out to the MISSING user. MISSING items do not accrue overdue bills or lost book charges, and are never assigned an assumed lost status.

Assumed lost items are checked out to users and are 31 days overdue. The system automatically assigns an assumed lost status and adds a lost book charge of \$150 to the user's bills folder:

- these items remain in the user's checkout folder
- if an assumed lost item is discharged, the lost book charge of \$150 is removed from the user's bills folder and an overdue bill is added instead (assuming the user is fineable)
- if an assumed lost item is marked MISSING, the item is discharged from the original user's account and checked out to the MISSING User's account. The link to the previous user is broken. The item's status changes to MISSING

### **The Difference between MISSING and DISCARD**

MISSING items appear on the daily, monthly and yearly missing lists. If they haven't been found after two years, they are automatically marked DISCARD (i.e. items are discharged from the MISSING user and the current location is changed to DISCARD) as part of the two year missing process and removed from the system.

Items marked DISCARD (i.e. the home location has been changed to DISCARD) are removed from the system monthly by the Rem Discard report. (Note: If a checked out item has had its home location changed to DISCARD, the item will be shadowed in the online catalogue but it will not be removed from the system. This is because the monthly Remove Discard report has been configured so that it does not select DISCARD items with outstanding checkouts, bills or holds).

### **Missing Lists**

The Daily, Monthly and Yearly missing lists include all items with a current location of LOST, LOST-ASSUM, LOST-CLAIM, LOST-PAID, or MISSING. The March Discard report scheduled as part of the two year missing process changes the current locations of these items to DISCARD. Items with outstanding checkouts, bills, or copy level holds are not changed to DISCARD.