

MID-HUDSON LIBRARY SYSTEM
Resource Sharing Advisory Committee Meeting

Date:

Location:

Committee members attending:

- ☒ Tammy Gaskell (Columbia)
- ☒ Wendy Tremper Wollerton (Columbia)
- ☒ Carol Bancroft (Dutchess)
- ☒ Rhiannon Leo-Jameson (Dutchess)
- ☐ Kimberly Benjamin (Greene)

- ☐ VACANT (Greene)
- ☒ Jeanne Buck (Putnam)
- ☐ Deirdre Farabaugh (Putnam)
- ☒ Darren Lanspery (Ulster)
- ☐ Gillian Murphy (Ulster)

Staff Attending: Laurie Shedrick (MHLS), Rebekkah Smith Aldrich (MHLS)

Guests: Maureen Garcia (Mt. Top Library)

Minutes from 10/25 meeting reviewed and approved by Tammy Gaskell, seconded by Jeanne Buck

10:05 Call to order

Discussion Items:

1. Review Committee Charge and Orientation to the Committees

Charge: The Resource Sharing Advisory Committee is charged to establish best practices and procedures related to the sharing of resources among libraries and to recommend relevant policies to the Directors' Association.

- Address concerns submitted by member libraries pertaining to resources sharing among libraries
- Review and propose edits to the Resource Sharing Standards
- Review Resource Sharing policies, procedure, and practices related to the shared ILS

2. Alternative P-type, Request for a pilot program by Kingston Library

The committee reviewed the potential for creating an alternative range for ptypes that could be used by libraries to create alternative service levels within their service area. The committee considered the case use presented by Kingston Library to create a limited card for students, though other possible uses for limiting and even expanding service levels were recognized.

The committee recommended reserving the range for potential use in the ptype table and creating an example for Kingston (PTYPE 140 Kingston Limited) to be used as a pilot to review the processes and policies that may become apparent with the pilot.

Committee recommendation: Kingston Library create a pilot program to test the use case for the additional ptype before being open to all members.

3. Access to ILS Logins

The committee reviewed the current policy under Management & Reports in Resource Sharing Standards. The committee recommends the following revisions as an Action Item for the Directors Association February 6th meeting.

Action Item Name: Update to Resource Sharing Standards: Management & Reports, section 1

Background: A clarification of access to logins for the ILS. The committee reviews the RS standards regularly and moved this section up to respond to the request.

Issue: The Management & Reports, section 1 of the Resource Sharing Standards, currently titled "Updating

passwords” was reviewed by the Resource Sharing Committee and found to be in need of wording updates. The section has expanded over years to include items outside of the scope of the section title. As part of the review the committee reorganized the order of the elements and updated the language for clarity and purpose.

Action: The committee recommends the following changes to the Management & Reports, section 1, previously called “Updating Passwords”.

Proposed Language

Management & Reports

1. Managing ILS user access

- a. Directors or their designees are the only people who can request new user accounts or edits to current user accounts in the shared ILS and related platforms. A designee may be identified by the Director in writing to the Technology Operations Manager of MHLS.
- b. Sierra passwords need to be changed regularly, at least every six months
- c. Logins shall be removed when you have had a staff member leave your employment.
- d. Logins will begin with the library 3 letter code.
- e. Each library will maintain at least 3 sets of initials and passwords for ILS. The logins will have staggered levels of authority. A higher level will include the ability to override renewals and claim items returned. Only directors or those designated by the director may have access to this level. *~Amendment approved by Directors Association 12/7/07*
- f. Each Sierra user should have an individual username and password. *~Amendment approved by Directors Association 8/7/12.*
- g. Group Logins may only have such permissions as designated and periodically reviewed by the Resource Sharing Committee and viewed in [Appendix A](#). *~Amendment approved by Directors Association 9/10/14. Reviewed 1/27/22*
- h. Group login passwords are changed upon the departure of any individual with access to the login. *~Amendment approved by Directors Association 9/10/14.*
- i. Any change to the ILS that facilitates rapid and effective switching of users shall prompt the immediate discontinuation of group logins. *~Amendment approved by Directors Association 9/10/14.*
- j. Any loss, damage or issue arising from access to the ILS and related platforms, shall be the liability of the library. *~Amendment approved by Directors Association 9/10/14.*

5. Cost-per-circ items

The Committee Reviewed Copies to Holds Recommended Purchasing Policy in RSS and considered how it might apply to OverDrive.

- Are 4-7 holds are rarely met by many libraries (physical and e)?
- Price higher on ebook and e audio
- Caps on limits and circs may influence purchasing (or not)
- Cost per circ- used for back orders, high demand.
- First copy not cpc? Great for book groups

Further discussion tabled to next meeting

4. Removal of GMD subfields

Committee discussed the recommendation submitted by MHLS cataloging to remove GMD Subfields from all records and discontinue them for future use.

Action Item Name: Discontinuation of GMD (General Material Designation) in MHLS catalog records

Background: RDA (Resource Description and Access) is the current cataloging standard, and has been for over a decade. This standard no longer includes the GMD terms such as [videorecording], [sound recording], [realia], etc. within the main title field.

Issue: The GMD terms are legacy remnants that are no longer relevant withing our catalog. In cases like

electronic resource, it creates ambiguity with what we now consider eResources to be.

Proposed Action: MHLS catalogers should Remove all instances of GMD terms in existing records, including [videorecording], [sound recording], [electronic resource], [kit], [realia], [cartographic material], [microform], [vertical file], [braille], & [picture]. MHLS Cataloging staff should not include GMD terms in any new records cataloged going forward.

5. Bib Records for Paperback Titles

The committee discussed the idea of expanding material and itypes to include paperbacks in some way for Adult, Juvenile and young adult collections. This would be possible only for records going forward, not previous items cataloged because there is not a clear path to separating what had been previously merged. The committee will take this idea back to each county to determine if there is a desire to create new material types or itypes for paperbacks.

6. Vega Review:

Below are some significant changes that have taken place since our last Directors Association meeting.

- **Record Rollup improvements**
- **Record display tweaks**
- **Relevancy that works:**

MHLS ILS Road Map 3.0 (Vega Discover and Connect) as it stands today:

1. Phase 1 of Pilot: Launch, Configure, review – *in progress*

Test site launched; MHLS Technology Operations team managing ongoing weekly meetings with Innovative to:

- a. Review record display and integrity by providing vetted problems with examples
- b. Implement and review biweekly software updates (bug fixes and enhancements)
- c. Review feedback- recreate and examine for duplication- report to Innovative

2. Phase 2 of Pilot: Expand review to 1 library – *in progress*

Poughkeepsie Public Library District (PPLD) staff and patron promotion to review the test site for feedback:

- a. PPLD staff met with MHLS TechOps for orientation and received documentation
- b. PPLD staff evaluations submitted via online form
- c. PPLD promoted a sneak peek to the public
- d. Patrons were asked to provide feedback via online form
- e. Feedback converted to a report to Innovative

3. Phase 3 of Pilot: Expand review to 5 libraries – *Coming very soon!*

- a. Libraries will meet online for orientation
- b. Commit to promoting access to patrons from the website, through media, provide feedback.

7. Other: Syndetics display in Encore

R. Leo asked about the status of the issue around promotion of “e” titles in the Syndetics catalog enhancement display where all or most titles were records from e collections. This feature had been introduced by Syndetics and turned on during pandemic closures. Toggling off was not working in our Syndetics admin platform. Laurie will check on the open issue with Syndetics.

12:00 Adjourn 12:05, motion by Tammy, seconded by Jeanne

Next Meeting: Thursday, March 10, 2022

To include in DA Business Meeting Agenda Attachment as an Action Item:

- **Title:** Update to Resource Sharing Standards: Management & Reports, section 1
- **Background:** A clarification of access to logins for the ILS. The committee reviews the RS standards regularly and moved this section up to respond to the request.
- **Issue:** The Management & Reports, section 1 of the Resource Sharing Standards, currently titled "Updating passwords" was reviewed by the resource sharing committee and found to be in need of wording updates. The section has expanded over years to include items outside of the scope of the section title. As part of the review and, the committee reorganized the order of the elements and updated the language for clarity and purpose.
Recommendation: The committee recommends the following changes to the Management & Reports, section 1, previously called "Updating Passwords".
- **Status:** Discussed at the January 27 meeting of the RSAC

Proposed Language :

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- **Recommendation:** MHLS catalogers should Remove all instances of GMD terms in existing records, including [videorecording], [sound recording], [electronic resource], [kit], [realia], [cartographic material], [microform], [vertical file], [braille], & [picture]. MHLS Cataloging staff should not include GMD terms in any new records cataloged going forward.
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