

# **Policies of the Library Connection Consortium**

Common Practices for  
All Member Libraries

**As of June 12, 2015**

(Exceptions for Academic Libraries Noted Where Appropriate)

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## **Cataloging Records for Electronic Materials**

Approved February 6, 2015

On recommendation of the User Experience and Bibliographic Services committees:

- Removing the item availability information on the Encore search results page that only shows availability for the first library alphabetically
- Changing the “see all” link to read “check availability”
- For “downloadable materials” locations, using just the town name instead of the full library name for the location name
- Putting Call Number in a separate column from Location
- Setting the call numbers to be in the format [Vendor][Format] for electronic resources, such as Zinio Magazine or OverDrive Audiobook
- Adding the URL to the “check availability” popup

## **Cataloging Serials**

Approved October 10, 2014

The Serials Task Force announced that it had determined that the four serials codes should be set up as:

- 1) Frequency
- 2) Gift, direct order, standing order, Zinio, or Flipster
- 3) Subject headings
- 4) Suppression and retention codes

They also announced that “No consensus has been reached on standard terminology for library holdings fields.”

## **Circulation History Limited to One Previous Patron**

Adopted July 18, 2014

“The Circulation Roundtable requested that we store the three previous patrons who checked out a particular item, rather than just one as we are doing now. Discussion of this request focused on the additional liability this would create, on how we would have to respond

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to legal requests, and how not keeping patron data had been beneficial in the past. A motion was made not to increase the patron history on items to three patrons (Chase/Karim). All voted in favor and the motion carried.”

## **Circulation Transaction History Retained 12 Weeks**

Approved by the Board June 12, 2015

The Board approved extending the retention period for transaction data from two weeks to twelve weeks. This will enable SQL reports to capture data needed for the annual State Library Report every month by each library. The 12 weeks are needed to allow libraries a one month grace period to realize they overlooked collecting last month’s data or to question serious anomalies between the current month’s and previous month’s data. The requirement that no data be surrendered without patron permission or a court order remains strictly in force.

## **Collection Sharing Policies**

Approved December 5, 2014

On recommendation of the Resource Sharing Task Force. The specific policies are listed in a separate section of this document titled “Resource Sharing Standards for Public Libraries”.

## **Encore Timeout of 5 Minutes**

Adopted June 13, 2014

The Board set the Encore timeout to five minutes to insure in-library OPACs would time out and protect patron data after five minutes. The Board recognized this is a global setting and will affect remote users. The issue could be revisited if a significant number of home users complain.

## **Help Desk, Reporting Issues**

Announced to the Board June 13, 2014

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The Executive Director “pointed out that LCI staff does not respond to issues discussed on the listservs on the assumption those are requests for peer responses. Any issue that library staff would like LCI staff to address should be emailed to [support@libraryconnection.info](mailto:support@libraryconnection.info).”

### **Linked Patron Functionality Turned on**

Approved February 6, 2015

The Board also requested the Circulation Committee to develop recommendations for implementation policies for linked patron functionality.

Modified April 10, 2015

The Board approved allowing individual libraries to opt out of offering to link patron accounts. Libraries wishing to do so have to request the opt out from Library Connection staff.

### **Search History in Encore Turned Off**

Approved December 5, 2014

On recommendation by User Experience Task Force due to privacy concerns with in-library searching.

## **Resource Sharing Standards**

### 1. General

All books, DVDs, Blu-Rays, audiobooks and CDs must be holdable, excluding special collections (see Standard 9) or additional copies as defined in Standard 5. The title and item paging lists must be pulled and routed in their entirety at least once a day.

### 2. Title and Item Level Holds

Libraries should use title level holds (hold copy returned soonest) and not item level holds for faster service, excluding those with volumes.

### 3. Limits on System Holds

In the OPAC, the patron is limited to placing 50 holds. A library staff member can override this on a case by case basis.

### 4. Awaiting Pickup

All items remain in "awaiting pickup" status for no longer than 7 business days (open days for individual library), excluding special collections (see #9).

### 5. Copies to Holds Recommended Purchasing

Libraries should own 1 globally holdable copy for each 4-7 holds; 2 globally holdable copies for 8-14; 3 globally holdable copies for 15-23 holds to be picked up at their location. These minimum purchases also apply to audiovisual material. In the case of DVDs, holds are considered by title, not format (Blu-ray, widescreen or full screen).

The holdability of additional copies is at the discretion of the library. LCI will provide the following three additional item types to allow for differing loan rules on these copies:

BOOK – ADDITIONAL COPY

DVD – ADDITIONAL COPY

BLU-RAY – ADDITIONAL COPY

Items added to the catalog as Local Holds must be identified in the call number field. (i.e. – Local Holds Only)

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Approved by the Board December 5, 2014

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6. Rerouting Holds After Put in Transit

Items that are in transit to fill a hold cannot be rerouted.

7. Multiple Holds on Bib Record

Only one title level hold can be placed by or for a patron on any single bibliographic record unless that patron is administering a book discussion. For book discussions, the override option can be used.

8. Missing Paged Item

If an item is missing from your collection and it has a checked-in status, change the item status to missing within 36 hours, so the catalog status display will more accurately reflect its status and the item will no longer be eligible to fill a system hold. Once found and checked in, the status will change automatically from missing. If the material is not found, it is a local decision on when to manually move this item's status from missing to discard.

9. Special Collections

Special collections or realia, such as Rapid Reads (i.e. Fast Track, or equivalent), e-readers, equipment, museum passes and backpack collections may be excluded from the holds system; and the checkout and check-in of said items be done only at the owning library. Pilot or experimental collections may be non-requestable for a period of six months.

10. Outstanding Holds

Libraries should view and track their holds regularly using the View Outstanding Holds function to ensure holds are being filled and patrons are receiving items in a timely manner.

11. Missed Holds

Missed hold reports should be run by each library on a periodic basis to ensure holds for items owned by a single library are filled.