

# **Policies of the Library Connection Consortium**

Common Practices for  
All Member Libraries

**As of January 11, 2019**

(Exceptions for Academic Libraries Noted Where Appropriate)

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## **Cataloging DVDs and Blu-rays with multiple disks**

Approved April 21, 2017

Cataloging and hold-mediation procedures for multi-disc DVDs and Blu-rays and good practices for identifying and fixing problematic holds were adopted

## **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

On motions made after considering the User Experience and Bibliographic Services Committee recommendations:

- URLs for electronic materials will be maintained in item records, not bibliographic records
- LCI staff will catalog shared electronic resources, but library staff are responsible for cataloging electronic resources available only to patrons of their respective libraries

## **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

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- 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 Set to Two Previous Patrons**

Adopted July 8, 2016

After noting that our current SQL setup maintains a 12-week circulation history, which allows previous borrowers to be untraceable after this time period, the Board voted to set Sierra to store the previous two borrowers. This replaced the policy of limiting circulation history to one previous patron which was set by the board on July 18, 2014.

### **Circulation Renewal Due Dates Based on Original Due Date**

Adopted April 20, 2018

Renewal due date calculations will now be based on the original due date instead of the renewal date.

### **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”.

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## **E-book Integration in Encore Enabled**

Approved November 13, 2015

Based on a recommendation of the UX Committee, e-book integration in Encore was turned on.

## **Encore Timeout of 5 Minutes**

Adopted June 12, 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

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 [helpdesk@libraryconnection.info](mailto:helpdesk@libraryconnection.info)."

## **Hold Information in Encore Search Results**

Approved July 10, 2015

The Board voted to retain hold information in Encore search results. The vote was eleven in favor to eight opposed, with five abstentions.

## **In-Transit-Too-Long Message Disabled**

Approved September 11, 2015

This feature is supposed to help track items that have become lost in the transit system and to allow holds trapped by those items to be filled by other copies. Since turning this on, we have discovered that items sometimes enter this status too early or never at all. Innovative has been unable to explain why this is happening or commit to when it will be fixed.

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### **Item Type Rationalization: Fiction and non-Fiction**

Approved April 15, 2016

Upon recommendation of the Item Type Reduction Task Force, the board voted to rationalize most item types into Fiction and non-Fiction, with sub divisions for sub categories (e.g. YA).

### **Job Postings on LCI Listservs Allowed**

By Board Consensus November 13, 2015

The Board felt there was appropriate for member libraries to post their position openings on Library Connection's listservs.

### **LCI Borrowing Policy: Wireless Barcode Scanner**

Approved October 12, 2018

The board approved the Wireless Barcode Scanner Policy appended to a separate section of this document titled: Wireless Barcode Scanner Borrowing Policy.

### **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.

### **Mobile Device Training for Patrons**

Approved December 10, 2018



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LCI training for patrons on how to access OverDrive is being replaced by training for patrons on useful apps for mobile devices, as OverDrive has become more intuitive to use. To discourage libraries from using LCI staff as free program providers, the board voted to allow a free mobile app training session for every library each year, but to charge \$100 for additional sessions each year. The amount of the fee can be adjusted over time by the LCI Executive Director without additional board approval. Training for member library staff remains free.

### **OCCL Records Preferred to Sky River**

Bib Services Committee recommended to Board February 12, 2016

### **Patron Online Registration**

Denied February 12, 2016

The Board voted (21/1) not to enable patrons to register online with accounts limited to placing holds.

Enabled January 13, 2017

The board voted to enable patron self-registration for each library desiring it. Self-registration would allow patrons to place holds and use some e-resources (depending on the validation method). Self-registered accounts will be deleted by LCI staff if not updated within 30 days.

### **Patron PINS**

Approved December 10, 2018

The Board voted to replace patron logins to Encore with patron name and library card number with patron library card number and patron PIN. The latest version of Encore enables this feature to be turned on and require all patrons to create a PIN the next time they log into their account. PINS can be changed by patrons in My Account, via a "forgot my password" email feature, or by staff in Sierra. LCI will enable this feature around February 4-5, 2019.

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## **Patron Photographs Enabled in Patron Accounts**

Approved February 12, 2016

Libraries that wish to do so can take pictures of their patrons. These would be visible when the accounts were used in Sierra, so staff could verify patron identities. Libraries not wishing to use this feature can have it turned off.

## **Patron Purging**

Approved October 9, 2015

Patrons whose library cards have expired over two years ago and who have had no circulation activity in the past two years will be purged annually. Patrons with checkouts, holds, or who owe money will not be purged. Patron notes will normally be ignored for this purge.

## **Patron Simultaneous Hold Limits**

Limit Reduced to Five April 15, 2016

Voted by the Board as a method for reducing transit volume in the face of deliverIT CTs curtailed service.

Limit increased to 50 June 29, 2017

Effective date of change July 17, 2017

## **PCI DSS Compliance**

Approved January 13, 2017

The PCI DSS Compliance Policy was approved to allow member libraries to accept credit card payments through Encore at their library if staff refrained from handling the credit card or entering credit card information on behalf of patrons.

Updated March 10, 2017

Updated to reflect ADA compliance. Library staff are allowed to help disabled patrons who need assistance, but only if those patrons request it.

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**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.

**SMS Messaging Turned on for Hold Pick-Up Notices**

Approved October 9, 2015

To make SMS messaging work properly, messages will include a URL that will send a patron to the full version of her account in WebPac. Doing anything after that will send the patron back to Encore.

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Resource Sharing Standards for Public Libraries  
Approved by the Board December 5, 2014  
Reaffirmed in full by the Board February 12, 2016  
Later Modifications as Noted

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## **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. Superseded by the Board's vote on April 15, 2016 to temporarily limit patrons to 5 simultaneous holds in order to accommodate the limitations of deliverIT CT.

### 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). (See also #12 on limitations of items placed in transit).

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

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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)

6. Rerouting Holds After Put in Transit

Items that are in transit to fill a hold cannot be rerouted. Modified by the Board's vote on July 8, 2016 that all new items must be placed in transit to the owning library, irrespective of any holds that the item could fill.

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.

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Resource Sharing Standards for Public Libraries  
Approved by the Board December 5, 2014  
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Later Modifications as Noted

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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.

12. Limitations on Items Eligible for Transit to Fill Holds

The board acknowledged that the initial response to deliverIT CT's curtailed service forced libraries to stop filling holds requiring the transit of new materials and DVDs, but the current level of service seemed to have some slack. The Board therefore voted on July 8, 2016 that member libraries should again allow non-new DVDs to fill holds requiring transit to other libraries.

13. OverDrive Materials

The board voted to increase the OverDrive checkout limit to 10 on September 9, 2016. The OverDrive hold limit was raised to 10 on October 14, 2016. The board voted to allow libraries to elect to automatically share their Advantage items that are one-year old and have no holds on October 14, 2016.

Library Connection, Inc.  
Wireless Barcode Scanner Borrowing Policy  
Approved by the Board October 12, 2018  
Later Modifications as Noted

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## **Wireless Barcode Scanner Borrowing Policy**

The wireless barcode scanner currently available to borrow from LCI is a Zebra CS3000 (formerly Motorola CS3000). It is primarily available to use in conjunction with the LCI Inventory Report

([https://www.libraryconnection.info/members/inventory\\_report.php](https://www.libraryconnection.info/members/inventory_report.php)). Libraries borrowing the scanner agree to the following terms:

- 1) Libraries are guaranteed a minimum borrowing time of 21 days. After that time, if no other library has requested to use the scanner, the borrowing library can continue to use the scanner until it is requested by another library.
- 2) To keep track of where the scanner is, LCI will check out the scanner to a patron account in Sierra, which can be a Library Use account. The borrowing library must indicate which account to use and must inform LCI if they deliver the scanner to another library, so that LCI can confirm that it is switched to a different patron account.
- 3) LCI staff will not be responsible for delivering or retrieving the scanner to or from the borrowing library. The borrowing library can arrange to pick up or deliver the scanner at either a Board/Committee meeting or at the LCI office.
- 4) The borrowing library is responsible for loss of or damage to the scanner. If lost or damaged, the borrowing library will either replace the scanner with a new scanner of the same model, or will reimburse LCI for the replacement cost, not to exceed \$250.