MeLCat Advisory Committee Meeting Meeting Minutes

January 12, 2018
Virtual Meeting

Committee members present: Barnard (Orion Twp PL), Barton (Mulliken DL), Biggs (LM), Bolger (Cornerstone U), J. Brown (Millington Arbela DL), Chartrand (East Lansing PL), Dana (Oakland County Law), Hannert (Northwestern Michigan College), Heidemann (Saginaw Chippewa Tribal Lib), Lutenske (PL of Saginaw), Schaubman (MCLS), Zebula (Lawrence Tech)

1. Welcome.
2. Minute taker (Paul Lutenske) – Great job, Paul!
3. Announcements

   - Deb Biggs reminded us that she will be leaving Library of Michigan on March 1st. Noted that the position description has gone out. She will be looking for a part-time position with a short commute.
   - Debbi Schaubman reported that the next meeting will be attended by several new committee members, meaning, of course, that today's is the last meeting for several current committee members.

4. Pickup Elsewhere Discussion

   a. At the previous meeting there was concern expressed over the similarity of some library names causing patron confusion when selecting a pickup location. It turns out that the number of characters allowed for the library name is larger than first thought; thus, the plan is to include the name of the city or town for those library names that are too similar. This still leaves the problem of patrons not realizing that the library they want as a pickup location is, for example, part of a district library and thus not part of the initial menu of pickup locations. It was asked if it would be possible to provide a menu of cities first, but that's not possible since PUE uses the same menu-providing process as "regular" MeLCat. One possible piece of help might be to see if the location map could be "incorporated" into the process somehow. In any event, the patron's home library will remain the default pickup location.

   b. Financial implications: This is primarily a concern with the patron's home library being financial responsible for materials that never pass through their staff's hands. Debbi reported that this is apparently not seen as an issue at other INN-Reach systems that use PUE in that they do not do the kind of which-library-owes-which-other-library-what tracking that we do. There was discussion of possible methods tracking/indicating which library sent back a PUE item. Ideas included RIDES shipping labels that included the shipping location or some sort of bookmark that would be inserted by staff when preparing the item for return shipping. Debbi will also investigate whether the transaction logs include (or can include) the "returning from" location.

   c. Marketing PUE to library directors: It may be useful to develop some talking points that can be shared with library directors re: reasons to participate in PUE. What's in it for them?

5. Visiting Patron policy in light of Pickup Elsewhere Policy (https://goo.gl/cCMksi)

   a. Discussion of whether the policy regarding the patron showing ID should be the same for Visiting Patron (7.3) as it is for PUE (8.3). (Visiting patron requires showing picture ID while PUE asks for picture ID **or** your home library card barcode.) Since patron authentication happens prior to pickup with

PUE, it may be that PUE can be more flexible in this regard. Interest was expressed in letting the Visiting Patron picture ID requirement be up to the library checking the item out. A question was raised as to whether Michigan privacy law requires a picture ID. (DS: This does not appear to be the case.) Concern was also expressed that if this is a matter of local library policy, staff will need to deal with patrons complaining that "Library X doesn't require me to show ID, why do you?" There was also interest in consistency in how MeLCat transactions are handled.

6. MeLCat Regional Meetings in summer/fall

a. Suggestions for the locations included Grand Rapids, "within an hour of Mt. Pleasant", and OCC. Anyone willing to host a meeting was asked to let the MeLCat team know.

b. Thoughts on format/content. Folks shared some of the stuff they liked via chat. Again, If folks have ideas for content they'd like to see (or not see), please let the MeLCat team know.

7. Project Updates

a. Longer academic loan period trial. Hoping to start this trial in March or April. The trial will only include libraries in the "public university" group.

b. Polaris to INN-Reach API (and generalized API). Ann Barnard reports that they are pretty happy with it at Orion Township. As a reminder, this is what allows a Polaris system (Orion, Clinton-Macomb, and (soon) Troy) to process their request through their local Polaris system instead of the DCB client. Debbi reports that a number of other ILS vendors have committed to working toward this.

c. Pass2ILL. (This is the functionality that, in real time, would notify the patron's home library when a request cannot be filled, allowing the library to attempt to acquire the item elsewhere.) Currently we are waiting for a fix on the DCB side for problems discovered during testing.

d. NCIP. No big news here.

e. ArticleReach Direct. The recent software upgrades should allow us to test this. However, there's a bit of configuration work that Innovative Interfaces needs to do before we can test.

f. Linked data. Our contract with Zepheira calls for quarterly "refreshes" of the data but they are behind on this. They have also not yet provided the web tool that will allow libraries to update info about their hours, social media, etc. We would also like to be able to have libraries able to use their own linked data to create, for example, pathfinders on their website, etc. Zepheira staff have committed to providing MCLS with project updates every 2 weeks. We're hoping that gets them back on track.

8. Other business

a. Bryonna Barton reported patron interest in being able to select the supplying library. Debbi explained that the short answer to this is, it can't be done. Staff does have access to this process through Request Balance Override (see the wiki) but this procedure should be used sparingly and NEVER provided to patrons. (Otherwise, request balancing can get thrown all out of whack.)