

SRCS 101

FAQ

What is this Virtual Union Catalog?

SRCS creates a virtual union catalog which will show the current, accurate holdings of all the participating libraries in Indiana. Patrons can see what libraries in the state actually own, and can place unmediated requests for permitted materials.

How big will this "Union" catalog be?

That depends upon how many libraries choose to participate. Indiana has almost 300 public and academic libraries. If all of them chose to participate in SRCS, that would create a union catalog of over 50 million items. That is larger than the collections of Library of Congress or Harvard. As of mid-December 2015, the combined catalog of libraries who have filed letters of intent creates a union catalog of 10,000,000 items.

How does the SRCS Virtual Catalog work?

Libraries can participate in SRCS two ways. The easiest way would be to provide a Z39.50 link to their current catalog. Every time a user searches the virtual catalog, that link would be used to query each library's catalog to see if they own the title and if it was available on the shelf. This is easy for the libraries to set up, but searching is relatively slow.

The second option would be to create a physical union catalog by asking member libraries to upload their MARC holdings to a central database on a regular basis. This takes more effort on the part of the libraries, but it results in a much faster search, since it only has to query libraries that own the title for holding information.

Do all of the SRCS libraries have to agree on one option or the other?

No. Each library can choose what works best for them. The system can handle both methods simultaneously.

What union catalog option is most likely for SRCS, a virtual or physical catalog (or a mixture)?

Because of the wide variety of libraries in Indiana, the most likely format for the SRCS catalog will be a mixture of virtual and physical catalogs.

If we want to participate in the physical union catalog, how do we send our MARC records?

Most ILS's can export MARC records that can be sent to Auto-Graphics. During the setup period, Auto-Graphics will be contacting each library with a specific set of questions based upon their local ILS. As a part of this process, library's can indicate whether they want to be virtual or physical union catalog participants.

Can the physical union catalog be queried? In other words, can we use an external discovery layer and query it for availability and check out?

Yes, however since it is likely that our SRCS catalog will be mixture of physical and virtual catalogs, this could affect response time.

Will Evergreen records be already loaded into a physical union catalog?

Yes. Whether or not the consortium decides to come in as a group, all of the records will probably be loaded. If some members decide not to join, those holdings and locations will not be requestable.

It sounds like Evergreen libraries may not have to do much to participate--is this correct?

Since the Evergreen catalog is administered centrally by the Indiana State Library, they will act as the technical contact for the system as a whole, whether or not the consortium decide to come in to SRCS as a whole. This will mean that individual libraries will only need to identify the specific locations that will be available from their collection.

Do patrons search a different SRCS database or is it fully integrated into our existing catalogs?

The SRCS catalog is a separate union catalog representing the holding of all of the participating libraries. Each library has the option of providing this catalog as their default catalog or as a supplemental resource.

Do libraries in other states offer only the union catalog or their own local catalog to their users?

There is no standard. Some libraries do it one way, while others go the other way. It is a local option.

Can we see a sample of the SRCS catalog interface?

The Indiana version will be developed over the course of the spring 2016. Meanwhile, the State of Wisconsin has provided us with a public link to their version, WISCat (<http://wiscat.net>), so we can get a feel for the basic look and feel of the system.

Is this what our patrons will see in the SRCS catalog?

You can get a feel for the search process by exploring the WISCat version (<http://wiscat.net>). We do not have permission to log in to this system, so the ***Request This Item*** button does not appear. We are requesting a live demo so we can see how this will look in action.

Do patrons need email to use SRCS?

No, but they will need a method to authenticate themselves in the catalog. Typically, this is an email or a library barcode and a pin number. Also, most systems use email and/or text users to alert users that their materials have arrived.

How does NCIP affect the way a library uses SRCS?

Library staff running NCIP will check materials in and out using the *ShareIt* interface and the NCIP connection will update their local ILS automatically. Staff at libraries that are not running NCIP will need to check materials in and out in both *ShareIt* and their local ILS.

Does Evergreen have NCIP and a Z39.50 server connection?

Yes.

Would we have to cover the cost of NCIP on our own?

If your ILS system does not have an NCIP connection, it will be the responsibility of the library to get it, if they want it. NCIP is not required to participate in SRCS, but it does simplify the staff workflow.

If we do not have NCIP now but plan to get it, do we need to note that on our interest form?

This information would be useful, but is not required. Libraries can switch over to using NCIP at any time.

How does SRCS communicate with an ILS without NCIP?

If your library is not running NCIP, then the two systems will not communicate directly. Staff will need to check materials in and out in both *ShareIt* and their local ILS.

Will NCIP update our ILS with renewals?

We are contacting Auto-Graphics about this issue.

What are the rules if I want to participate?

The requirements for participation are simple.

- Libraries must be running one of the listed ILS systems.
- Libraries can join as an individual library or as a complete consortium.
- Participating libraries must be willing to:
 - Provide a contact person who can work with the vendor to load or map their data with the new "union" catalog.
 - Loan at least part of their collection to other participating libraries.
 - Subscribe to InfoExpress.

Does this mean that I have to circulate all of my collections?

No. Each library can identify which of its collections are available to these external borrowers. As a general rule, the Resource Sharing Committee is recommending that if the item would circulate to someone coming in off of the street, then it should be available to SRCS patrons.

What is considered an acceptable percentage to loan from your collection to participate in SRCS?

There is no set percentage. The requirement is that your library must be willing to lend some portion of your collection through SRCS.

What policies will govern SRCS?

The Resource Sharing Committee is currently drawing up a list of recommended guidelines for SRCS participants, based upon the best practices established by other states that have this type of service, including Michigan, Ohio and Illinois, and others.

How will SRCS determine which library will fill the request?

Unlike OCLC, SRCS will only place a request with a library that owns the book and whose catalog indicates that it is currently on the shelf. If multiple libraries fit this definition, a load leveling algorithm will select a viable location based upon distance from the requestor and number of requests previously received.

For items that are held by many libraries, will the requests be filled based on geographic proximity in order to speed delivery?

Yes. One of the considerations SRCS uses is the requesting library's InfoExpress delivery zone. This is done to speed up the delivery time.

As a special library, is it possible to only lend materials and limit our patrons' requests for materials outside of our normal collection scope?

An individual library can have all of their patron requests mediated by library staff before they are released. This is about the only way that you could filter them by topic.

Can we limit the number of active requests for each individual like we currently do?

Yes. This figure should be among the settings recommended by the Resource Sharing Committee.

Will all participating libraries have a common loan period for all material eligible to be borrowed?

No, but the Resource Sharing Committee is developing a list of recommended policies for SRCS, which will include a minimum loan period.

How long do materials circulate on SRCS?

The recommendation of the Resource Sharing Committee is for the minimum loan period for all materials in SRCS to be 21 days.

Can each library retain their current circulation policy?

The Resource Sharing Committee is developing a list of recommended policies for SRCS. These will include a minimum loan period, not levying daily fines for SRCS materials, etc.

Could the loan period in SRCS be different from your standard loan period?

Yes. SRCS requests are interlibrary loans so the loan period may be different from your over-the-desk checkouts.

Does the supplying library check out the material to an individual or to SRCS?

Each supplying library uses a unique proxy record to check out the items to each borrowing library, there is no end-user information sent to supplying libraries. The borrowing library then uses a temporary bib and item record to check the materials to their local patrons.

What temporary information is stored in our ILS?

Items are checked out using a temporary bib and item record in the ShareIt system. Libraries running NCIP will have their local ILS updated automatically. SRCS only tracks the bare minimum of information needed to track the transaction. Once the item is checked back in at the owning library, all transaction data, other than statistics, is deleted.

What statistics are collected on the program?

The ShareIt program provides ILL activity for a specified time period or monthly ILL Summary Reports for either the entire consortium or for each library. These reports can be viewed on screen or downloaded or emailed as Excel spreadsheets or PDF documents.

Is the assigned due date when the patron needs to return the item or for when it is due back at the owning library?

According to the Interlibrary Loan Code for the United States, as issued and revised by the Sharing and Transforming Access to Resources Section (RUSA STARS), the due date is the date when the material is due to be checked-in at the supplying library. In other words, it is the date that the user is to return the item. Shipping time is not included.

How is the 'good standing' designation determined? Is this integrated among the systems?

This is based upon the standing of the patron according to the patron's home library.

So if we don't allow checkouts when the patron has \$5 in fines then SRCS will recognize that and block them from placing the request?

If your library's ILS has the user flagged as "Not in good standing," then they would not be able to place a request in SRCS.

Will the system prevent our patrons from requesting something we have on our shelves?

Yes. All requests will be filtered for the patron's home library first, then for the libraries in the local InfoExpress delivery zone and then elsewhere.

What if we look for an item and it ends up missing, how can we turn down the request and move it to the next supplier. Will that be mediated?

If the requested item is not available, the staff at the responding library can update the request to WILL NOT SUPPLY. This will automatically send the request to the next available library.

What happens if there are no suppliers available in SRCS?

When no eligible libraries can be found, the request is sent back to the requester with the status of UNFILLED. These requests can be passed to the traditional ILL system at the patron's local library to be processed as a mediated interlibrary loan request.

What traditional ILL systems does SRCS work with?

ShareIt works with most traditional ILL systems, such as WorldShare ILL, ILLiad, VDX and others using the ISO ILL protocol.

How will we circulate items when they arrive, as various barcodes will not work together?

Items are checked out using a temporary bib and item record in the ShareIt interface. If your library is running NCIP, the local ILS will be updated.

How are renewals handled?

The patron can log into their My Account screen in the catalog and request a renewal. Owning library staff will review this request and either grant or deny the request. Libraries equipped with NCIP will have their local ILS updated automatically

Currently we don't renew an item if one of our patrons has it on hold, how will this work with SRCS?

We are contacting Auto-Graphics about this issue.

Can the system handle requests for multiple volume sets?

Yes, depending on how such sets are cataloged. Users can request the entire set or a specific volume on the same request.

Can you limit what items are available to request outside of our home institutions? For example, can we say that items that are 6 months or newer won't be sent?

Each library determines what parts of their collection circulates and what parts don't. If your ILS provides a way to identify new titles, then that location should be able to be excluded.

How early might a list of customizable library settings be available, something to help a library determine if they want to re-evaluate current ILL policy?

We are contacting Auto-Graphics about this issue.

Our library is always closed for a week in September. Will we be able to temporarily "turn off" our participation for that week?

We are contacting Auto-Graphics about this issue.

Can material be recalled by the owning library?

Yes.

Will SRCS loans accrue daily fines?

No. SRCS requests are interlibrary loans, and the recommendation of the Resource Sharing Committee is that they should not accrue daily fines.

Would the person checking out the materials be held responsible for the cost of the item if it was not returned to the library?

Yes, just as they are now with a normal interlibrary loan.

Who will be responsible for collecting lost material fees, the owning library or the patron's home library?

SRCS does not have a mechanism for collecting or distributing payments. The Resource Sharing Committee is developing a list of recommended policies for SRCS.

How will problems be addressed? Does ISL have final say or with there be mediation between member libraries?

The State Library will work with Auto-Graphics to solve problems with the system. The Resource Sharing Committee will advise on general policies, and borrowing and lending libraries will be expected to work together to work out solutions to problems, as they would for any other interlibrary loan problem.

Does the system automatically generate labels (with loan information) for material sent out to borrowing libraries?

Yes.

When you say the system generates labels, is that a label or a slip of paper. Will we need additional equipment?

The format of that information depends upon the equipment you have available. You will not have to purchase any new equipment.

Can there be multiple locations for delivery within our system for patrons to request their items or does it have to be a single location?

Yes. Libraries can set up each individual branch as a delivery location, and subscribe to InfoExpress at each location. Or they can give their users the option of picking up their materials from any of their branches, but having all materials delivered to a single system location. This location would then be responsible for distributing the materials to the other branches.

What about overdues and notices?

Lost items are managed between the borrowing and the lending libraries, in accordance with policies recommended by the Resource Sharing Committee. Each borrowing library can set up automatic overdue notices which are triggered by a status of OVERDUE.

Could you run down what would happen when Patron Joe Smith loses a book from Library A? How would the patron be notified? How would the library receive replacement costs?

The final policy on this depends upon the recommendation of the Resource Sharing Committee, but in general, once an item becomes overdue the patron would start to receive automatic email notices based upon a predetermined schedule. If that does not get results, the requesting library staff would need to make other contact in an attempt to recover the book. If that fails, then the borrowing library will need to consult with the lending library on the replacement cost.

Will notifications be determined by current ILS system? In other words, if we can receive text patron notifications, or will that will not change.

Each borrowing library can set up automatic email notices which are triggered by a status of OVERDUE. *We are contacting Auto-Graphics about the possibility of sending these as text messages.*

Will participation in SRCS meet the ILL requirements in state standards?

Pending action by the ILHB, active participation in SRCS is expected to meet the resource sharing requirement in the Public Library Standards, IC 590 IAC 6-1-4 (existing standards) and 590 IAC 6-1-5 (revised standards).

How much will it cost to join SRCS?

At the present time there is no cost to the participating libraries for this service. The State Library has agreed to pay for the setup and annual connection fee for all participants. Support will be continued if participation and use warrant it and if continuing funding can be found.

Are there any hidden costs?

There are no hidden costs, however based upon our experience with a similar functionality in Evergreen Indiana; we are advising that participating libraries could see an increase in the volume of resource sharing both from their collection and for their patrons.

When will SRCS start?

Plans are for the State Library to determine interest for participation between now and the end of January 2016. Auto-Graphics will work to get the libraries set up during the first quarter of the year. Staff training is tentatively scheduled for April, followed by soft roll out. Current plans call for the official stateside launch in the summer of 2016.

How do I sign up to participate?

If your library is interested in participating in SRCS, please complete a copy of the Letter of Intent form available at http://in.gov/library/files/SRCS_Interest_Form.pdf.

How long to I have to decide?

These letters will be accepted until January 31, 2016.

If a library does not sign up to participate by Jan. 2016, when is the next opportunity to join?

The State Library has set the January 31, 2016 date as a firm cutoff for the initial group. However the ISL has a two year contract with Auto-Graphics to set up this system, so there will be other sign-up windows during that period. The frequency of these windows has not yet been determined.

Do library boards need to approve participation in this program?

That is a local decision. While there is no fee for participating in SRCS, it is expected that there will be an impact upon your operations. Please consult with your board if you feel it is appropriate.

Can the letter of intent be sent via email attachment?

Yes. Email attachments, fax, US mail are all acceptable options.

Can you opt out after you've submitted a letter of interest?

Yes, at any time. There is no cost for withdrawing, since your records and location can just be switched off.

If a library participates, but then decides they want to leave SRCS, how does that process work? Are there any repercussions for a library leaving SRCS?

No. All you need to do is to notify the State library and your catalog will be turned off.

If a library joins SRCS, does that mean that IN-SHARE would never be used anymore?

IN-SHARE provides mediated interlibrary loan service to libraries that do not have their own ILL staff. It is hoped that a large percentage of the requests currently going through IN-SHARE can be filled more efficiently through SRCS. That service, however will never completely replace IN-SHARE. SRCS is for returnable items only, the IN-SHARE service will still be needed for photocopies, and for materials not available within the state.

How do I get more information about SRCS?

For more information about the SRCS program, please contact:

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