HD Delivery to Non-Owning Libraries Pilot Project

Project Summary

In June 2005, the University Library Council met to discuss issues of relevance and to develop priorities for the coming year. One of those priorities was the exploration of a service to deliver materials from HD to non-owning libraries in an effort to provide enhanced service for users.

Review of the necessary changes in Aleph, at HD, and in library circulation areas to provide this service began in the spring of 2006 and in early summer the ULC approved a one-year pilot project, to begin September 25th, 2006, that will allow a library user to request a circulating item held at HD to be delivered to a participating library.

Participating Libraries

Participating libraries are identified as those that currently have an HD account and that use Aleph for circulation transactions. Please see Appendix A for eligible patron statuses and libraries participating in the pilot.

How the Service Will Work

An example of how this service will work is as follows:

- a patron at the Medical School finds a regular circulating item in HOLLIS that is owned by Widener library and located at the depository.

- The patron can “request” that item and select a pick-up location from among the list of participating libraries – including the Countway Library, if that is most convenient.

- Materials will be delivered by HD to the designated pick-up location each day.

- When the material is processed by circulation staff the borrower will receive a notice that the item has arrived and is ready for pick-up.

Materials checked out from pick-up locations will circulate for the same loan period as they would if they were checked out at the owning libraries circulation desk. Materials may be returned to any Harvard library.

Placing Requests in the HOLLIS Catalog

For participating libraries, "Request" links will appear on HOLLIS availability screens for all Regular Loan items with an Item Processing Status of "HD".
After the patron has clicked on the Request link, he/she is brought to the Request page. The top portion of the request screen for the item includes general information about requests for HD items. Available “Pick-Up” locations are listed at the bottom of the screen. The owning library will be the first in the list – other participating libraries will be listed beneath alphabetically. If no choice is made on the list (the user just clicks Send Request) the item will be sent to the first library on the list (i.e. the owning library).

Placing Requests in the Aleph Client

For participating libraries, the “Pickup Location” drop down list will be populated on the Create Hold Request screen for all Regular Loan items with an Item Processing Status of “HD”. The owning library will be the first in the list – other participating libraries will be listed beneath alphabetically. If no choice is made on the list (the library staff member clicks the OK button) the item will be sent to the first library on the list (i.e. the owning library).

Revised: September 18, 2006
HD Delivery of Requested Material

At 6:55am, 11:55am, 3:25pm Monday – Friday, an Aleph process creates files of requested barcodes, including the designated pick-up location for each barcode and relevant billing information, and transmits the file to the HD Inventory System.

The HD system ingests the data file and opens retrieval workorders sorted by pick-up location. HD staff pull the materials from the shelves, pack the materials in circulation bins, and deliver the bins to circulation delivery stops.

Note: In this pilot project, the red HD circulation bins delivered to participating libraries may contain both materials the library owns and material from other libraries.

Library Receives HD Material

Patron Notification: Library staff should discharge material in Aleph to initiate hold request notification (if item is at correct Pick-Up location) or transfer slip (if item is not at the correct pick-up location).

Note: It is highly recommended that staff do not use the “Print Letter – Hold Request Filled” functionality in Aleph as this method of patron notification does not verify that item is being checked in at the designated Pick-Up location. OIS staff have reported this discrepancy to Ex Libris and will inform library staff when the problem has been resolved and the “Print Letter – Hold Request Filled” option can again be used.

Changes to the Available for Pick-Up Notice: The pick-up location information has been added to text of the notice in both the opening paragraph and in the first line of the item details table.
The following item, which you requested on 09/23/2006, is now available for pick-up at Tozzer:


**Changes to the Available for Pick-Up Notice Slip:** The pick-up location information has been added to the slip under the hold expiration date.

**Available for Pick-Up Notice Slip**

**Morse, Laura**

09/27/2006

Tozzer

**Material is loaned to Patrons**

The patron will visit the pick-up location to retrieve the item. The item will circulate according to the loan policies/due dates of the owning library.

**Note:** The fixed ip addresses of specific machines used to charge materials for all participating libraries to patrons must be specially registered with OIS.

The following best practices were agreed upon at the August 8, 2006 Circulation Managers meeting:

- To ensure tracking of all material, non-owning libraries must charge requested material out to patrons in Aleph when those materials are picked up at the desk. Staff should refrain from handing the material over to the patron to simply make photocopies without charging out the material to patron first.

- If material in poor condition is received by a non-owning library, the pick-up library should first contact the circulation staff at the owning library to determine how that specific situation will be handled (e.g., book sent to owning library for in-house use and patron notified when book is in disrepair). Circulation staff contact information is listed in the HUL directory.

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• If an item arrives at the pick-up library without a circulation date due slip in the back of the book, the pick-up library should use one of their own.

• Material will circulate according to loan policies/due dates of the owning library. Some libraries may need to obtain additional due date stamps to accommodate different dates than they apply to their own material.

These best practices will be reviewed by Circulation Managers in future meetings and adjusted as necessary.

Material is Returned to Library/Removed from the Hold Shelf

Patrons may return items to any library. If items are returned to the non-owning library a transfer slip will be generated on discharge indicating that the material should be returned to the owning library OR to the library where another requestor has asked for delivery. Materials should be returned to the library indicted on the Transfer Slip.

**Note:** If the item is not retrieved prior to “End Hold Date”, the item will appear on the Hold Shelf Report of the pickup library. The “End Hold Date” will be determined by the pick-up library’s “Time on Hold Shelf” period. **Material that has met the end hold date should be discharged so that a transfer slip is generated.**

**Changes to the Transfer Slip:** The recall date has been added to the Transfer Slip below the Transfer Time.

| Transfer Date: | 09/15/2006 |
| Transfer Time: | 06:18 PM |
| Recall Date:   | 09/15/2006 |
| Sublibrary:    | Loeb Music |

Questions or Comments

If you have any questions about HD Delivery to Non-Owning Libraries Pilot Project, please send a request to the Aleph Support Center in the category Circulation:

Appendix A: Participating Patron Statuses and Libraries

*Participating Patron Statuses:*

**Employees**

01 Faculty

02 Officer

03 Staff (05)

05 Staff (05)

**Students**

11 Graduate*4*student

12 Graduate student

13 Undergraduate student

14 Extension School degree candidate

**Proxies**

21 Faculty (Proxy)

22 Officer (Proxy)

23 Staff (Proxy)

**Special Borrowers (FASX - FAS Cross-registered students)**

50 Library special borrower (50)

*Participating Libraries:*

CABOT SCIENCE LIBRARY
CHEMISTRY LIBRARY
DESIGN LIBRARY
ANDOVER HARVARD LIBRARY
FINE ARTS LIBRARY
FUNG LIBRARY
HARVARD YENCHING LIBRARY
KSG LIBRARY
HARVARD LAW LIBRARY
LITTAUER LIBRARY
COUNTWAY LIBRARY/HMS
MUSIC LIBRARY
PHYSICS RESEARCH LIBRARY
TOZZER LIBRARY
WIDENER LIBRARY

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