

MiLE Library Manager Training
Walsh College, Room 117
Wednesday, May 8th, 9:30 a.m.– 12:00 noon
AGENDA

- | | | |
|-----------|---|----------------------|
| 1. | Welcome and introductions—Scott Muir | 9:30 – 9:40 |
| 2. | MiLE demonstration—Scott Muir
--user at Horizon site
--user at non-Horizon site
--MiLE project Website | 9:40 – 10:00 |
| 3. | MiLE Library Implementation Checklist (I-III)—Scott Muir
--Joining the project
--Local system readiness
--URSA implementation guide forms | 10:00 – 10:15 |
| 4. | URSA Online Profile Forms (Checklist V)—Louise Bugg | 10:15 – 11:00 |
| 5. | BREAK | 11:00 – 11:15 |
| 6. | MiLE Implementation Checklist (VII-XI)—Louise Bugg
--Van service
--Local Web access to MiLE
--Training and testing
--Publicity and evaluation
--Going LIVE! | 11:15 – 11:40 |
| 7. | Set up local ILS for URSA (Checklist VI)—Louise & Scott
--Focus on Horizon setup | 11:40 – 12:00 |

L.Bugg/S.Muir
May 7, 2002

Handouts for the Library Manager Training

1. Web addresses for MiLE
2. List of pages to complete in URSA Implementation Guide
3. Sample URSA profile forms from WSU (and MiLE Website)
4. Sample email messages from WSU
5. Sample Horizon btype, itype and collection code info from WSU
6. MiLE problem reporting procedures

URSA IMPLEMENTATION GUIDE INSTRUCTIONS

Forms 2a - - 2b

Master Gateway Server Information

This information is completed by the MiLE Project Manager at TLN

Form 3a

Resource Sharing System Coordinator is Scott Muir. This form has been submitted by DALNET

Forms 3c - 3f

Local Library System Administrators

Identify person(s) at your DALNET library

Form 4a-

(DALNET) = Local Automation Systems

Form 4b -(DALNET Libraries)

Virtual Catalog - Yes to all questions

Patron Access - Yes to all questions

Brokering - No to all questions

Lending Library Request Mediation - N/A

Requesting Items Procession - N/A

Lending Library Check In - N/A

Form 5a - (DALNET Libraries)

Catalog Name = Institution Name

Form 5b - (DALNET Libraries)

Catalog Name = Name of Library

Z39.50 Telnet Address

Z39.50 Server Port

Z39.50 Server Database

Call George Marck

Local Holdings Information - N/A

Form 5c - (DALNET)-N/A

Form 5d - (DALNET) - N/A

Form 5e - (DALNET)

Library Name-Institution

Address-include city

Contact Name: - Person to contact for system information

Phone - Include area code and extension (if applicable)

E-Mail - (one address)

Transactions to be submitted- Use OCLC statistics OR other system statistics that reflect **current** interlibrary loan transactions. If you do not currently do interlibrary loan you will need to estimate

Brokering - No

Broker requests for other libraries - No

Form 5f - (DALNET)

Use this form IF you have more than one location. e.g.. OCC, UDM, MCC

Library Name = Branch name + contact information

If the branch is a pickup location mark Yes
Form 6 – DALNET) – N/A



Qualifier Set Name:	WSU EXP	Exclude
Patron Location(s):	<input type="text"/>	<input type="checkbox"/>
Patron Type(s):	wsalum, wscomp, wsfac, wsgestf, wsgests	<input type="checkbox"/>
Stat Group(s):	<input type="text"/>	<input type="checkbox"/>
Access Type(s):	<input type="text"/>	<input type="checkbox"/>
City State:	<input type="text"/>	<input type="checkbox"/>
Postal Code:	<input type="text"/>	<input type="checkbox"/>
Items Out Threshold:	<input type="text"/>	
Fee Balance Threshold:	\$ <input type="text"/>	
Lost Threshold:	<input type="text"/>	
Overdue Threshold:	<input type="text"/>	
Valid Card Check:	<input checked="" type="checkbox"/>	

Sip 1.00 Patron Status Qualifiers

- | | |
|--|---|
| <input type="checkbox"/> Charge Privileges Denied | <input type="checkbox"/> Renewal Privileges Denied |
| <input type="checkbox"/> Recall Privileges Denied | <input type="checkbox"/> Hold Privileges Denied |
| <input type="checkbox"/> Card Reported Lost | <input type="checkbox"/> Too Many Items Charged |
| <input type="checkbox"/> Too Many Items Overdue | <input type="checkbox"/> Too many Renewals |
| <input type="checkbox"/> Too Many Claims of Items Returned | <input type="checkbox"/> Too Many Items Lost |
| <input type="checkbox"/> Excessive Outstanding Fines | <input type="checkbox"/> Excessive Outstanding Fees |
| <input type="checkbox"/> Recall Overdue | <input type="checkbox"/> Too Many Items Billed |

OK Cancel

Wayne State University Library System, MiLE borrowing

Item types requestable in MiLE

wsbook – regularly circulating books
wsdocm – regularly circulating Michigan documents
wsdocs – regularly circulating Federal documents
wsdocu – same as above
wsxths – circulating theses

Item types disallowed from MiLE requests (examples)

wspser - serials not periodicals
wsrxrx - reserve itypes that I won't list out
wsccdr - cd-roms
wscsft - computer software
wsperi – periodicals –

Patrons allowed to set requests:

wsstaff – current staff
wsstud – current Undergraduate students
wsstug – current Graduate students
wsfac - current faculty

Patrons not allowed to set requests:

Wsgestx – any guest category of borrower
Wsalum – alumni
Wscorp – corporate borrowers
Wsipass – Infopass borrowers
Expired patrons
Patrons that owe over \$300 in fines.

Collections requestable:

All library stacks collections, including special collections like oversized.

Collections unrequestable:

Reference and Ready Reference collections
Reserves collections
Video/media collections
Periodical collections
Microform/microfiche collections
Index and abstract collections
CD-ROMs/CDs/audiotapes

Statuses requestable:

Checked in
Shelving cart

Statuses unrequestable:

All others not listed above.

MiLE CheckOut/CheckIn Procedures:

Check Out:

Circulation staff create fast adds to check out books to WSU users from other MiLE libraries:

- 1) Retrieve purple banded book from your ILL Hold location.
- 2) Call up the patron's record in Horizon.
- 3) Create a fast add. Fill in fields with:
 - a. Title from book
 - b. Location=whatever your location is (wspk, wssc, wslw, wsug, wsoc)
 - c. Collection=wsmile
 - d. Call no. from book
 - e. Call type, (LC, Dewey, Other, etc)
 - f. Barcode from book
 - g. Item type=wsmile
- 4) On the book band, where it says "Return this item to:" write "Any WSU" Library. Put the due date next to the "By:"**
- 5) Each book should have a survey inserted in it. Provide the patron the opportunity to fill out the survey at the time the item is circulated. Forward completed surveys to the ILL staff in your unit.
- 6) Desensitize book.
- 7) Give to patron. Tell them what the due date is and that there are no renewals.

Check In:

Check in item in Horizon. The barcode and fast add record will automatically delete upon check in. Give book to ILL staff to complete processing.

Books may be returned with no book band. Any book from any other library that is received in WSU libraries this way should be checked in.

Return Slip

To: _____
Delivery #

Library Code

Request #



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