

**MiLE Steering Committee Meeting
Walsh College
April 24, 2001, 9:00 a.m. – 12:00 noon
AGENDA**

- 1. Review minutes of April 13th meeting and today's agenda 9:00 – 9:05**
 - Minute taker today—Bob Kelly?
 - June 8th meeting—Louise has a conflict

- 2. Vendor RFP review 9:05 – 9:45**
 - Team input and questions
 - Answers from vendor calls
Fretwell-Downing—Eileen
Epixtech—Louise

- 3. Reference calls 9:45 – 10:15**
 - Fretwell-Downing calls—Eileen and Bob
 - Epixtech calls—Tammy and Louise
 - Confidentiality

- 4. Vendor demonstration plans 10:15 – 10:30**
 - Final scenarios and tasks (previously distributed)
 - Invitations and RSVPs—Eileen
 - Local site arrangements; lunch plans--Bob

- 5. Plans for Steering Committee and Tech Team Meetings with vendors on May 2nd 10:30 – 11:00**
 - Goals for these meetings
 - Technical info gathered about our local systems—Scott
 - Agenda/questions for vendors

- 6. Decision making process after the demos 11:00 – 11:30**
 - Tallying the demo evaluation sheets
 - Input from Teams
 - Use Eileen's evaluation sheets?
 - Any other info/data to gather—e.g., financial info

- 7. Other issues 11:30 – 12:00**
 - Team reports
 - LSTA for Phase 2—timing for letters of support
 - Add K-12 library
 - Fall MLA Conference program with LTD

L. Bugg April 18, 2001

MiLE VENDOR DEMONSTRATION SCRIPT

Resource Sharing System Products

The purpose of these demonstrations is to provide an opportunity for Library staff to see the latest systems and to assess how well these systems would meet the MiLE Project's needs for patron initiated interlibrary loan that searches across the participating libraries' catalogs and that seamlessly integrates with local library circulation systems. MiLE Libraries' Staff have helped develop these scenarios and tasks.

General Instructions

1. Please follow the script as best you can.
2. Please announce which task is being demonstrated to help the staff follow along.
3. Scenarios 1 through 5 should be demonstrated in the first hour and Scenarios 6 through 10 in the second hour. Please pace yourself to do some of each scenario, e.g., 10 minutes each. You may not be able to complete all the tasks in each one.
4. Questions are to be held until the 15 minutes for Q&A after each hour of the demonstration.
5. If there is time in the Q&A session, you may demonstrate other system features you would like the staff to see.

FUNCTIONAL AREA: Patron Interface—Searching

Scenario 1: A MiLE Library patron is searching for a title that is not available at her home library.

- 1.1 Please show the types of basic searches available when the patron uses the MiLE consortium system.
- 1.2 Demonstrate the advanced searching features of the system.
- 1.3 Show what happens when an online catalog of a participating MiLE library does not respond to a search.
- 1.4 Show how the patron can stop a search already in progress.
- 1.5 Show how the search results are displayed when only one library owns the title and when several libraries own the title. Show both brief and detailed displays.
- 1.6 Show how holdings and availability information are displayed for copies and volumes of titles found.
- 1.7 Show how the system prompts the patron when the search results in “no hits.”

FUNCTIONAL AREA: Authentication and Security

Scenario 2: A patron is using a Web browser from home to search MiLE and request an item.

- 2.1 A registered patron searches the OPAC of his home library first. When the item is not found, show how he is prompted to use the MiLE catalog. Show how and when the system verifies that he is a registered user at that library.
- 2.2 Unfortunately, he has been blocked from borrowing privileges at his home library. Show how the system prevents him from making a MiLE request.
- 2.3 An unregistered patron searches the OPAC of a MiLE library. When the item is not found, show how he is prompted to search MiLE. Show how the patron is allowed to search MiLE as a “guest” but is prevented from placing a MiLE request.
- 2.4 The patron needs to know the status of a request he made earlier. Show how the system authorizes him to view only his own information online.
- 2.5 A Library staff member needs to know the status of a patron’s request. Show how the staff member’s security allows her to check only her library users’ requests.

FUNCTIONAL AREA: Patron Interface—Requesting

Scenario 3: A MiLE Library patron has searched the OPAC of his home library. His home library does NOT own the item he wants.

- 3.1 He searches the MiLE system and finds the item at two or more consortium libraries. Show how he identifies which libraries own the item and whether they are available for circulation.
- 3.2 Show the steps he must take to place the request, including delivery instructions.

- 3.3 Demonstrate how a hold is placed on the local system of the lending library for the item he has requested.
- 3.4 Demonstrate how the patron could get a copy of his request and what information would be included.
- 3.5 He searches for a second item and it is available at his home library. Show how the system prevents him from requesting it.
- 3.6 He searches for a third item and doesn't find it at any MiLE Library. Show how he places a request using a blank request form.
- 3.7 Please repeat the above steps for a periodical article. Demonstrate how periodical holdings are displayed and checked to fill the request.

FUNCTIONAL AREA: Library Functions—Borrowing Library

Scenario 4: The staff in a MiLE Library are processing their users' requests.

- 4.1 Please demonstrate how a Library staff member reviews pending requests made by their users. Show how the staff member can choose the lending library for a request.
- 4.2 Show how the staff member is notified that a requested item has been sent from the lending library and what steps he takes to receive the item when it arrives.
- 4.3 Show how the patron is notified that the item is available for pick-up and which system sends the notice.
- 4.4 Demonstrate how the system interacts with the local circulation system when the Library staff member processes the item for the patron, e.g., when the item is returned by the patron. Show how the item's barcode is used during the process.
- 4.5 Show how the system notifies the patron and the staff member if the request is unable to be filled.
- 4.6 The Main Library in the Public Library System serves as the "broker" for interlibrary loan requests between branches as well as with libraries outside their system. Show how the system accommodates this situation.
- 4.7 If the request is unable to be filled by a consortium Library, show how the Library patron and staff member would make an ILL request to get the title from outside the consortium, e.g. from OCLC.

FUNCTIONAL AREA: Library Functions—Lending Library

Scenario 5: A request made by a MiLE Library patron has been sent to a potential lending Library.

- 5.1 Please show how the Library staff at the lending library are notified that a request is pending. If the Library has more than one location, show how the notification could work.
- 5.2 Show how the lending library accepts or rejects the request.
- 5.3 When the lending library fills the request, show the steps the staff member takes.

- 5.4 Show the information available about this transaction to staff in the lending library and to the patron.
- 5.5 Demonstrate item recalls placed by the lending library.
- 5.6 If the library did not respond to the request, show at what point and how the request is transmitted to another potential lending library.
- 5.7 Show the process Library staff follow to receive the item back from the borrowing library.

FUNCTIONAL AREA: Patron Interface—Design

Scenario 6: Mile Library or consortium staff need to customize the system's user interface to clearly identify this as a MiLE service and to help users know what to do.

- 6.1 Demonstrate how to use the system to customize the user interface, e.g., the welcome, logon and search screens.
- 6.2 Show how to use the system to customize the data elements and labels displayed in search results for items. Show brief and detailed display options.
- 6.3 Demonstrate the options available within the system for Library or consortium staff to customize Help screens for users.
- 6.4 Demonstrate how to customize system messages, including error messages and prompts.
- 6.5 Show how patron notices can be customized.
- 6.6 Identify any parts of the user interface and notices that can NOT be customized.

FUNCTIONAL AREA: System Architecture

Scenario 7: A Library staff member at a MiLE Public Library needs to make sure their circulation and interlibrary loan policies are working through the system.

- 7.1 Please demonstrate how to enter and edit system parameters for circulation and ILL.
- 7.2 Some patrons are allowed to request materials without mediation, others require mediation and a few patron types are not authorized to make requests, e.g. adult borrowers may be unmediated, juvenile borrowers may require mediation, and guest borrowers may not make requests. Show how these policies are handled in the system parameters.
- 7.3 Show how the system would be set to prevent a request being made by a patron who is blocked in the home library. Show what types of blocks are considered.
- 7.4 Some collections in the Library do not circulate, e.g. the Reference and Periodical Collections. Show how the system would be set to block requests for some non-circulating collections, like Reference, but not others, like Periodical articles.

- 7.5 Most items circulate for 3 weeks, however, some—like new books—circulate for 7 days. Show how this policy is handled in the system parameters.
- 7.6 City Public Library prefers requests to go to other nearby public libraries first. Show how the system can be set to send requests to a selected group first. Show how it can be set to block requests from going to the University Library across the street, where patrons can walk to get their books.
- 7.7 University Library wants to allow requests for some collections to be unmediated and require requests for other collections to always be mediated. Show how the system can be set up to do this. Show any cases when the system always requires mediation.
- 7.8 Briefly show the security features for staff access to the system, including functions that can be controlled at the local library, library consortium and system administrator levels.

FUNCTIONAL AREA: Management and Support—Reports

Scenario 8: Staff need to report on their interlibrary lending and borrowing for the past year.

- 8.1 Please demonstrate what system-supplied ILL statistical reports staff at a participating Library could run themselves, e.g. items requested, items lent, items borrowed, patrons served.
- 8.2 Please show what system-supplied ILL performance reports the staff at participating Library could run themselves, e.g. turnaround times, fill rates, transit time.
- 8.3 Please generate a system-supplied report for a calendar year and show options for where it could be printed.
- 8.4 The Library Director requests a customized (or ad-hoc) report that is not supplied by the system. Show what a staff member in that Library could do to create a locally developed report.
- 8.5 The OWLS participating libraries need to report at their annual Board meeting. Show what system-supplied reports they can generate for their group of participating libraries, e.g. borrowing and lending among OWLS libraries and outside of OWLS, number of OWLS patrons served.
- 8.6 The MiLE Project needs to report to the Library of Michigan on consortium-wide resource sharing. Show what system-supplied reports can be generated across the participating libraries, e.g. net lenders, net borrowers, number of requests daily, average fill rates.
- 8.7 The OWLS staff person has trouble getting their report to run and locks up the system's server. Show how this person can get emergency help for the server problem from the vendor's customer service. Show what options there are for non-emergency help with the report.

FUNCTIONAL AREA: Training and Documentation—Users

Scenario 9: A registered library user is about to use the MiLE system for the first time to locate and request a much-needed item.

- 9.1 Please show how a new user would get to a welcome screen, e.g. "Click Here if You are a New User." Show the overview or tutorial the new user would see.

- 9.2 The user is about to begin searching for the item. How does he know what his search options are? Show the relevant Help screens and messages.
- 9.3 While searching, the user makes a mistake. Show the types of error messages that would be displayed to help him fix his mistake.

FUNCTIONAL AREA: Training and Documentation—Staff

Scenario 10: A new staff member in a MiLE Library needs to learn how to process user requests and to use the system to circulate borrowed materials to their patrons.

- 10.1 The new staff member begins with an online overview or tutorial. Show the process she would use.
- 10.2 The staff member attends a training class and learns how to use the online manual. Demonstrate how she uses it to look up a specific function.
- 10.3 The staff member is processing her first request and forgets what to do. Show the Help screens and online prompts she could use.
- 10.4 The staff member is processing a requested item and makes a mistake. Show how the system alerts her to the mistake and provides help to undo the mistake and try again.
- 10.5 Show the ways MiLE Library staff can customize online manuals, Help screens, error messages and prompts for staff functions.

MiLE Steering Committee
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