DOCUMENT OVERVIEW

This document outlines and provides best practices for resource sharing within NC Cardinal. All policies and procedures are recommended and should be implemented throughout the consortium. As resource sharing issues and new topics arise, this document will be amended. If you have any questions, please contact the State Library or one of the current NC Cardinal Resource Sharing Committee members.

HOW IT WORKS

For a detailed explanation of how holds work, see the Evergreen Basic Training document on The Nest at http://statelibrary.ncdcr.libguides.com/thenest/manuals.

Every member library system must designate a hub library and contact person for shipping and receiving resource sharing materials. A backup contact person should also be selected in case the primary contact is unavailable. Information pertaining to shipping locations and contacts are available on The Nest at http://statelibrary.ncdcr.libguides.com/thenest/manuals. Always keep an up-to-date list of shipping locations and contacts available when preparing to ship materials to another library system.

All materials shared between NC Cardinal consortium members are shipped via UPS from one hub library to another. Member systems that have multiple locations are responsible for intralibrary transits between their hub library and their other locations.

Hold Limits and Restrictions
On the whole, NC Cardinal requires that member systems share all holdable books and audiobooks across the consortium and are encouraged to share as much other material as possible. Member libraries are allowed some limits or restrictions on the type of items, the number, and the patron permission groups that may place holds. For example, reference materials, outreach department items, and realia usually are non-holdable outside of their owning systems. These limits and restrictions are subject to change and should be checked on The Nest at http://statelibrary.ncdcr.libguides.com/thenest/manuals.

DAILY ACTIVITY

Generating a Pull List for Hold Requests
A small library branch should generate a pull list at least once per day. Medium to larger libraries should do so multiple times per day so that a reasonable workflow is established. The pull list will include materials for both local holds and consortial resource sharing.

On the Circulation Menu, select Pull List for Hold Requests:
The column picker may be used to select which fields appear on the screen. Your column selections will not alter the format of the Printable Full Pull List. For example, this possible column configuration that is sorted by copy location and call number and includes patron and pickup library information on the screen:

would produce this printable list:
There are three available print formats for pull lists:

- Print Full Pull List
- Print Full Pull List (Alternate Strategy)
- Simplified Pull List Interface

For short lists, the Print Full Pull List and (Alternate strategy) options are quick and easy. For longer lists, you may prefer the Simplified Pull List so that you can choose which fields to include and determine the sort order. To activate the Column Picker in the Simplified Pull List, right click anywhere on the column header line, select the columns you want and set the sort priority, then scroll to the bottom of the list and click on Save. The following is an example of a column configuration for the Simplified Pull List:
This configuration would result in the following printable list:

<table>
<thead>
<tr>
<th>#</th>
<th>Shelving Location</th>
<th>Call Number Label</th>
<th>Author</th>
<th>Title</th>
<th>Barcode</th>
<th>Copy Status</th>
<th>Pickup Library</th>
<th>SMS Carrier</th>
<th>Notifications Phone Number</th>
<th>Notify by Email?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Adult audiovisual area</td>
<td>DICKEY ERIC 12 CD</td>
<td>dickey, eric j</td>
<td>a wanted woman</td>
<td>211250291171 Available</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Adult audiovisual area</td>
<td>DVD COMEDY RATED PG-13</td>
<td></td>
<td>the bucket list</td>
<td>011251910314 Available</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Adult audiovisual area</td>
<td>DVD COMEDY RATING PG13</td>
<td></td>
<td>bring it on</td>
<td>211252026596 Available</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Adult audiovisual area</td>
<td>DVD DRAMA</td>
<td></td>
<td>the piano lesson</td>
<td>01125173961 Available</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Adult audiovisual area</td>
<td>DVD DRAMA RATING NR [TV SERIES]</td>
<td></td>
<td>mad men</td>
<td>011251914530 Available</td>
<td></td>
<td></td>
<td>Cruz, Rizalito C</td>
<td>Clemons Branch</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Adult audiovisual area</td>
<td>GROOM, winston 7 CAS</td>
<td>groom, winston</td>
<td>forest gump</td>
<td>011250837072 Available</td>
<td>Boland, William Patrick</td>
<td>Boland, William Patrick</td>
<td>Kenersville Branch</td>
<td>336-442-1876</td>
<td>t</td>
</tr>
<tr>
<td>7</td>
<td>Adult biography</td>
<td>B HO</td>
<td>duiker, william j</td>
<td>ho chi minh</td>
<td>011250837605 Available</td>
<td>Sarver, Jordan Alexandra</td>
<td>Sarver, Jordan Alexandra</td>
<td>Kenersville Branch</td>
<td>Boost Mobile</td>
<td>f</td>
</tr>
<tr>
<td>8</td>
<td>Adult fiction</td>
<td>FICTION</td>
<td>barth, john</td>
<td>every third thought</td>
<td>011251778141 Available</td>
<td>Prewett, Dorothy M</td>
<td>Prewett, Dorothy M</td>
<td>Clemons Branch</td>
<td>336-945-3627</td>
<td>f</td>
</tr>
<tr>
<td>9</td>
<td>Adult fiction</td>
<td>FICTION</td>
<td>ivey, eowyn</td>
<td>the snow child</td>
<td>011251937451 Available</td>
<td>Seuer, Elizabeth Anne</td>
<td>Seuer, Elizabeth Anne</td>
<td>Reynold Manor Branch</td>
<td></td>
<td>t</td>
</tr>
</tbody>
</table>
You may also use the Filter button to limit the Simplified Pull List by shelving location, call number label, pickup library, etc.

Capturing Holds
Once the needed materials have been pulled from the shelves, they must be captured to fill the holds in Evergreen. On the Circulation Menu, select Capture Holds to automatically print hold and transit slips. Scan or type each barcode and insert the resulting printed hold and transit slips into each item. Holds are also captured when an item that is needed to fill a hold is checked in. Depending on the selections made on your Check In screen, you may need to specify that a hold or transit slip be printed. Place the transit slip inside the item (leaving the destination visible, if possible). Do not tape, paper clip, or otherwise attach transit slips to materials being shipped via resource sharing.

Shipping Work Space
Each hub library needs to designate space to accommodate the process of shipping and receiving consortium materials. There must be adequate short-term storage to collect materials going to other consortium libraries; space for supplies such as packaging tape, boxes, envelopes, and bubble mailers; a flat surface for packing and weighing; and access to an Evergreen-connected workstation. It will be left up to the hub to decide how this is arranged. As additional libraries join the consortium, more storage space will be needed.

Shipping Materials
NC Cardinal does have a supply of polyethylene mailing envelopes and small bubble mailers that may be requested while supplies last. All libraries are encouraged to reuse boxes, envelopes, and mailers whenever possible and within reason. Do not reuse shipping
materials that are in poor condition. Use proper packaging tape to seal boxes and packages, not cellophane or duct tape. Be sure to thoroughly mark out all previous shipping labels.

Acquire an accurate digital postal scale with at least a 50 pound capacity. You will need to include the weight of each package when providing shipping information to UPS.

UPS provides the consortium with plastic shipping label pouches that may be found at the supplies tab on its website. Use them to hold the actual shipping labels printed from on the website. See “Shipping Via UPS” below for details.

WHEN TO SHIP

Some library systems only request one or two items each day, other systems request more. It is best to compile as many items as possible into a single package before shipping but within reason. If there only a few items being shipped to a certain library, wait a few days to see if more items come in for that destination. Do not wait longer than one week to ship. It is recommended that most packages should weigh no more than ??? pounds.

UPS will tend to deliver to each hub library at a fairly regular time of day, depending on the driver’s schedule. All outgoing shipments must be scheduled. You cannot rely on the delivery driver to be able to pick up materials. You can choose to establish a regular pick-up schedule with UPS or you can schedule shipments on an as-needed basis.

SHIPPING VIA UPS

Establishing a UPS Account

To get started with UPS, contact the UPS representative for the NC Cardinal Library to request a new sub-account at least two weeks in advance of your first shipment. All consortial library systems will fall under the State Library’s master account. All rates are negotiated at the state level. All bills are sent to the State Library.

The UPS representative will set up your unique account and send your account number and login information via email. He will also schedule a call with you for a brief introduction to the use of UPS CampusShip, the online shipping tool. During this call, you will be asked about establishing a shipping schedule and you will place your first order of UPS pouches. UPS will provide ongoing support for scheduling shipments and using UPS CampusShip.

Shipping Activities

When you are ready to ship, work with items for one library system at a time, gather all necessary materials and begin your review. Make sure all items being shipped are in good condition, have a transit slip and are going to the correct location. Transit slips are required
even if the item is returning home and there is no hold pending. Verify all audiobooks and DVD cases contain the correct number of discs. Unlock any locking cases. If a note is needed for any reason, use the Resource Sharing Item Note

Use the proper size box for a shipment. Sending a larger than needed box will result in higher costs. Sending multiple small boxes will be more costly than sending one box. When packing a box, take care to protect items by sending full, well-packed and padded boxes with little or no excess space. Partially filled boxes are often crushed in transit. Cushioning materials can and should be reused.

When the box is full and ready to send, use UPS CampusShip to generate a shipping label. Complete all necessary shipping information including the address, number of packages and the weight of each package. In CampusShip, you can save addresses to your Address Book to make shipping quicker and easier. You can also save your Shipping Preferences to define defaults on the shipping screens. When finished, print your shipping label, put it into the UPS pouch and affix it to the box - making sure all other labels and writing on the box have been marked out. You can reprint a label, if necessary, by choosing “View History”.

RECEIVING MATERIALS

Once received, open each package and sort items according to their destination. If the hub library is the destination, check the item in to Evergreen. This ends the transit and makes the item available for placement on the holds shelf or for reshelving, whichever is appropriate. For items going to other locations in your system, do not check the item in. Use your intralibrary delivery system to transport items to their destinations. Items should be checked in only when they have reached their destination library.

ACCOUNTABILITY

Because each library assumes a level of responsibility when borrowing items from other consortium members for its patrons’ holds, it is important to maintain accountability for transited materials. Evergreen does not provide information on the date an item was shipped and UPS only provides a tracking number for a box (but no details about items included). A separate tracking tool is strongly recommended. This may be done in whatever manner each library prefers, but at a minimum, a library should be able to identify where each outgoing item was shipped and a tracking number for the package that contained the item. A simple spreadsheet that contains shipping date, item number, destination library system, and UPS tracking number is adequate. For incoming materials, a similar spreadsheet containing receipt date, sending library system, and item number is sufficient.
LOST AND DAMAGED MATERIALS

Reporting Problems With Received Items
If the item belongs to your library and is being returned in damaged condition, it may have already been damaged when it was sent to the borrowing library or it may have succumbed to normal wear and tear. Treat that item as you would if it had been borrowed by a local patron. If the damage is excessive or pieces are missing, get in touch with the contact person at the borrowing library system to decide how to handle the issue. The item will already have been checked in and will no longer appear on the patron’s record, but the circulation history will reveal who had the item. For missing pieces, a simple phone call to the patron may be enough to resolve the problem.

If the item belongs to another consortium library and is intended to fill a hold within your system but is damaged or missing pieces, determine if it is still acceptable to fill the hold. If so, add a copy note in Evergreen describing the damage and use the Resource Sharing Item Note when returning the item to the owning library system. If the item is not acceptable to fill the hold, there are several possible actions. You may send the material back to the owning library with a “Resource Sharing Item Note” describing the problem and attempt to retarget the hold. If the item is missing pieces, you may call the owning library to see if they have the missing parts. The ultimate goal is get a reasonable quality copy of the desired item into your patron’s hands as quickly as possible.

Bills and Replacements
If an item borrowed through resource sharing is lost or goes missing, it is the borrowing library system’s responsibility to alert the owning library system so that the catalog may be updated. A patron who loses or damages a borrowed item may pay for it at any NC Cardinal library. The money remains where it is paid and is not transferred to the owning library. If the patron elects to replace the lost or damaged item with an exact replacement, it should be sent to the owning library with a clear statement of which item is being replaced. In most cases, the library that receives the replacement copy allows the patron to keep the damaged copy.