



# The MORE the Merrier

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# About MORE

- Resource- and ILS-sharing consortium in western Wisconsin
- 50+ library locations added (and removed) over 20+ years
- Primarily small public libraries
- Regional public library system staff provide administrative and technical support for the consortium

Minneapolis /  
St. Paul



THIS LIBRARY HAS  
**more**

1.5 million choices  
50+ locations  
One card

TRY THE APP!  
Find "MORE Libraries"  
Google Play App Store

# Adding a library location

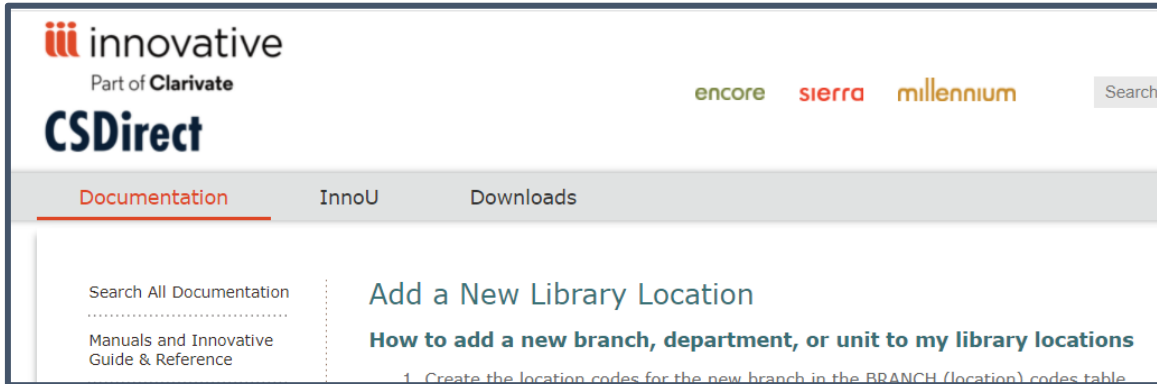
- Stand-alone libraries joining a resource-sharing consortium
- Member library adding a new service outlet or branch
- Consortia-switching



# Understand the Sierra-side process

CSDirect: Add a New Library Location

<https://csdirect.iii.com/documentation/addabbranch.php>



The screenshot displays the CSDirect website interface. At the top left is the 'iii innovative' logo, with 'Part of Clarivate' underneath. To the right are the product names 'encore', 'sierra', and 'millennium', followed by a search box. Below the logo is the 'CSDirect' title. A navigation bar contains 'Documentation' (highlighted with a red underline), 'InnoU', and 'Downloads'. The main content area features a search bar labeled 'Search All Documentation' and a list of links, including 'Manuals and Innovative Guide & Reference'. The primary heading is 'Add a New Library Location', followed by the sub-heading 'How to add a new branch, department, or unit to my library locations'. A numbered list begins with '1. Create the location codes for the new branch in the BRANCH (location) codes table'.

# Benefits of consortium membership

Clearly explain benefits for:

- Patrons
- Staff
- Community

Communicate benefits to:

- Directors
- Staff
- Library boards

1

**more**

Leei Ruhoff, MORE Administrator  
IFLS Library System

2

**About MORE**

- My Online Resource
- A resource-sharing consortium
- Service of IFLS Library System
- Participating libraries fund and share an integrated library system (ILS)
  - Staff with advanced system for circulation, cataloging, and acquisitions
  - Publicly accessible online catalog
  - Database including title, item, and patron records

3

**Patrons of participating libraries can:**

- Check out materials at any participating library with a single library card
- Return materials to any participating library or library drop box
- Search a single catalog for materials from any participating library
- Request materials from any participating library to be picked up at any other participating library

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**Membership**

- 11 member libraries
- 12 other libraries (pending)
- 14 member libraries
- 13 member libraries (pending)

Comment: I was like a kid in the candy store for the first time. I overloaded on the sugar, but now I have learned to have the sugar in smaller doses. I love this site and am recommending it to everyone.

# Membership expectations

## Participation Agreement

- Follow consortium policies and procedures
- Participate in decision-making
- Payment

### **MORE Participation Agreement with IFLS as Service Provider for a Fee**

1/18/08

MORE (My Online Resource) automation consortium is an [IFLS] Library System service in which IFLS area libraries may choose to participate based on this agreement.

# Costs

- Initial
- Ongoing
- Payment schedule

## Cost types

- Organizational
- From III
- Hardware and supplies
- Staff time

**APPENDIX A**  
**One-time Start Up Fee for Membership**  
1/18/08

New MORE members will pay the following:

New member libraries will be charged a one-time start-up fee based on access points. The fee covers a share in the capital cost for MORE equipment and software; the addition of a staff user license package to cover the number of staff workstations; MORE provided staff training; and all MORE produced materials. For purposes of this agreement, the current fee is \$4,500 per access point. The start-up fee may be subject to change as determined by the IFLS Board.

Access points are counted as follows; one for each staff work station\* (each self-checkout station will be considered as 1 staff workstation); one for each four public Internet stations (for purposes of assessing access points, the number of Internet stations will be rounded up—1 through 4

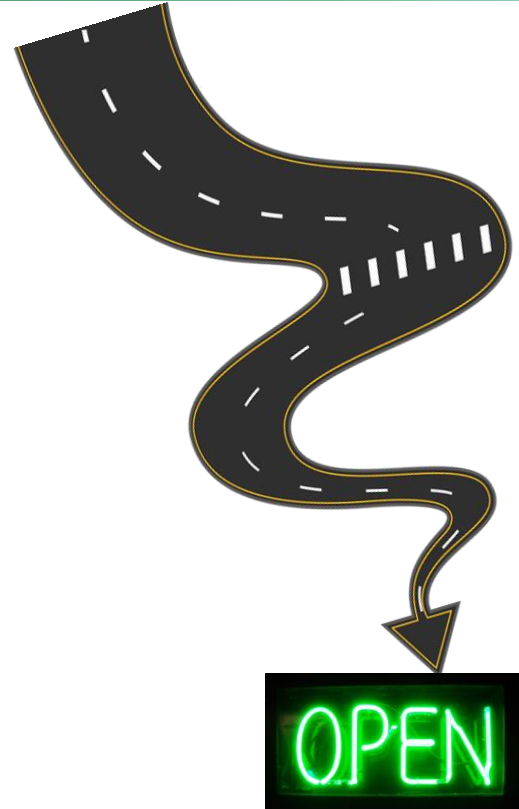
# Process and timeline

How will holdings be added?

- Record loads
- One-at-a-time

When estimating a “go-live” date, account for:

- Communication and approval time
- Library prep
- Sierra set-up
- Adding holdings
- Adding patron records
- Setting public-facing display
- Staff training





# Library Prep

- Location codes
  - Determine number, code, and label
- Call number schemes
  - Pattern for each location code
- Patron types
  - Something needed other than shared Adult and Juvenile?
- Loan rules
  - Length of loan period, fines, renewals, holds, notice schedule
- Loan rule determiner table
  - Match loan rules to itypes
- Sierra usernames for staff
  - Shared vs. personal
- Add staff and director to email lists

1	<b>Library:</b>							
2	<b>Location code</b>	<b>Location name</b>	<b>Call number</b>	<b>Checkout period</b>	<b>Fine</b>	<b>Max fine</b>	<b>Holds?</b>	<b>Renewals?</b>
3								

Library: Augusta					
itype #	Label	Loan rule #	Loan Rules		
			Number	Description	
98	Lucky Day 7 day		540	21 day no fine	
99	Lucky Day 3 day		541	14 day no fine	
100			542	7 day no fine	
101	Rental 3 Day		543	21 day ILL noH noR	
102	Rental 10 Day		544	1 hour PC	
			545	Non circ	

# Sierra tables and settings

## Where the data goes

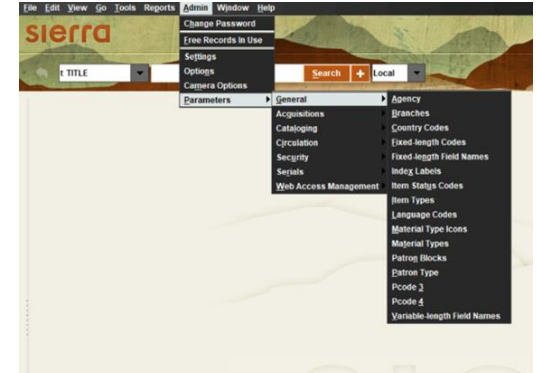
- Add Acquisitions/Serials unit if applicable
- Scoping
- Branch Address
- RLOC and BLOC tables
- Days Closed and Hours Open
- Statistical Group table
- Library Priority
- Patron Blocks (if adding new ptype)



# Sierra tables and settings

## Where the data goes

- Location codes
  - Sierra - Branches table, Hold pick-up locations
  - Admin corner - Locations served, Mapping table
- Patron templates
  - One with appropriate prompts
  - One for each ptype
- Item templates
  - One each for fiction and non-fiction
  - One for each location code



# Adding Records

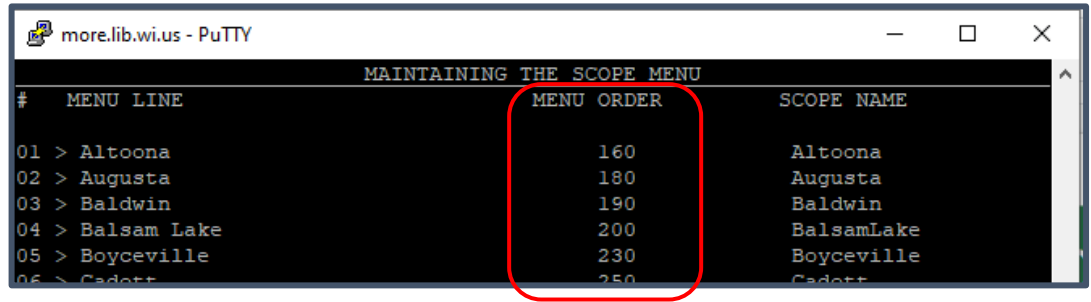
- Items
  - Library adds items one at a time
    - Consortium responsible for new bibs needed
  - Batch load if from a reliable source
- Patrons
  - Library adds patrons one at a time, starting 6 months before go live
  - We've done limited batch loading from school records
  - Technical college will do weekly loads



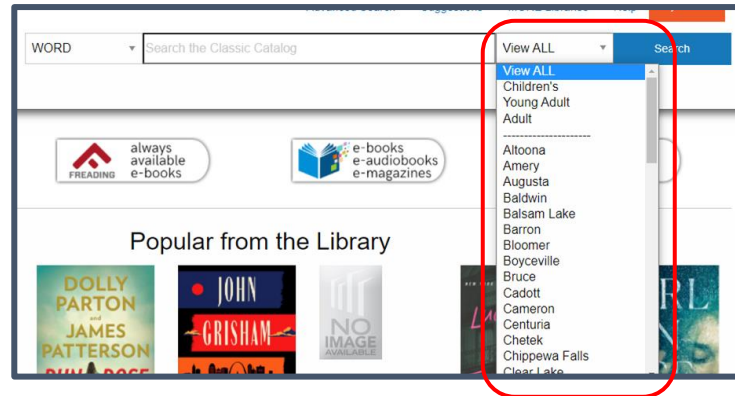
# Discovery/WebPAC and authentication

For public-facing tools, check:

- Holdings display
- Scoping/limiting functions
- Hold pickup functions
- Can patrons of New Location access electronic resources as expected?



#	MENU LINE	MENU ORDER	SCOPE NAME
01	> Altoona	160	Altoona
02	> Augusta	180	Augusta
03	> Baldwin	190	Baldwin
04	> Balsam Lake	200	BalsamLake
05	> Boyceville	230	Boyceville
06	> Cadott	250	Cadott



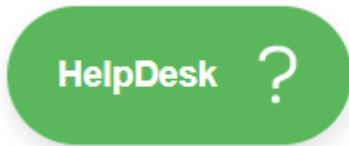
# Training

- Adding items
  - Start when membership is confirmed and all system settings done
  - How to find a matching record
  - Item templates, choosing and using
- Adding patrons
  - Patron template/s
  - Cheat sheets for codes
- Circulation
  - Basic check in / check out
  - Holds
- Statistics and admin reminders
  - Statistical tools
  - New membership responsibilities



# Going live

- Publicity to the local community
- Notify other consortium members, update consortium lists
- Provide onsite support on “go live” day if possible
- Connect staff with ongoing support



# MORE documentation

To see our MORE Participation Agreement and the attendant Appendices, see:

: <https://www.ifls.lib.wi.us/knowledge-base/more-policies-and-participation-agreement/>

They are on the bottom half of that screen.

If you are interested in a presentation we made to a library board considering joining our consortium, listing the benefits of membership, see:

<https://docs.google.com/presentation/d/1g6tLYSqInTFYCE9ru57RZwTK65hiEwEfU01c1Dob1HE/edit?usp=sharing>

The name of the library and appropriate statistics are customized to the library we are working with.





# THANK YOU

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# Tips for an Accessible Presentation

## While presenting:

- Be visible when speaking. Seeing your face can help participants hear and understand better.
- Use a microphone. Even in a small space, some people may need audio electronically. If you ask, “Can everyone hear me?”, some people may be uncomfortable identifying they cannot. If possible, encourage participants to use a microphone to ask questions. If this is not available, repeat questions through your microphone.
- Describe visual information. For example, if you have an important chart or image on your slide, describe the key points. Or, if you ask participants to move in some way (i.e. “raise your hand if you have been to IUG before”), describe the response (i.e. “Okay, that seems like about half of you!”).