

Minutes of the Meeting of the MOBIUS Access Advisory Committee

April 24, 2001,

MOBIUS Consortium Office, Columbia, MO

Those Present: Judy Fox, Washington University, Chair

Loretta Ponzar & Carol Warrington, Archway; Joni Blake, Arthur; Ellen Eliceiri, Bridges; Gordon Johnson, Galahad;
Sharon Upchurch, LANCE;

Mary Jo Barbush-Weiss & June DeWeese, MERLIN; Jim Mulder, Northwest;

Linda Medaris, Quest; Gaye Pate, SWAN; Scott Britton, Washington University; Elise Fisher, WILO

Robin Kesohl, Gary Harris, and Mark Wahrenbrock; MCO

The Chair reminded the committee that we will elect a new chair at the first meeting after July 1. Also, odd numbered clusters (Quest, LANCE, SWAN, Bridges, Archway and Washington Univ.) should appoint new representatives to take office July 1.

1. Implementing the Lost Book Policy

Loan rules for *MOBIUS Patron Circ* and *MOBIUS Inst Circ* (in the loan rule table in the 400s) will need to be changed. The changes in both will be the same:

- line 10 > *MINIMUM USE* should be changed from 38 to 21[days]
- line 15> *TIME FIRST OD* should be changed from 3 to 5 [days]
- line 16> *TIME SECOND OD* should be changed from 0 to 25 [days]
- line 17> *TIME THIRD OD* should be changed from 0 to 15 [days]
- line 21> *TEXT FIRST OD* - 203 should be revised to match the text agreed upon in the Lost Book Policy.
- line 22> *TEXT SECOND OD* - a new text line will need to be created to accommodate the agreed upon text for the second message.
- line 41> *DEFAULT ITEM COST* should be changed from \$120.00 to \$100.00
- line 42 should remain the same at zero
- line 43> *REPLACE BILL SERVICE CHARGE* should be changed from \$0.00 to \$20.00
- line 46> *MSG BILL* - 204 should be revised to match the text agreed upon in the Lost Book Policy.

The LSO will make the changes in each cluster's loan rule table.

The change in the text of the INN-Reach hold cancellation notices as suggested by the Arthur cluster was adopted.

Jim Mulder of Northwest wanted to verify that INN-Reach bills will always be the default \$120.00. In bills printed within each cluster system, the price from the item record will override the default. Robin Kespohl responded that all INN-Reach bills will indeed be \$120.00.

Each institution will need to finalize its lost item list in time for the August reconciliation. MERLIN has been using a workaround devised by Janine Orrison of the LSO to create lists of overdue and billed items borrowed by INN-Reach patrons. Judy Fox will write a procedure for creating a final lost item list.

2. Maximum Requests in INN-Reach

Members liked that the draft proposal allowed flexibility for borrowing libraries to decide how much liability they were willing to risk, and that it could be decided at the institutional rather than the cluster level.

There was some discussion of MOBIUS p-types and stats. LSO maps local p-types to INN-Reach p-types. MCO staff will create one new MOBIUS p-type for undergraduates allowed 20 checkouts. That will be number 206 > UNDERGRADUATE 20. Number 204 will be changed to UNDERGRADUATE 10. More p-types may be created if needed. Gary Harris will e-mail the p-type mapping file to members and p-types may be found in each cluster's shared

system. The numbering for the MOBIUS p-types will be the same in each system.

Members agreed to accept the proposal as drafted.

3. Book bands and instructions for completing them.

There has been a problem with addresses on both bookbands and Lanter delivery bags. If only the institution is on the bookband, it may be routed to the wrong library, so we need to be sure that the *pickup location* is on the bookband. Everyone needs to be cautious of abbreviations. Is LU Lincoln or Lindenwood; is MU University of Missouri or Maryville? Spell it out, or be sure it is unambiguous.

Everyone also needs to be more careful to use the proper Lanter label. This is a particular problem for Archway and WILO. Often the wrong labels are used when there is more than one campus for a single institution. After some discussion, members decided that with gentle reminders to staff and a little more care we could get books to the right location.

To summarize:

- WRITE THE *PICKUP LOCATION* ON THE BOOKBAND
- SPELL IT OUT; ABBREVIATE CAREFULLY
- PICKUP LOCATION *is not equal to* LANTER DELIVERY LOCATION
- BE SURE THE LANTER DELIVERY LABEL IS CORRECT FOR THE PICKUP LOCATION

Suggested changes in the MOBIUS bookband will be agreed on by e-mail; and when agreed on, may be implemented as supplies run out of current bookbands.

4. Encouraging/Requiring Patrons to use MOBIUS instead of ILL.

Some campuses felt they could not spare the staff time required to move ILL requests to MOBIUS. Some campuses return ILL requests to patrons if items are available in MOBIUS, some place the holds in MOBIUS for items requested through ILL by their patrons. At least one campus fills ILL requests for local community members who are not allowed to use MOBIUS.

Because circumstances are different on different campuses, it was decided that we could not require the use of MOBIUS instead of ILL. It was agreed that everyone should encourage the use of MOBIUS. There were various suggestions for encouraging the use of MOBIUS by publicizing it locally on library web pages, in library newsletters, by putting slips in ILL books from MOBIUS institutions, etc.

Members agreed to revisit the issue after all clusters are up and running.

5. Procedures for Damaged Books.

There is some confusion about what is supposed to be the online damage report form for reporting items damaged by Lanter. It seems to be either a request form to request the damage report form from the driver, or some sort of trick. Scott Britton of Washington Univ. reported that when Lanter was called, he was told that he needed to get a form from the driver, but the driver had no idea what he was talking about.

As it stands, Scott has not yet received any forms, still has the damaged book, no reimbursement and the news from Lanter is that the claim has been resolved. Elise Fisher of WILO has had similar problems with books damaged by Lanter.

Robin Kespohl will check to see if MCO has the proper forms and requests that damage by Lanter be reported to both Lanter and the MCO. She will also follow up with Lanter on the items discussed at the meeting.

Payments for items damaged by patrons should be negotiated between libraries.

6. Request Balancing Table

Until now, the request balancing table had been set with MERLIN at 99 and all other clusters set at one, so most

requests would go to MERLIN. Members agreed to even out the table so that all clusters that have been up and running for six months or longer are now set at 50. WILO is the only cluster now up that is still set at one. Lance will come up on June 18, and will be set at one for the first six months. It was agreed that we would look to see what effect this change has had in three months and then again in six months. We will decide then if we need to make any changes.

Other Business

Robin Kespohl asked that we go over the enhancement requests found at http://libweb.uoregon.edu/orbis/staffhome/enhance_req.2001proposed.htm so that she and Gary can vote according to the committee's choices at the Innovative User's conference in May. Members chose eleven: #01, #02, #08, #10, #14, #15, #18, #23, #24, #27 and #30. *

Gary Harris gave an MCO update. He went to Innovative's offices in Emeryville April 19th and 20th. He made two presentations to III staff explaining MOBIUS and clusters using a shared system environment, so that they could better understand our questions.

He also met with Sandy Westall and other company officers. They discussed development of the Web Access Management module, exploring the possibilities of a Metafind search engine to search the INNOPAC where electronic resources are available to search across databases, and resource linking so that a subject search in the catalog will also search for matches among the e-resources.

Release 2001, containing phase 4 of Millennium Circulation, will be available in 4-6 weeks. This release features a streamlined request function for INN-Reach which will consider all other available copies if the first copy is not available. They are just starting work on the distance learning module which will allow for the "pick-up anywhere" option. Printing shared system notices in INN-Reach should be ready by phase 5 of Millenium Circulation for release later this year.

The next meeting will be on July 24, 2001.

Respectfully submitted, Mary Jo Barbush-Weiss, Recorder.

*See Enhancement Request Proposals detail below **

**Enhancement Request Proposals, April 2001 Patron Online Borrowing and Visiting Patron Enhancements Agreed on by MAAC 4/24/01

2001 Circ 01	Requesting: ID encryption <i>also see 2001 Gen01</i>	When authenticating users for online borrowing, secure patron information by the use of secure socket layer (SSL) or by some other means of encryption.	1999	OhioLINK 2001: Ohio- LINK, Maine, Cascade, MOBIUS	3
2001 Circ 02	Requesting: screen design	Ability to customize the INN-Reach request screen. More flexibility is needed for creating customized messages or options without having to ask III to implement. -- <i>Gary Harris</i>	2001	MOBIUS	2
2001 Circ 08	Requesting: Request balancing within an Institution	The balancing table only impacts the choice between systems [i.e. INN-Reach site, based on Institution code, or INN-Reach site]. The balancing table does not impact the choice between items owned by one library in a shared system. When there are multiple items owned by the same system and that system's items are to be selected (based	2001	MOBIUS	3

		on the balancing table), the system chooses the first available item as the items are stored on the central system. This should be changed so that the selection within a system should be random among holding libraries on the shared system. -- <i>Gary Harris</i>			
2001 Circ 10	"Received" status - Improve patron notification	When an INN-Reach item is received its status should be incorporated into the local hold queue so that patron notices are delivered according to local practice (e.g. mail delivery, email, telephone notification). -- <i>George Machovec</i> . MOBIUS: INN-Reach items should have a hold notification similar to the hold notices that are printed for the regular (INNOPAC) III hold or paged books. Currently, we have to cut the paging slip in half and send the bottom half of the paging slip as the patron notification once the item arrives at the patron's library. We would like to see this be automatically queued in the hold notice printings.	2001	Prospector, MOBIUS, PLUS	1
2001 Circ 14	Overdue notice: Print library name	Show originating library (not just system code) on overdue notices. This is particularly important for multi-library sites that are all represented by a single 5-character code. <i>note: Mobius and Maine join the request, as highest priority</i>	1999	OhioLINK 2001: Cascade, Maine	1
2001 Circ 15	Checkin: "in transit" to appropriate circ desk	When checking in for patron hold and the item is at the wrong circ location, leave the status as in transit and indicate on the screen where to send the book.	1999	OhioLINK 2001: OhioLINK, Cascade, MOBIUS	1
2001 Circ 18	Reports: Holds Management Report	Offer a holds management report similar to the standard circulation report. The [local INNOPAC] circulation holds management cluster lists all patrons with outstanding holds and the status of each item (in transit, on holdshelf, available, etc.) Patrons that have INN-Reach holds do not appear on the list. There is no comparable list or easy way to track those holds. <i>Gary Harris</i>	2001	MOBIUS	3
2001 Circ 23	Reports (Status): Returned Too Long	Add to Returned Too Long report: a. Patron info: add home library b. Owning Site: in addition to Instn Code, add local LOC CODE c. Title: increase length from 25 to 30 or 35 characters <i>Gary Harris</i>	2001	MOBIUS	1
2001 Circ 24	Overdue notices, send by Location (for shared systems)	Print or e-mail overdue notices by location for shared systems, based on location code(s) and home library code in patron record. <i>Gary Harris</i>	2001	MOBIUS	1
2001 Circ 26	Visiting Patron on-the-fly checkout	Simplify checkout of item not in database to allow prompting for on-the-fly bib and item records.	2000	Orbis; 2001: Orbis	3
2001 Circ 27	Visiting Patron: statistics	Count # of checkouts made in Visiting Patron module, reflected in a table to show Owning Site (where VP checkout occurs) and Patron home library. Ideally, also provide report further stratified by <i>owning library</i> within a shared system. <i>Gary Harris</i>	2001	MOBIUS	2
2001 Circ 30	Management Info (Statistics) - Web Mgmt Reports for	Break down request and fulfillment data for multiple institutions and libraries that share an INNOPAC system. -- <i>Pam Moffeld</i>	2001	Cascade	1

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