

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group; N/A
Revised: 02/11/2011
Replaces: N/A

Purpose of the procedure: How to process books for local patrons

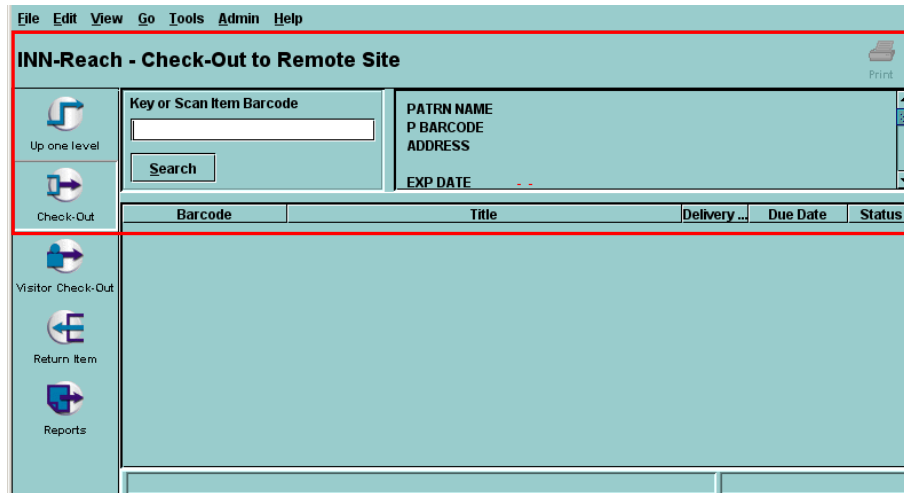
Background: N/A

Content of the procedure:

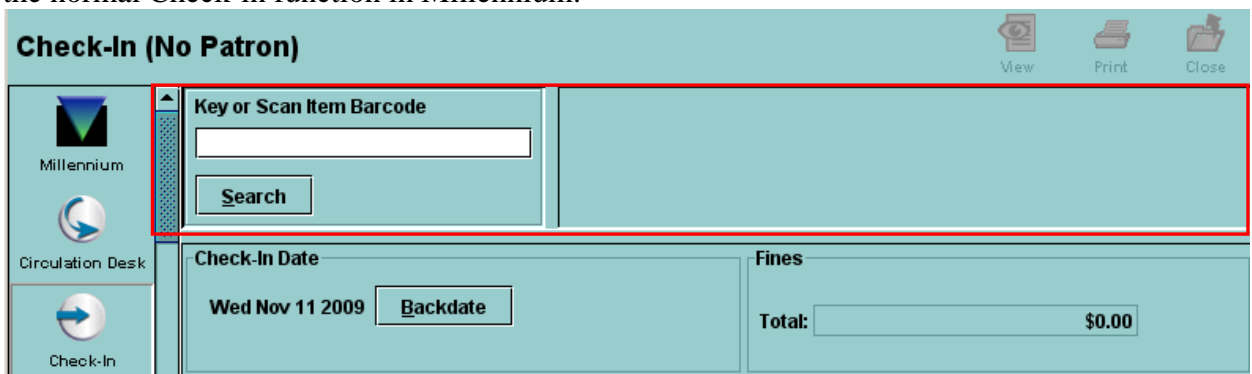
1. Patron places a hold on an item in the MOBIUS union catalog.
2. The lending library prints the paging slip, retrieves the item, and in Millennium the check-out is done using the INN-Reach mode:

The screenshot displays the 'Circulation Desk' interface. On the left sidebar, the 'INN-Reach' button is highlighted with a red rectangle. The main area features a search bar with a 'Search' button and a form for 'PATRN NAME', 'P BARCODE', and 'ADDRESS'. Below this, there are tabs for 'Fines(\$0.00)', 'Check In (0)', 'Bookings(0)', 'ILL(0)', and 'INN-Reach(0)'. The 'INN-Reach(0)' tab is selected, showing a 'Check Out' section with a 'Checked-Out Items(0)' table and 'Holds(0)' section. Buttons for 'Add Message' and 'Change Due Date' are visible.

The item is processed using the INN-Reach Check-Out to Remote Site which checks it out under an institutional loan rule. A green book band is placed on it and it is then sent to the borrowing library by the courier.



3. The receiving library receives the items from the courier. They can be checked in using the normal Check-in function in Millennium:



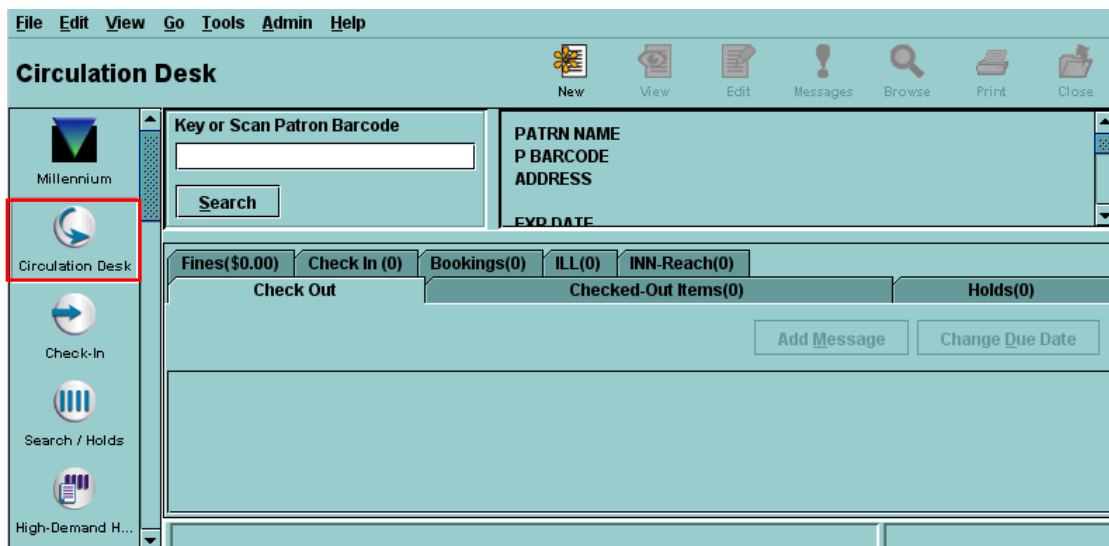
You will receive the message "Item status is IN TRANSIT and has been cleared. Press space to continue. The barcode will be displayed with the message MOBIUS RCVD.

Possible Errors:

The barcode is not read or understood by the barcode scanner: Type "b" and scan or type in the barcode. You will receive a message saying the barcode was found with the site code at the end. An example for MERLIN (6mrln) is: "Barcode 123456789 was found as 1234567896mrln. Continue using record for 1234567896mrln (y/n)". Choose "y".

The barcode is not found: If the barcode is not found, see procedure 1-7, Processing Problem Books Received from Other MOBIUS Libraries.

4. The receiving library usually sends an automated pickup notice as part of the morning notices that are printed, which tells the patron the book is available. The library can also contact the patron directly if needed.
5. The book is checked out to the patron. This is done using the normal Check-Out function in Millennium.



A message will display "Item has status MOBIUS Received and has been cleared". The title, barcode, and due date will be displayed. Stamp or write the date on the green book band.

Compliance: N/A

Forms: N/A

Related documents: N/A

Created by: MAAC

Adopted: DRAFT, pending

Effective date: Pending

Reviewed: Pending

Revised: Pending

Replaces: None, new document

Purpose of the procedure: To provide a process and background information on how members can change the INN-Reach borrowing limits for their patrons.

Scope: The procedure will be used by MOBIUS members for information and understanding the process.

Background: As originally set up MOBIUS had three tiers of borrowing limits as 10, 20, and 30 items. These were labeled as undergraduate, graduate, faculty and staff. There was never an established requirement that undergraduates or graduates had to follow any particular limit, and over time have lost most relevant meaning. In addition it was also not clear when/how members could change limits. On Feb. 23, 2011, MAAC voted to simplify the Ptype naming structure as 10, 20, or 30 users, and allow members to select which borrowing limit they preferred.

Only two things would be change:

1. The labels for the INN-Reach Ptypes would be rewritten as generic 10, 20, and 30 user.
2. The process for changing borrowing limits would be specified.

Responsible party: MAAC, review as needed.

Content of the procedure:

Each group or class of patrons is designated by a Ptype. At the cluster level each school keeps a list of Ptypes for their patrons, such as graduate students, faculty, staff, etc. The loan rules and borrowing limits are mapped to each Ptype and allow different types of privileges depending on the patron's classification. Usually faculty and staff have longer loan periods and higher borrowing limits than undergraduates, and so on.

At the INN-Reach (MOBIUS) level the server handles the different Ptypes from all the clusters by mapping them to a handful of Ptypes on the server itself. For example, all the Ptypes that have been decided to have a borrowing limit of 10 items will map to a single Ptype with a 10 item limit. These Ptypes also have uniform loan rules on each cluster.

A master list of the Ptype mapping can be seen here:

<http://mobiusconsortium.org/node/5692>

Each school can decide on their own which of the three borrowing limits (10, 20, or 30) to assign to each of their Ptypes, and can change these as needed without cluster or MAAC approval.

Requests for changes can be submitted to the MOBIUS Help Desk.

(help@mobiusconsortium.org)

Limits:

MOBIUS Items with holds and items returned but not checked in count against the total borrowing limit.

MOBIUS items are also counted against a local cluster hold limit. For example, if a patron has an INN-Reach borrowing limit of 30 but a local hold limit of 10 they will be able to check out a total of 30 items but not have any more than 10 outstanding holds/returns at any given time.

To request a higher limit than 30 will require presenting the proposal for discussion to MAAC.

Training: No additional training is required.

Forms:

The forms used are the:

Damage Report Form

Circ and ILL Contact List

MOBIUS Damage Claim Form

Related documents: No additional documents are required.

Created by: MOBIUS Access Advisory Group
Approved: MOBIUS Access Advisory Group; N/A
Revised: 02/11/2011
Replaces: N/A

Purpose of the procedure: Several reports are available to track INN-Reach requests. These reports can be used to identify requests which have not been processed properly. The reports must be shared among clusters because a report generated at one cluster may represent a problem which occurred at a library in another cluster. All reports are available in Millennium Circulation.

Background: This procedure will be used by MOBIUS members to track the status of the items they borrow and lend in order to recover the material or fines on a timely basis.

Responsible party: MOBIUS Access Advisory Group

Content of the procedure:

Refer to **“3-6 Producing Inn-Reach Reports”** (<http://mobiusconsortium.org/node/5217>) for instructions on accessing MOBIUS and Inn-Reach reports in Millennium Circulation Module.

Name of Report	Status	Symbol	Parameters	Created by MCO	Created by local library	Done by owning/borrowing library
Reports Produced locally at each library and by MCO						
Paged Too Long	MOBIUS Paged	(Paged status more than 3 days	1 st and 15 th	Weekly	Owning
Requested Too Long	Requested	&	Request status more than 3 days	1 st and 15 th	Biweekly	Borrowing
In Transit Too Long	In Transit	t	In transit from owning library more than 7 days	1 st and 15 th	Biweekly	Borrowing
Received Too Long	MOBIUS Recvd	#		1 st and 15 th	Biweekly	Borrowing
Reports Produced by MCO only						
Institutional Overdues	N/A	@	Overdue 45 days	1 st and 15 th	N/A	N/A
Returned Too Long	MOBIUS Rtd	%	Returned status more than 21 days	1 st and 15 th	N/A	N/A

Reports Produced Locally at Each Library and by the MOBIUS Consortium Office

PAGED TOO LONG REPORT

1. This is a list of items with paged status for more than 3 days. This report represents items that have been paged at the owning cluster/library but not filled.
2. Determine why the items have not been sent. If the item is not available, cancel the request or transfer it to another library in your cluster.
3. For items that are missing, change the status to the appropriate code so other patrons will be blocked from requesting the item.

REQUESTED TOO LONG REPORT

1. This is a list of items with MOBIUS REQUEST status for more than three days. This list represents items the library's patrons have requested that haven't been processed by the owning library.
2. Search the MOBIUS catalog to determine the library to which the request was sent (the cluster name is on the report). If the book is checked out (i.e. has a due date) and also indicates a hold, assume the patron knew the book was checked out and is willing to wait for it to be returned.
3. For items that don't indicate they are checked out, contact the owning library to determine the status of the request.
4. If the owning library cannot fill the request, the owning library should either cancel it or transfer the request to another library in its cluster.
5. Item requests for over 3 months should be examined to determine if the hold should be cancelled based on local library policy.

IN TRANSIT TOO LONG REPORT

1. This is a list of items in transit too long. This represents items in transit from the owning library to the patron's library for more than 7 days.
2. Check the local hold shelves to see if the item was placed on the shelves without being checked in. If so, check in the item.
3. If the item is not on the hold shelves, it could indicate a lost or misplaced package or an item that was given to the patron without being checked in or checked out.
4. If the item is not on the hold shelves, it may never have been delivered by the courier. Contact the loaning library to have them track the item. If the courier's records indicate the book was received by the borrowing library, the library is responsible for the lost book.
5. The lending library is responsible for addressing the problem within 6 months of the date of transit.

RECEIVED TOO LONG REPORT

1. This is a list of items with MOBIUS REQUEST status for more than seven days. It lists items which have been checked in by the patron's library but not checked out to the patron.

2. Check the hold shelves to see if the book is still on the hold shelf. If found and the local policy is to notify patrons twice, notify the patron again that the book is being held. Indicate on the hold slip the date of the second notification. If it is 5 days beyond the second notification, use the "Return unwanted INN-Reach items to Owning Library" option on the INN-Reach functions menu to indicate the book is being returned. Cross through the TO: address on the green book band and circle the RETURN TO: address. This will be the address of the owning library. Return the book via the courier delivery service.
3. If the book is not on the hold shelf, it was probably not checked out to the patron properly.
4. If an item is on the Received Too Long report for more than one month, further investigation will be necessary.

REPORTS PRODUCED BY THE MOBIUS OFFICE

Refer to "Producing Inn-Reach Reports" for instructions on accessing MOBIUS and Inn-Reach reports in Millennium Circulation Module.

INSTITUTIONAL OVERDUES REPORT

1. On the first and fifteenth day of the month, or the first business day thereafter, the MOBIUS Office will generate a list of the institutional overdues reports for all locations for items overdue at least 45 days. The report should be sorted by Item Location. The report is available in Millennium Circulation. Each library should check in the stacks for the items it owns by the end of the month to clear any errors before the report by Patron is produced.
2. On the first working day of each month the MOBIUS Office will generate the institutional overdues report for all locations for items overdue at least 45 days. The maximum number of days overdue should be left blank and the list should be sorted by patron institution and name.
3. Each library will need to review lists created on other cluster catalogs. The lists produced represent items owned by the cluster producing the report which are overdue from patrons of other clusters.
4. Each institution is responsible for contacting their patrons with overdue materials to try to get the books returned. If books are not returned within a week of this notification, *the patron's library is responsible for blocking the patron from further MOBIUS activity.*
5. The patron's library will inform the owning library about the status of the overdue items (e.g. lost, claims returned, trying to contact patron, etc.). The patron's library may collect fees from the patron at any time and may reimburse the owning library at any time. The owning library should be reimbursed no later than 18 months after the due date.
6. The owning library may want to suppress the item record from public display during the period it is waiting for the book to be returned or paid for. DO NOT check-in the book, change the circulation status, or issue a "claims returned" because this will remove the necessary tracking information.

RETURNED TOO LONG REPORT

1. This is a list of old RETURNED items with MOBIUS RET status for more than 21 days sorted by date. The report is available in Millennium Circulation. Each library will need to review lists created on other cluster catalogs. The list represents items checked in by the patron's library but not checked back in by the owning library.
2. When a list is printed from other clusters, follow the steps listed below:

- a. Items from home library: Access the local catalog and record the call number for these items.
- b. Search the stacks for locally owned items that are still listed as checked out in the local catalog. If the item is found, check it in to clear the records.
- c. If the item is not found, send a note to the patron's library asking staff to search their stacks to make sure the book was not accidentally re-shelved in the patron's library collection. If found, the patron's library should return the book to the owning library. If not found, the patrons' library should notify the owning library that the book was not found.
- d. If the book is not found in either the owning or patron's library, the owning library should send a note to the circulation list(s) asking other libraries to check their shelves.
- e. Items from another library: If the item indicates a status of not checked out in the owning library catalog, the virtual item record can be deleted from the patron's record. Deleting the virtual item record will clear the item from the Returned Too Long report. Virtual items should only be deleted when the owning library catalog indicates the book is not checked out.

These items can be deleted one of two ways:

Option 1: Borrowing library -- Removing item from the patron's record

- Open the patron's record
- Open the INN-Reach tab
- Right-click the item
- From the menu, select "Delete Virtual Item." Confirm that you want to delete

Option 2: Lending library -- Removing item from the Returned Too Long Report

- Open the Returned Too Long Report
- Select the item you want to delete
- Chose the Remove button or right click and select "Remove Item."
- Chose Yes to delete

3. For books not found after 1 year, the patron's library is responsible for reimbursing the owning library for the book.

Compliance: N/A

Forms: N/A

Related documents:

1-9 Damaged by Courier Claim Procedure
<http://mobiusconsortium.org/file/7136/download/9621>

2-4 Lost Books
<http://mobiusconsortium.org/file/967/download/1438>

3-6 Producing Inn-Reach Reports
<http://mobiusconsortium.org/file/971/download/1449>

Created by: MOBIUS Access Advisory Group
Approved: MOBIUS Access Advisory Group; N/A
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Replaces: N/A

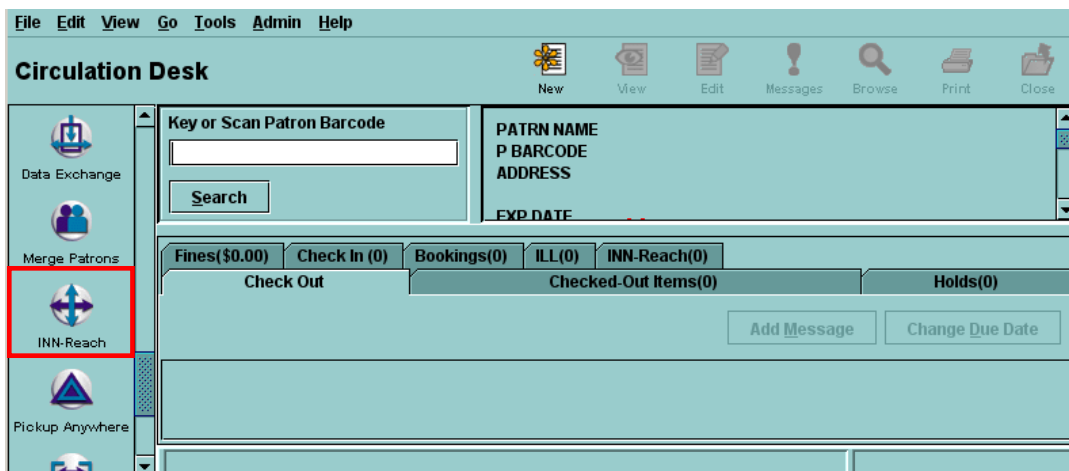
Purpose of the procedure: Details how to process expired PUA/INN-Reach holds on books.

Background: N/A

Responsible party: MOBIUS Access Advisory Group

Content of the procedure:

1. For both MOBIUS and PUA books the default pickup time on an INN-Reach loan rule is 10 days. Each library determines the length of time it wants to hold books for patrons after they are notified, not to exceed 10 days. If the patron does not pick up the item within that time period it is up to the library to decide whether to notify the patron again that the book is being held. If a patron has not picked up the book within the time limits defined by the local library (≤ 10 days) **or** the INN-Reach loan rule (10 days), the book should be returned to the lending library. Failure to return the book within that time period can result the book becoming overdue on the institutional checkout from the home library.
2. To return a MOBIUS item follow the steps below:
 - a. In Millennium select the "INN-Reach" mode.



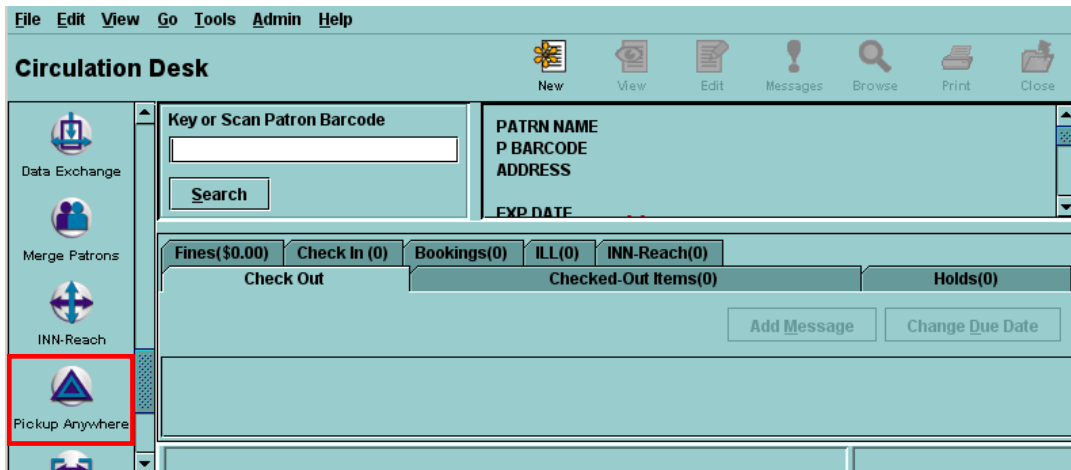
- b. Next, select “Return Item.”

The screenshot shows the 'Circulation Desk' software interface. On the left sidebar, the 'Return Item' button, which features a blue 'E' icon, is highlighted with a red rectangular box. Other buttons in the sidebar include 'Up one level', 'Check-Out', 'Visitor Check-Out', and 'Reports'. The main window has a menu bar (File, Edit, View, Go, Tools, Admin, Help) and a toolbar with icons for New, View, Edit, Messages, Browse, Print, and Close. The main area contains a search section with a text input field and a 'Search' button. Below this are tabs for 'Fines(\$0.00)', 'Check In (0)', 'Bookings(0)', 'ILL(0)', 'INN-Reach(0)', and 'Holds(0)'. The 'Check Out' tab is active, showing a 'Checked-Out Items(0)' section with 'Add Message' and 'Change Due Date' buttons. A right-hand panel displays fields for 'PATRN NAME', 'P BARCODE', 'ADDRESS', and 'EXP DATE'.

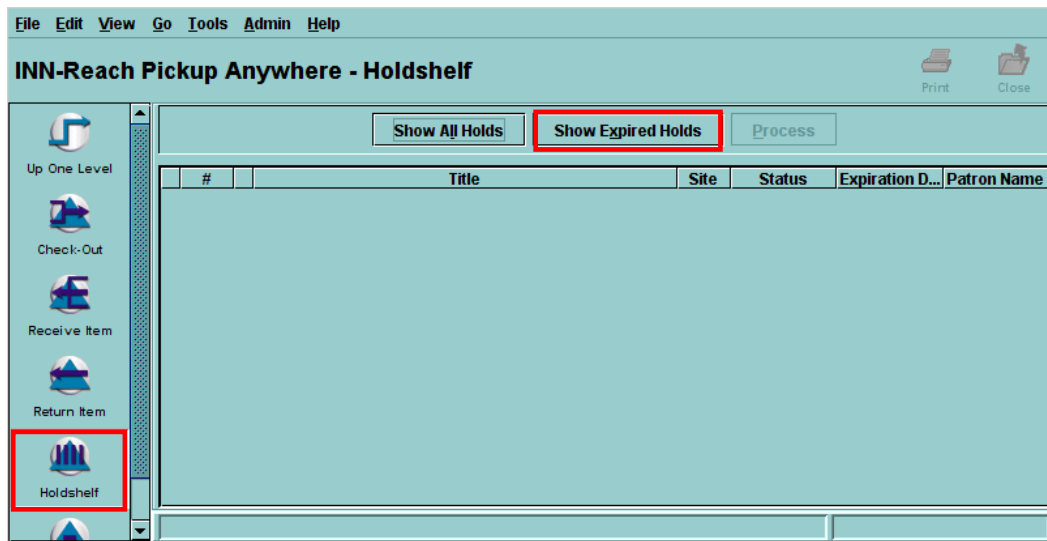
- c. Key or scan in the item barcode.
- d. Check-in each book that needs to be returned.
- e. On the green band cross out the TO: location and circle the RETURN TO: location in marker.
- f. Return the books to the lending library via the delivery service.

3. To return a PUA item follow the steps below:

a. In Millennium select the “PUA” mode.



b. Next, select “Holdshelf” and then “Show Expired Holds.”



c. Select (checkbox) each hold to clear and then press “Process.”

d. On the salmon band cross out the TO: location and circle the RETURN TO: location in marker.

e. Return the books to the lending library via the delivery service.



1-3 Expired Holds

Compliance: N/A

Forms: N/A

Related documents: N/A

Created by: MOBIUS Consortium Office
Adopted: MOBIUS Access Advisory Group; 9/28/2009
Revised: 10/29/2010, 2/11/2011
Replaces: N/A

Purpose of the procedure: Millennium Offline Circulation (MOC) is a PC-based application that enables libraries to continue with limited automated circulation functions (checkout, check-in, renewal, and patron registration) in the event the Millennium server is down or becomes unavailable.

Background: N/A

Responsible party: MOBIUS Access Advisory Group, reviewed as necessary

Content of the Procedure: The MOC application and the information from these functions are stored on the PC's hard drive in the C:\\Millennium\\ folder. If you are experiencing extensive downtime on your network, you may want to backup the files periodically. MOC may be used simultaneously on multiple PCs within the library.

NOTE: When you begin a MOC session, you must notify the MCO Helpdesk and the other members of your cluster

Set Up for Millennium Offline Circulation

1. Download and install the appropriate version (**offline160_02.exe**) for Rel.2009 from CSDirect. (http://csdirect.iii.com/downloads/offline_circ.shtml)
2. In MOC, from the **View** menu, select **Preferences**. MOC displays the Preferences dialog:
 - a. Enter your library's **circulation statistics group number** (Millennium Circulation, Admin, Parameters, Circulation, Group Statistical Maintenance).
 - b. Enter the date format **mdy**.
 - c. Uncheck the barcode validity check. It will not work properly on a multi-library system.
 - d. In the **Patron Registration Settings** table, enter the corresponding Innovative tag in the Tag column for each patron field for which you want to be prompted during patron registration. MOC automatically generates prompts for the following tags (italicized tags should be required by all):

Tag	Prompt	Tag	Prompt	Tag	Prompt
0	P TYPE	6	Manual Block	p	Phone 2
1	PCODE1	7	Expiration Date	t	Phone
2	PCODE2	a	Address	d	Dept
3	PCODE3	b	Barcode	u	Unique ID
4	Home Library	h	Address 2		
5	Patron Message	n	Name		

- e. In the Default column enter any default text such as a default patron type, or "Offline Patron" in the Patron message. Millennium Offline Circulation does not accept defaults for "Name," "Telephone 2," or "Telephone." If you enter a default for Barcode, when you create a new patron record, you can add to the default, but cannot modify it.
- f. After you enter a tag and its corresponding prompt or default, press **Enter** or select another row in the Patron Registrations Table. MOC does not register entries until you remove focus from their row. MOC automatically lowercases any uppercase tags that you enter.
- g. To write your changes to the **pccirc.cfg** file, choose the Apply button. Note that the system will not retain your changes unless you chose the Apply button. Choose the **Quit** button or close the window to exit the Preferences dialog.
- h. To ensure that all of the library's PCs are configured with the same Offline Circulation settings, you may copy the **pccirc.cfg** file to a disk or network. Before copying the file, make sure that MOC is not running. The default directory for the pccirc.cfg file is **c:\Millennium**.

Checking Out Items

1. Start MOC and change to MOC's **Check-Out** mode.
2. MOC prompts you to enter the patron's barcode. **Key or scan** the patron's barcode and press **Enter**.
3. MOC prompts you to enter the due date for the items that you will check out to the patron. **Key** the due-date in the format specified in the Preferences dialog and press **Enter**.
4. MOC asks you whether it should use an hourly loan rule for the items that you will check out to the patron. **Key 'Y' or 'N'** to indicate whether you want to use an hourly loan rule and press **Enter**. If you keyed 'Y,' MOC prompts you to enter the time the item is due. Key a whole number from **0 to 23** (military time) and press **Enter**.

5. MOC prompts you to enter the barcode for each item that you are checking out to the patron. **Key or scan** the item barcode and press **Enter**. MOC records each check-out in the **circ.dat** circulation file.

Note: Continue to scan item barcodes for the same patron if there no change in the due date is required. If a change in the due date is required, go to step 6 and proceed as if there is a new patron.

6. When all items have been checked out to the patron, choose the **Clear Patron** button. MOC prompts you to enter the next patron's barcode.

Checking In Items

1. Change to the **Check-In** mode.
2. MOC prompts you to enter the item's barcode. **Key or scan** the item's barcode and press **Enter**.
3. Continue entering item barcodes. MOC writes each check-in to the **circ.dat** file. Using the **Clear** button does not erase the transactions from the circ.dat file.

Renewing Items

1. Change to the **Renew** mode
2. MOC prompts you to enter the patron's barcode. **Key or scan** the patron's barcode and press **Enter**.
3. MOC prompts you to enter the due date for the items that you are renewing. **Key** the due-date in the format specified in the Preferences dialog and press Enter.
4. MOC asks you whether it should use an hourly loan rule for the renewals. **Key 'Y' or 'N'** to indicate whether you want to use an hourly loan rule and press **Enter**. If you keyed 'Y,' MOC prompts you to enter the time the item is due. Key a whole number from **0 to 23** (military time) and press **Enter**.
5. MOC prompts you to enter the barcode for each item that you are renewing for the patron. **Key or scan** the each item barcode and press **Enter**.
6. After renewing all of a patron's items, choose the **Clear Patron** button.

Creating Patron Records

1. Change to the **Patron Registration** mode.
2. The Patron Registration mode displays all the prompts and defaults that you entered in the Preferences dialog
3. **Key** the relevant patron information in each field. If necessary, you can leave fields blank.
4. To edit a field, place the cursor in the field and begin typing. To clear all of the data that you entered, choose the **Clear Patron Registration Settings** button. To save the data that you entered, choose the **Add** button. MOC records the patron's information in the **patron.dat** file and resets the fields.
5. To create another patron, repeat Step 2. There is no limit to the number of patrons you can register offline. However, uploading the data regularly will ensure that your database is up to date.

Uploading Transactions

1. Check that the server is running. Test this by starting Millennium Circulation and logging in; you will not be able to log in if the server is not available.
2. Open MOC. From the **File** menu, choose the **Upload circulation and patron data** option.
3. MOC prompts you to check that the server can accept data. If you were able to log into Millennium Circulation in step 1, choose **Yes**.
4. MOC connects to the server and uploads the PC's **patron.dat** and **circ.dat** files to the character-based system. When it is finished, MOC displays the number of uploaded circulation transactions and patron registrations.
5. Erase the files on the PC so that the same information cannot be uploaded again. MOC prompts you to erase the files after uploading them. You can also erase the files using the **File | Erase circulation transactions** or **File | Erase patron transactions** command.

NOTE: You should not erase **patron.dat** or **circ.dat** until you have verified the data was correctly uploaded to your cluster server. It may also be prudent to copy the files from **C:\\Millennium** to another folder before erasing them.

6. If multiple institutions are using MOC (such as during a downtime for a cluster), contact the MCO Help Desk (HELP@mobiusconsortium.org) to coordinate the schedule for each institution to upload their files.
7. When the files are uploaded, send a notice to the Help Desk, (HELP@mobiusconsortium.org), include the following:
 1. Your name
 2. Your institution
 3. The terminal number the files are for
8. MCO will process the transactions on the server and return the error report/log.

Compliance: If more than one member in a cluster is using MOC at the same time then the uploading must be coordinated with MCO.

Forms: N/A

Related documents: 2-5 Millennium Offline Circulation
<http://mobiusconsortium.org/file/961/download/1432>

Created by: MOBIUS Consortium Office
Adopted: MOBIUS Access Advisory Group; N/A
Revised: 10/29/2010, 2/11/2011
Replaces: None, revises existing procedure

Purpose of the procedure: For MOBIUS to evaluate how many bags are in use in the delivery system and decide if additional bag purchases are needed.

Background: The procedure is an annual one day bag count, on the third Tuesday in May.

Content of the procedure: After that day's delivery all MOBIUS libraries shall count both the number of KCLMIN bags and MOBIUS bags separately and report those numbers using the MOBIUS bag count web form. MOBIUS staff shall count the number of decommissioned bags at the MOBIUS office. MOBIUS will contact the courier and ask them to provide a count of the number of both MOBIUS bags and KCLMIN (Get Connected) bags in their warehouses that evening and report the inventory results to the MOBIUS Delivery Inbox. MOBIUS will also work with KCLMIN to arrange for a count of bags in the Get Connected libraries on the 3rd Tuesday in May. After MOBIUS receives all figures the Help Desk staff will post the results of the bag count to the MOBIUS website.

Compliance: Member libraries will need to report their bag counts, otherwise the inventory will not be accurate.

Forms: The bag count form to be used is located at:

<http://mobiusconsortium.org/forms/YYYY-annual-mobius-delivery-bag-inventory>

(YYYY is for the current year)

Related documents: Bag count data is recorded by MOBIUS at:
<http://mobiusconsortium.org/bag-counts-orders>

Created by: MOBIUS Access Advisory Group
Approved: MOBIUS Access Advisory Group
Revised: 11/29/2010, 2/04/2011
Replaces: N/A

Purpose of the procedure: To instruct each library on how to generate paging slips for requested material from their libraries.

Background: N/A

Content of the procedure:

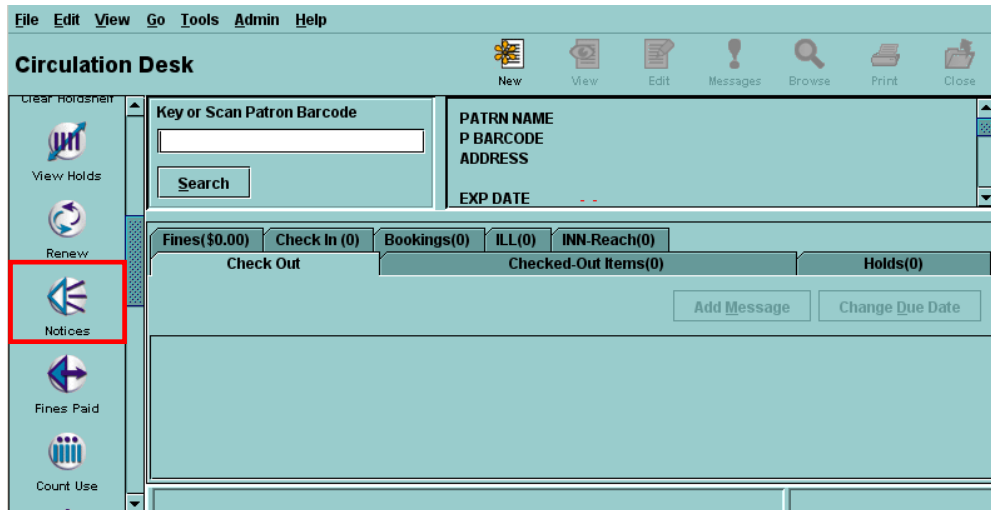
Overview

Every day, each library will print paging slips. The paging slips are generated for both cluster (local system) items and for items requested by INN-Reach (MOBIUS). PUA (Pickup Anywhere) paging slips are printed with INN-Reach slips and are noted by the letters "PUA" spelled out as ASCII text.

Once printed, the library staff will pull the books from the stacks. Books requested by local borrowers will be checked-in and placed on the hold shelf or set in-transit to another pick-up location in the local system. Books requested by MOBIUS borrowers will be checked-out using the INN-Reach check-out function and prepared for shipment via the delivery system. Both PUA and INN-Reach requests are processed the same way for outgoing books.

As of 11/20/2009 all clusters are using Saved Notices.

1. Log in to Millennium.
2. Select the Notices mode:



3. A list of saved jobs will show in white, with the job name on the far left. Typically there will be a job for INN-Reach and Paging slips. Click in the white area to select the job for your cluster paging slips.
4. Click on the purple/gold diamond icon at the top named "Prepare."
5. A pop-up box will come up for the printer to choose. Select the printer and then click on "Prepare" again.

Once the notices are printed:

Paging items

Take the paging slips that were printed and retrieve the items from the stacks.

Processing paged items

Each item will fall into one of the following cases:

- A. Cluster page: item found, pickup location is at your library
- B. Cluster page: item found, pickup is at a different library
- C. MOBIUS page: item found
- D. PUA Page: item found

Problems in processing paged items

Typical problems that may be encountered include:

- A. Cluster page: item found but does not circulate; hold to be cancelled
- B. Cluster page: item found but does not circulate; exceptions
- C. Cluster page: item not found
- D. MOBIUS/PUA page: item does not circulate
- E. MOBIUS/PUA page: item not found

Processing Paged Items

A. Cluster page: item found, pickup location is at your library

1. Check in the item.
2. Innovative will prompt you to place the item on the hold shelf and ask if you want to print a hold slip. Answer n. You do not need to print another hold slip because you can use the paging slip for the hold slip.
3. Write the patron's name and the date the item is to be removed from the hold shelf on the paging slip. The length of time items should be held on the hold shelf is determined by local policy but should normally be about one week.
4. Place the slip in the item and put it on the hold shelf filed under the patron's name.

B. Cluster page: item found, pickup is at a different library

1. Check in the item.
2. A box will appear telling you the item has a hold and should be sent to another library, with an option to place in transit. Click "OK" to set the item in-transit.
3. An option will appear asking if you want to print a transit slip. Answer n. Use the paging slip as a transit slip; fold it in half lengthwise, write on the slip the name of the library where it is to be picked up.
4. Send the item to the other library.

C. MOBIUS page: item found

1. Within Millennium choose the INN-Reach mode.
2. Select Check-Out, scan or type in the item barcode.
3. Fill out a MOBIUS (green) book band for each item with the following information:
 - a. To:
 - b. From:
 - c. Name of patron (last, first)
4. Attach the book band around the front cover in a way that does not cover the barcode using removable tape. Fold the MOBIUS paging slip on the dotted line and place in the item.
5. Do not add a due date to the green band. The due date is added at the time the patron checks out the book.
6. Package material for shipping via the delivery service.

D. PUA page: item found

7. Within Millennium choose the INN-Reach mode.
8. Select Check-Out, scan or type in the item barcode.
9. Fill out a PUA (salmon) book band for each item with the following information:
 - a. To:
 - b. From:
 - c. Name of patron (last, first)
10. Attach the book band around the front cover in a way that does not cover the barcode using removable tape. Fold the PUA paging slip on the dotted line and place in the item.
11. Do not add a due date to the salmon band. The due date is added at the time the patron checks out the book.
12. Package material for shipping via the delivery service.

Problems in processing paged items

A. Cluster page: item found but does not circulate; hold to be cancelled

1. From Millennium Circulation choose Search/Holds and enter the title of the book or its barcode.
2. Click on "Item Level Hold" or "Bib Level Hold," whichever shows the patron's hold on the item. Highlight the patron's hold by clicking on it.
3. Click on "Cancel Holds," A box will asking to print a hold cancel notice, select "Yes."
4. A list of pre-specified cancellation reasons can be selected , highlight the appropriate message. Click "OK" and a box will come up notifying the hold was cancelled. Click "OK" again. The message will go to the patron when notices are next run.
5. If there is another hold to cancel repeat the process for the new patron.

B. Cluster page: item found but does not circulate; exceptions

1. Process as for a found item that does circulate (see cases above) but add a note to the slip indicating that this is an exception and whether the item is held for library use only or if an override can be made to check out.

C. Cluster page: item not found

1. Process as a non-circulating item above.
2. See the searching procedures for your library.

D. MOBIUS/PUA page: item does not circulate

1. From Millennium Circulation choose Search/Holds and enter the title of the book or its barcode.
2. Click on "Item Level Hold" or "Bib Level Hold," whichever shows the patron's hold on the item. Highlight the patron's hold by clicking on it.
3. Click on "Cancel Holds," A box will come up asking either to cancel the hold or declare the item missing. Select "Cancel Hold."

4. A list of pre-specified cancellation reasons can be selected or a new message can be typed in. Click “OK” and a box will come up notifying the hold was cancelled. Click “OK” again. The message will be sent to the patron.

E. MOBIUS/PUA page: item not found

1. See the searching procedures for your library.
2. Use the same process for a MOBIUS item does not circulate; declare the item missing if that is your library’s procedure, or use the “Item not on shelf” reason.

Forms: N/A

Related documents: 3-4 Holds Processing Table
<http://mobiusconsortium.org/file/5447/download/7623>

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group; N/A
Revised: 11/29/2010
Replaces: Revises existing procedure

Purpose of the procedure: A borrowing library is sometimes unable to check-in a MOBIUS item received from the lending library. In some instances, the request is attached to the patron's record but the barcode is not found. This occurs when the lending library forgets to check-out the book to the off campus patron or when a message is lost between systems. In this case, the borrowing library must insert the barcode in the virtual item record. A lending library may also accidentally cancel a request and still send the book to the borrowing library. In this case, the request must be reinstated.

Background:

Content of the procedure:

Inserting Barcodes in Virtual Item Records

When checking in a MOBIUS item, a message may pop up saying "No record found with barcode....," insert the virtual barcode in the following manner:

1. In Millennium go into the patron record and click on the INN-Reach holds tab.
2. The barcode column will be empty, right click in this space which will pull up a menu.
3. Choose "Insert Virtual Barcode" from the list of options.
4. Scan (or type) the barcode on the item (WITHOUT the "b" you might have to type on the checkout screen). The barcode has been added to the virtual item. The item has been checked in (if necessary)
5. The item's status will change to "MOBIUS Recd".

Reinstating Canceled Requests

If a request is cancelled and there are multiple copies of a book, replacing the hold directly will not always select the same copy due to the random auto-select.

The command line version of the Innopac had the ability to place INN-Reach holds with the auto-select turned off and therefore holds could be placed on a specific book. This feature is no longer in the command line and a parallel feature is not in Millennium.

A. Holds are now replaced by the following method:

1. Locate book in Mobius (mobius.missouri.edu).
2. Click on "Request This Item"
3. Select the cluster the patron is affiliated with.
4. Enter the patron's name

Enter the override value (see chart below) and the patron ID number as follows:

/override value/ID number

Ex. /?4CAyeZ/ID1234567

The slashes are required for the override to be accepted.

5. Select the pickup cluster and location.
6. Select the book that patron had requested.

B. Override value chart

Archway	?4CAyeZ
Arthur	Fa8@p4@
Bridges	Qaz\$D7u
Galahad	=6SU#wU
Lance	!aSwePh
Merlin	v3Tu!aB
Missouri River Regional	NEz#fR7
Quest	z*b#4p4
SLU	?wE4Eye
Springfield-Greene	s6Yu?He
Swan	y+Br3_e
Towers	hAJ8-ex
WASHU	menUy-p
Wilco	sW\$chu*



1-7 Processing Problem Books Received from Other MOBIUS Libraries

Compliance: The override values should be used only by staff members.

Forms:

Related documents:

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group
Revised: 10/29/2010, 2/4/2011
Replaces: N/A

Purpose of the procedure: To ensure all items loaned through MOBIUS are properly returned to the owning library.

Background: N/A

Responsible party: MOBIUS Access Advisory Group, review as necessary

Content of the procedure:

1. In Millennium items are checked in using the Check-in (No Patron) mode. A box opens with the following message:

Barcode '1234567891234' was found as
'12345678912346clus'

Item belongs to _____ **Cluster**

Do Not Check-in

Check-In

Cancel

The **cluster** location code (6clus, such as 6mrln, is appended to the end of the barcode.

2. Choose 'Check-In'. The system changes the status to MOBIUS Ret'd. The item will remain as a virtual item on the patron's record until it is checked in by the owning library. It will no longer display among the items checked out to the patron.

3. The system then offers the option to print a transit slip. Choose 'No' as long as the book still has a green MOBIUS band. If the band is missing you may choose to print the transit slip to include with the book in shipment.

4. Cross through the TO address on the green MOBIUS book band and circle the RETURN TO address.

5. Place the item in a MOBIUS bag, insert an address label for the owning library in the window on the bag and secure the bag with a tie.

6. Return the book to the owning library through the MOBIUS courier.

Compliance:

N/A

Forms:

Green MOBIUS book bands
<http://mobiusconsortium.org/bookbands>

Delivery labels
<http://mobiusconsortium.org/delivery-label-maker>

Related documents:

N/A

Created by: MOBIUS Consortium Office

Adopted: MOBIUS Consortium Office; 9/02/2009

Effective date: 09/02/2009

Reviewed: 08/13/2010

Revised: 02/11/2011

Replaces: Damaged by Courier Claim Procedure

Purpose of the procedure: To provide an orderly rationale and process for documenting damages and filing claims for damaged materials.

Scope: The procedure will be used by MOBIUS members only for materials damaged in transit by the courier.

Background: This procedure has been existent in one form or another since the start of courier services with MOBIUS. The purpose of this revision is to bring it into current specifications and simplify the process.

Responsible party: MOBIUS, annual summer review or as needed.

Content of the procedure:

Follow the appropriate procedure below when items are received damaged by the courier.

I. Receipt of damaged items

Any library that receives items damaged by the courier files a damage report using the Delivery Problem Report and Supply Request Form on the MOBIUS website, located at:

<http://mobiusconsortium.org/forms/delivery-problem-report-and-supply-request-form>

The subject is selected as "Damaged Book(s)". The information is listed in the following manner:

Barcode number of bag/container

Date of Damage

Type of damage noted

Barcode, title, and owning libraries of books involved.

A copy of the damage report will be received as an e-mail by the library that enters it.

II. Damaged container

Send the container (bag, box, or tote) to the MAAC liaison at MOBIUS via the courier. Use the address from the label maker (<http://mobiusconsortium.org/node/4171/>) for MOBIUS:
MOBIUS-MOBIUS Consortium Office

III. Items not owned by the receiving library

Any materials that do not belong to the receiving library are sent to the owning library by the courier. Forward a copy of the damage report e-mail to the campus contact. Contacts can be located by the Circ and ILL Contact list located at:

<http://mobiusconsortium.org/node/5299>

IV. Claims for replacement or repair costs

If any materials are determined by the owning library to require replacement or repair, a claim form will be sent to the library by the courier representative.

The form is filled out and sent as an attachment to the e-mail address listed on the form, along with a copy of the damage report. Follow up and contact regarding the payment of a damage claim will be between the owning library and the courier. The owning library sends the damaged items to the MAAC liaison at MOBIUS when a claim is filed.

Compliance:

A damage report must be filled out within **15 days** of receipt of a damaged item.

Claims must be filed within 6 months of the date of damage.

The courier by contract is financially liable for up to **\$120 per item**, with a maximum liability of **\$500 per container**.

Training: No additional training is required.



1-9 Procedure for Items Damaged by the Courier

Forms:

The forms used are the:

Damage Report Form
Circ and ILL Contact List
MOBIUS Damage Claim Form

Related documents: No additional documents are required.

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group
Revised: 02/11/2011
Replaces: N/A

Purpose of the policy: To assist users in determining the home library of a patron from another cluster.

Background: N/A

Content of the policy: Because INN-Reach reports do not currently contain any patron information other than the patron number; users often have a hard time determining the home library of a patron from another cluster. To help with this problem, MAAC has compiled a list of people from each cluster who have volunteered to serve as first-contact people for their clusters. Users can contact them to obtain the name of the contact person at the patron's home library.

Archway	Roger Thomas	rthomas1@stlcc.edu
Arthur	Sue Reed	sue.reed@sos.mo.gov
Bridges	Steve Jamieson	steve.jamieson@covenantseminary.edu
Galahad	Debbie Young	dyoung@trcc.edu
LANCE	Ethan Cordray	ethan.cordray@linnstate.edu
MERLIN	Terri Hall	hallter@health.missouri.edu
Quest	Alice Ruleman	ruleman@libserv.ucmo.edu
SLU	Shuqin Jiao	jiaos2@slu.edu
SWAN	Joshua Lambert	jlambert@missouristate.edu
Springfield-Greene	Rhonda Brown	rhondab@mail.sgcl.org
Towers	Rodema J. Gnuschke	gnuschke@missouriwestern.edu
Washington U.	Stephanie Atkins	satkins@wustl.edu
WILO	John Oyler	joyler@spst.edu

Compliance: N/A

Forms: N/A

Related documents: N/A

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group; 11/02/2002
Revised: 10/29/2010, 2/4/2011, 2/24/11
Replaces: N/A

Purpose of the procedure: To provide an overview of Patron Initiated Circulation for MOBIUS.

Background: N/A

Content of the procedure:

1. **Types of materials available for loan** – monographs are the only item type available through MOBIUS patron initiated borrowing.
2. **Loan length** - 21 days for all patron types.

The only exception is an extended loan period of 120 days for materials lent between Saint Louis University (SLU) and MERLIN for graduate students, staff and faculty patrons. This arrangement was pre-existing from when SLU was part of MERLIN. The extended loan period does not affect the loan periods for other libraries in MOBIUS or loans between SLU and MERLIN to undergraduate patrons.

3. **Time held for Pickup** – 10 days or less. Each library determines how long to hold MOBIUS books for patrons to pickup, not to exceed 10 days.
4. **Renewals** - Items with additional holds may not be renewed. Two renewals of 21 days are allowed.

The only exception is an extended loan period for Saint Louis University (SLU) and MERLIN which permits two renewals of 120 days.

First and second renewals for direct patron borrowing can be accomplished at the patron's home library or online by the patron, but not at the loaning library. Third renewals are not allowed. Executing a third renewal can result in the item being overdue at the owning library and appearing on the Returned Too Long problem report, even though the renewal seems to be valid on the patron's local system. The book must be returned to the owning library and may be re-requested.

5. **Recalls** - Materials may only be recalled by the owning library, and may be recalled from any patron type. Minimum Use: 20 days

6. **Reserve** - Materials borrowed through MOBIUS may not be placed on reserve at the borrowing institution.
7. **Interlibrary Loan (ILL)** – For monographs patrons should be strongly encouraged to use MOBIUS patron initiated borrowing instead of traditional ILL.
8. **Patron records** - Complete patron records are available only in the home cluster of the patron. Only authorized staff at the patron's home library may change, update or enter patron records for their borrowers. Only staff at the home library may override blocks for their patrons.
9. **Load balancing** - A load balancing table is in the INN-Reach server, an attempt will be made to balance lending and borrowing over the course of time at each institution. The patron will not be able to designate which copy is to be borrowed unless the title has one or more volumes attached to it.
10. **Materials Available locally** - If a title is requested through MOBIUS and it is available locally, the system will choose the local item.
11. **Availability of Materials** - Coding in local records in a cluster should accurately reflect whether or not the item is requestable.
12. **MOBIUS loan rules** - MOBIUS loan rules should not be overridden to permit longer loans than originally allowed, either by extending loan periods or checking in and checking out again.
13. **Patron status** - Each institution determines who in its patron database will receive MOBIUS faculty, staff or student status. Each institution accepts responsibility for material borrowed by any person it has authorized to borrow through the MOBIUS system.
14. **Charges** - A lost book replacement charge of \$120 will be billed to patrons who do not return MOBIUS items 45 days after the due date. This includes a \$100 lost book fee and \$20 non-refundable billing fee. The patron's home library may keep the monies collected for the billing fee only when books are returned; the owning library will get all monies collected for replacement costs of lost books.
15. **Identification** - An institutional photo I.D. or an institutional I.D., plus a government issued photo I.D. (e.g., driver's license, state I.D., passport, etc.) will be required to check out materials as a Visiting Patron.

16. **Book Bands** - All MOBIUS (INN-Reach) book bands will be printed on green paper using the template(s) provided on the MOBIUS website:
<http://mobiusconsortium.org/bookbands>

Compliance: N/A

Forms: N/A

Related documents: N/A

Created by: MOBIUS Access Advisory Group
Approved: MOBIUS Access Advisory Group; N/A
Revised: 10/29/2010; 2/11/2011
Replaces: N/A

Purpose of the policy: To inform users of the three methods of lending materials among institutions.

Background: MOBIUS members have three methods of lending materials among institutions. These methods are direct patron borrowing through the MOBIUS union catalog, the visiting patron option of direct patron borrowing, and traditional interlibrary loan.

Methods of Borrowing:

1. DIRECT PATRON BORROWING

Direct patron borrowing allows patrons to place online requests for materials in the MOBIUS union catalog and the system determines where to direct the request. Patrons do have the option to request materials from particular institutions, and with the Pick-Up-Anywhere option to specify particular locations where they may claim their requested materials. Direct patron borrowing in the MOBIUS union catalog is limited to returnable items. MOBIUS members will not charge each other for direct patron borrowing within the MOBIUS union catalog and there will be no MOBIUS imposed limits on the number of requests that a patron can initiate. The MOBIUS Access Advisory Group will monitor the lending statistics and adjust the request balancing table to spread the load as evenly as possible.

2. VISITING PATRON OPTION

The Visiting Patron option of MOBIUS direct patron borrowing allows a patron to visit another MOBIUS institution and check out materials. **The Visiting Patron option will not be activated for standalone institutions.** The INN-Reach system verifies the patron in his local cluster patron file. Borrowing using the Visiting Patron option falls outside the load leveling capabilities of the system. If a library feels the patrons of another MOBIUS library are abusing this privilege, it should contact the library to resolve the problem. The visiting patron must be able to present a current, valid ID card from their home institution. If an institution does not provide their students or faculty with picture IDs, the visiting patron must be able to show some other form of picture ID, such as a driver's license, upon request. Materials cannot be checked out to anyone who cannot present their ID card. Use Visiting Patron ID examples and special notes to aid in entering correct number format located at:

<http://mobiusconsortium.org/node/5299>

3. TRADITIONAL INTERLIBRARY LOAN

Traditional interlibrary loan is available to all MOBIUS members and covers both returnables and non-returnables. **MOBIUS members will not charge each other for these traditional interlibrary loan transactions.** Libraries are encouraged to implement OCLC custom holdings with all MOBIUS OCLC members as one custom holdings group to balance the load. If a MOBIUS library feels that another library is making unreasonable requests, it should contact the library to resolve the problem. Libraries should use electronic transmission of articles whenever possible. If shipment via electronic transmission is not possible and a MOBIUS courier pouch is used to send an article or a book, then that item should be clearly marked, "Attention: Interlibrary Loan Department." Borrowing libraries will be responsible for copyright compliance on requests for photocopies.

LOCAL LIMITS

Each library determines whether it wants to limit the number of traditional interlibrary loan or patron initiated requests its patrons can make. Limits on patron initiated requests (both through the system and using the visiting patron option) are handled by the loan rules in the local cluster system.

OVERRIDES

MOBIUS INN-Reach loan rules are not to be overridden to give longer loan periods or to allow more than the standard two renewals. Library staff are not exempt and should not be overriding for themselves or others unless they have obtained express permission from the owning library. MOBIUS INN-Reach loans are made for 21 days, and two renewals of 21 days are permitted. Do not check-in and then check-out in an attempt to circumvent this policy. This can result in the item being overdue at the owning library and appearing on the Returned Too Long problem report, even though the transaction seems to be valid on the patron's local system.

RESPONSIBILITY FOR LOST OR DAMAGED MATERIALS

The patron's home library is responsible for any books provided by another MOBIUS member institution until they are received by the lending library. The patron's home library is responsible for collecting any fees and reimbursing the lending library for lost or damaged materials. The lost or damaged book fee is \$100 plus a billing/processing fee of \$20. Each member library is encouraged to resolve billed items at the lowest possible level as soon as practical, but not later than 6 months from the billing date.

STATISTICS

Statistics will be kept for direct/visiting patron borrowing and for traditional ILL. These statistics will be used as part of a review of this policy which the MOBIUS Access Advisory Group will conduct annually in the fourth quarter of each calendar year. The results of the review will be presented to the **MOBIUS Membership**.

Compliance: N/A

Forms: N/A

Related documents: N/A

Created by: MOBIUS Consortium Office
Adopted: MOBIUS Access Advisory Group; N/A
Revised: 8/13/2010, 11/20/2009
Replaces: N/A

Purpose of the procedure: N/A

Background: N/A

Content of the procedure:

The policy outlined below is to be followed if a patron loses or fails to return a book borrowed from a MOBIUS library other than the patron's home library. The patron's home library is responsible for collecting any fees and reimbursing the lending library for lost or damaged materials in accordance with the ALA Interlibrary Loan Code which states, "The requesting library is responsible for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library. This includes all material shipped directly to and/or returned by the user. If damage or loss occurs, the requesting library is responsible for compensation or replacement, in accordance with the preference of the supplying library." Borrowing libraries agree to vigorously pursue getting materials back from their patrons.

1. The library will send 2 overdue notices and a bill for materials borrowed through the INN-Reach system which are not returned to the lending library. The first notice will be produced when the book is 5 days overdue and the second notice will be produced when the book is 30 days overdue. A bill will be produced when the book is 45 days overdue.
2. The lost book fee is \$100 plus a billing/processing fee of \$20. The billing fee can be waived by the borrowing library if the book is returned. If the book is not returned, the lost book fee and \$20 processing fee will go to the lending library.
3. Each member library is encouraged to resolve billed items at the lowest possible level as soon as practical, but not later than **6 months** from the billing date. The borrowing library may contact the lending library to negotiate for a replacement or a lower lost book fee. It is at the discretion of the lending library whether they want to negotiate. There are no refunds issued to the patron or the borrowing library once the negotiation is complete. Once the negotiations are complete the lending library is not obligated to issue a refund.
4. Borrowing libraries must manually block patrons who have been billed (books are 45 days overdue) if this process is not automatic for their cluster. Manual blocking should be done monthly as part of the processing of the institutional overdue reports. Borrowing libraries may block patrons earlier if they so choose. A MOBIUS BLOCK code (m) will be used by all **clusters**.

5. This policy will be reviewed by the MOBIUS Access Advisory Group as needed or as requested by the MOBIUS Board.

TEXT FOR NOTICES AND BILLS

First Overdue (5 days after due date)

The item(s) on this notice are overdue. Please return to your home library or the lending library. A bill of \$120 per item will be sent if the items are not returned promptly.

Second Overdue (30 day after due date)

The item(s) on this notice are overdue. If item(s) are not returned within 15 of this notice, days you will be billed a \$100 lost item fee plus a \$20 processing fee for each item and your borrowing privileges will be suspended.

Bill

This bill is for late return or non-return of library materials. Your borrowing privileges will be suspended until you pay this amount or return the items.

Title
Lost Book Fee \$ 100
Processing fee \$ 20

Claims Returned

Borrowing libraries should contact the lending library if a patron claims to have returned a book. The "clms rtd" status should never be used for books loaned through MOBIUS.

Compliance: N/A

Forms: N/A

Related documents: N/A

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group; 10/26/2003
Revised: 5/27/2009, 11/29/2010, 2/11/2011
Replaces: N/A

Purpose of the policy: MOBIUS members may choose to use the Millennium Offline Circulation (MOC) module when access to online circulation is disrupted. MOC cannot be used for INN-Reach (MOBIUS) circulation transactions.

Background: MOC is a PC based application that enables libraries to continue with limited automated circulation functions (checkout, checkin, renewal, and patron registration). The information from these functions is stored on the computer hard drive. MOC may be used simultaneously on multiple PCs within the library. Only local (cluster) circulation transactions may be performed while using MOC.

Responsible party: MOBIUS Access Advisory Group, review as necessary

Content of the procedure: For circulation transactions, MOC stores the type of transaction, the patron barcode number, the item barcode number, and the date and time of the transaction. For patron registration, each library may select the information to be stored in the preferences table. When a library begins using MOC, it should notify the MOBIUS Helpdesk and each of the other cluster members that it is doing so. This is necessary to determine if the outage is more widespread than a single library in the cluster.

More than One Library within a Cluster Using MOC Concurrently

When more than one library in a cluster is using MOC at the same time, MOBIUS will coordinate uploading the files to the server and loading them to the database. This may be the result of an entire system being offline or of more than one library in a cluster experiencing local problems that prevent connectivity to the Millennium server.

1. After access to MilCirc is restored, continue using MOC until notified by the Helpdesk to upload the files to the server.
2. The Helpdesk will coordinate with each library a time for uploading and loading the files to minimize the amount of time between ending use of MOC and beginning use of MilCirc.
3. When the Helpdesk has everything in place to load the files, it will notify each library to upload its files from each PC used for MOC.

NOTE: Additional steps may be required to handle circulation transactions during the upload/loading period depending on the length of time required to complete the job.

4. Do not begin using MilCirc until the Helpdesk notifies the library that all offline files have been loaded.

Only One Library in a Cluster Using MOC at a Time

Libraries may choose to upload MOC files to the server and load them to the database when only one library in a cluster is using MOC. Or, libraries may choose to have the MOBIUS Helpdesk load the files to the database. Authorization to load the MOC files must be limited to the site coordinator and/or the circulation manager.

1. The library should notify the Helpdesk before beginning the loading process. Other processes may need to be suspended before the loading begins.
2. When MOC is run on more than one PC within a library or its branches, all files from all PCs must be uploaded before the files are loaded to the database.
3. Do not begin using Millennium Circulation until all offline files have been loaded.

NOTE: Additional steps may be required to handle circulation transactions during the uploading/loading period depending on the length of time required to complete the job.

Compliance: When a library begins using [the] MOC [application], it should notify the MOBIUS Helpdesk and each of the other cluster members that it is doing so.

Forms: N/A

Related documents: 1-4 Millennium Offline Circulation
<http://mobiusconsortium.org/file/6156/download/8410>

Created by: MOBIUS Access Advisory Group
Adopted: MOBIUS Access Advisory Group; 11/19/2002
Revised: 11/29/2010, 2/17/2011
Replaces: N/A

Purpose: The INN-Reach loan rules are in each cluster's list of loan rules, and are intended to provide a consistent set of loan rules under which monographs circulate in MOBIUS.

Background: N/A

Responsible party: MOBIUS Access Advisory Group, reviewed as necessary

	Loan Rule	Used by all members			Used only by MERLIN and SLU			Used by all members
1.	Name	MOBIUS Inst. Circ	MOBIUS Patron Circ	MOBIUS Visiting Patron	MOBIUS Extd Inst Cir	MOBIUS Extd Ptrn Cir	MOBIUS Extd. Visit P	MOBIUS Non-Circ
2.	Code	R	R	R	R	R	R	N
3.	Normal Loan Period	31	21	21	130	120	120	0
4.	Holdable	Y	Y	Y	Y	Y	Y	N
5.	Bookable	N	N	N	N	N	N	N
6.	Home Pickup	N	N	N	N	N	N	N
7.	Shippable	N	N	N	N	N	N	N
8.	Ship Time	0	0	0	0	0	0	0
9.	Time Remaining B4 Renew	7	7	7	7	7	7	0
10.	First Renewal Period	21	21	21	120	120	120	0
11.	Additional Renewal Period	21	21	21	120	120	120	0
12.	Max Number Of Renewals	2	2	2	2	2	2	0
13.	Minimum Use	20	20	20	20	20	20	0
14.	Eligib To Recall	0	0	0	0	0	0	0
15.	Time Return Recall	7	7	7	7	7	7	0
16.	Time To Pickup	10	10	10	10	10	10	0
17.	Max Number of Odues	3	3	3	3	3	3	0
18.	Time First Odue	5	5	5	5	5	5	0
19.	Time Second Odue	25	25	25	25	25	25	0
20.	Time Third Odue	15	15	15	15	15	15	0

21.	Time Fourth Odue	0	0	0	0	0	0	0
22.	Time Fifth Odue	0	0	0	0	0	0	0
23.	Time Sixth Odue	0	0	0	0	0	0	0
24.	Text First Odue (# varies by cluster)	The item(s) on this notice are overdue. Please return to your home library or the lending library. A bill of \$120 per item will be sent if the item(s) are not returned promptly.						
25.	Text Second Odue (# varies by cluster)	The item(s) on this notice are overdue. If item(s) are not returned within 15 days you will be billed a \$100 lost item fee plus a \$20 processing fee for each item and your borrowing privileges will be suspended.						
26.	Text Third Odue	0	0	0	0	0	0	0
27.	Text Fourth Odue	0	0	0	0	0	0	0
28.	Text Fifth Odue	0	0	0	0	0	0	0
29.	Odue Penalty	0	0	0	0	0	0	0
30.	Text First OdueR (# varies by cluster)	OVERDUE RECALLED MATERIAL!!! The following RECALLED items have not been returned and fines may be accruing. Return material immediately to avoid suspension of borrowing privileges.						
31.	Text Second OdueR (# varies by cluster)	OVERDUE RECALLED MATERIAL!!! The following RECALLED items have not been returned. Your borrowing privileges have been suspended until this material is returned.						
32.	Text Third OdueR	0	0	0	0	0	0	0
33.	Text Fourth OdueR	0	0	0	0	0	0	0
34.	Text Fifth OdueR	0	0	0	0	0	0	0
35.	Courtesy Notice Text Number	0	0	0	0	0	0	0
36.	Number of Days Before Odue	0	0	0	0	0	0	0
37.	Time 1st Odue Recall	0	0	0	0	0	0	0
38.	Text Recall Notice (# varies by cluster)	**** RECALL!!! RECALL!!! RECALL!!! **** The items listed below have been RECALLED for use by another patron or class reserve and MUST be returned by the NEW DUE DATE listed below. If materials are not returned on time, fines may accrue and library borrowing privileges may be suspended.						
39.	Text Pickup Notice (# varies by cluster)	The item(s) listed are now available for pickup at the location listed. It will remain at this location until the date listed below. Address inquiries to the pickup location listed here.						

40.	Text Cancel Pickup (# varies by cluster)	You did not pickup the item(s) listed on this notice within 7 days so it has been returned to the owning library. Address inquiries to the circulation department in your home library.						
41.	Grace Period For Fines	0	0	0	0	0	0	0
42.	Number Of D/HR 1st F PER	0	0	0	0	0	0	0
43.	Amount Of Fine 1st F PER	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
44.	Number Of D/HR 2nd F PER	0	0	0	0	0	0	0
45.	Amount Of Fine 2nd F Per	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
46.	Limit Fine To Price	N	N	N	N	N	N	N
47.	Default Item Cost	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	\$100.00	\$0.00
48.	Replace Process Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
49.	Replace Bill Service Charge	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$0.00
50.	Rental Fee	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
51.	Fine Incr If Recall	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
52.	Msg Fines (50-52 same # varies)	This bill is for late return or non-return of library materials. Your borrowing privileges will be suspended until you pay this amount or return the items.						
53.	Msg Bill							
54.	Msg Adjustment							
55.	Rental Circrtext	0	0	0	0	0	0	0
56.	Penalty Incr If Recall	0	0	0	0	0	0	0

DO NOT REMOVE BOOK BAND



Pickup Anywhere

Pickup At:

RETURN TO:

CODE (*delivery code*)

This book was supplied by:

Owning Library or Branch
Institution (if necessary)
City, State
Phone Number
Email Address

Patron:

(last) (first)

Return this book to your home library or the
lending library by the date stamped below:

MOBIUS Date Due: _____
*Item may be renewed twice, unless needed by
another patron.*

WARNING: Billing/processing fees may be
charged for each MOBIUS item not returned. Return
this item on time to avoid charges. If you have any
questions, please check with your home library.

DO NOT REMOVE BOOK BAND



Pickup Anywhere

Pickup At:

RETURN TO:

CODE (*delivery code*)

This book was supplied by:

Owning Library or Branch
Institution (if necessary)
City, State
Phone Number
Email Address

Patron:

(last) (first)

Return this book to your home library or the
lending library by the date stamped below:

MOBIUS Date Due: _____
*Item may be renewed twice, unless needed by
another patron.*

WARNING: Billing/processing fees may be charged for
each MOBIUS item not returned. Return this item on time to
avoid charges. If you have any questions, please check with
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DO NOT REMOVE BOOK BAND



Pickup At:

RETURN TO:

CODE (*delivery code*)

This book was supplied by:

Owning Library or Branch
Institution (if necessary)
City, State
Phone Number
Email Address

Patron:

(last) (first)

Return this book to your home library or the lending library by the date stamped below:

MOBIUS Date Due: _____
Item may be renewed twice, unless needed by another patron.

WARNING: Billing/processing fees may be charged for each MOBIUS item not returned. Return this item on time to avoid charges. If you have any questions, please check with your home library.

DO NOT REMOVE BOOK BAND



Pickup At:

RETURN TO:

CODE (*delivery code*)

This book was supplied by:

Owning Library or Branch
Institution (if necessary)
City, State
Phone Number
Email Address

Patron:

(last) (first)

Return this book to your home library or the lending library by the date stamped below:

MOBIUS Date Due: _____
Item may be renewed twice, unless needed by another patron.

WARNING: Billing/processing fees may be charged for each MOBIUS item not returned. Return this item on time to avoid charges. If you have any questions, please check with your home library.

Hold Placed Via:	Situation:	Hold becomes	Hold is processed as
MOBIUS Catalog	Patron is in one cluster Book is in a second cluster Pickup location is in a third cluster	PUA	PUA
MOBIUS Catalog	Patron and book are in the same cluster Pickup location is in a second cluster	PUA, Request to own site	PUA
MOBIUS Catalog	Patron and pickup location are in the same cluster Book is in a second cluster	INN-Reach Request	INN-Reach Request
MOBIUS Catalog	Patron, book and pickup location are all in the same cluster	Converts to local cluster hold	Cluster request
Cluster Catalog	Patron , book, and pickup location are in the same cluster	Local Cluster Hold	Cluster Request

Cluster Request	INN-Reach Request	PUA
Checkout Procedure		
Owning Library	Owning Library	Owning Library
Print cluster page slips (MilCirc or telnet)	Print INN-Reach page slips (MilCirc or telnet)	Print PUA page slips with INN-Reach slips
Check-In (No Patron) mode: scan barcode to put IN TRANSIT	INN-Reach mode: Check Out to Remote Site to put IN TRANSIT	INN-Reach mode: Check Out to Remote Site to put IN TRANSIT
Pickup Library	Pickup Library	Pickup Library
Check-In (No Patron) mode: scan barcode to receive, print pickup notice, place on holdshelf	Check-In (No Patron) mode: scan barcode to receive, print pickup notice, place on holdshelf	PUA mode: Receive Item ; pickup notice queued to patron's home library, put on holdshelf
Circ Desk mode: Check out item to patron	Circ Desk mode: check out item to patron	PUA mode: checkout item to patron
Return Procedure		
Item Returned to Pickup Location	Item Returned to Pickup Location	Item Returned to Pickup Location
Check-In (No Patron) mode: scan barcode to check in; send to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library	PUA mode: Return Item submenu; search and select item, Process , send to owning library
Item Returned to Patron Home Library	Item Returned to Patron Home Library	Item Returned to Patron Home Library
Check-In (No Patron) mode: scan barcode to check in; return to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library
Item Returned to Owning Library	Item Returned to Owning Library	Item Returned to Owning Library
Check-In (No Patron) mode: scan barcode to check in; reshelv item	Check-In (No Patron) mode: scan barcode to check in; reshelv item	Check-In (No Patron) mode: scan barcode to check in; reshelv item
Item Returned to Other MOBIUS Library	Item Returned to Other MOBIUS Library	Item Returned to Other MOBIUS Library
n/a	n/a	PUA mode: Return Item submenu; search and select item, send to owning library

INN-Reach reports are produced in Millennium in the Circulation Module. You must be authorized for function 340 (Inn-Reach Reports.) Please see your Site Coordinator if you are not authorized for this function. MCO produces the following reports according to the schedule and coverage given:

Type of Report	Dates Produced	Report coverage
In Transit Too Long	1 st and 15 th of every month	In transit more than 7 days
Institutional Overdues by Item	1 st and 15 th of every month	More than 45 days overdue
Institutional Overdues by Patron	1 st and 15 th of every month	More than 45 days overdue
Mobius Patrons*	N/A	N/A
Paged Too Long	1 st and 15 th of every month	Paged status more than 3 days
Received Too Long	1 st and 15 th of every month	MOBIUS RECVD status more than 7 days
Requested Too Long	1 st and 15 th of every month	MOBIUS REQUEST status more than 3 days
Returned Too Long	1 st and 15 th of every month	MOBIUS RETD status more than 21 days

****MOBIUS Patrons is currently produced as a review file by MOBIUS and is not available as a report in Millennium.***

The workflow for all the reports is as follows:

1. Log into Millennium Circulation
2. Select INN-Reach
3. Select Reports
4. Select Report type
5. Enter report parameters
6. Prepare report
7. Print report

The instructions are broken into two sections, section 1 for the steps in creating reports and section 2 for the specific entries for each report.

Section 1. Creating Reports

1. Log into Millennium Circulation

1. Log into Millennium, check that you are in the Circulation Module.

2. Select INN-Reach

1. Select the "INN-Reach" mode from the navigation bar.

Circulation Desk

File Edit View Go Tools Admin Help

New View Edit Messages Browse Print Close

Data Exchange

Merge Patrons

INN-Reach

Pickup Anywhere

Bookings Maintenance

Bookings Event

Course Reserves

Key or Scan Patron Barcode

Search

PATRN NAME
P BARCODE
ADDRESS
ADDRESS2
PCODE1

Fines(\$0.00) Check In (0) Bookings(0) ILL(0) INN-Reach(0)

Check Out

Checked-Out Items(0)

Holds(0)

Change Due Date

3. Select Reports

1. Select "Reports" at the bottom of the menu.

The screenshot shows the 'Circulation Desk' software interface. At the top is a menu bar with 'File', 'Edit', 'View', 'Go', 'Tools', 'Admin', and 'Help'. Below the menu bar is a toolbar with icons for 'New', 'View', 'Edit', 'Messages', 'Browse', 'Print', and 'Close'. The main interface is divided into several sections. On the left is a vertical menu with icons and labels: 'Up one level', 'Check-Out', 'Visitor Check-Out', 'Return Item', and 'Reports'. The 'Reports' item is highlighted with a red rectangular box. To the right of this menu is a search area with the label 'Key or Scan Patron Barcode', a text input field, and a 'Search' button. Further right is a form with labels: 'PATRN NAME', 'P BARCODE', 'ADDRESS', 'ADDRESS2', and 'PCODE1'. Below these are several tabs: 'Fines(\$0.00)', 'Check In (0)', 'Bookings(0)', 'ILL(0)', and 'INN-Reach(0)'. Under the 'INN-Reach(0)' tab, there are three sub-tabs: 'Check Out', 'Checked-Out Items(0)', and 'Holds(0)'. A 'Change Due Date' button is located to the right of these sub-tabs. The main area below the tabs is a large, empty rectangular box.

4. Select Report type

1. By default the first report listed is Institutional Overdues. From the pull down menu select the type of report that will be produced.

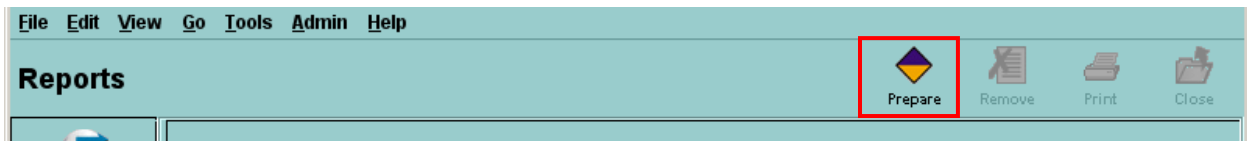
The screenshot shows the MOBIUS Reports application window. The title bar includes 'File Edit View Go Tools Admin Help'. The main window has a 'Reports' title and a sidebar on the left with icons for 'Up one level', 'Check-Out', 'Visitor Check-Out', 'Return Item', and 'Reports'. The main area contains a 'Report Type' dropdown menu, which is currently open, showing a list of report types: 'Institutional Overdues', 'Paged too long', 'Returned too long', 'Requested too long', 'In transit too long', and 'Received too long'. The 'Institutional Overdues' option is highlighted. To the right of the dropdown is a 'Location' section with radio buttons for 'Columbia', 'All' (selected), and 'Select Location' (with a text input field). Below these options is a table with columns: '#', 'Item #', 'Item Location', 'Call #', 'Title', 'Home Library', and 'Paged Date'. The table is currently empty.

5. Enter report parameters

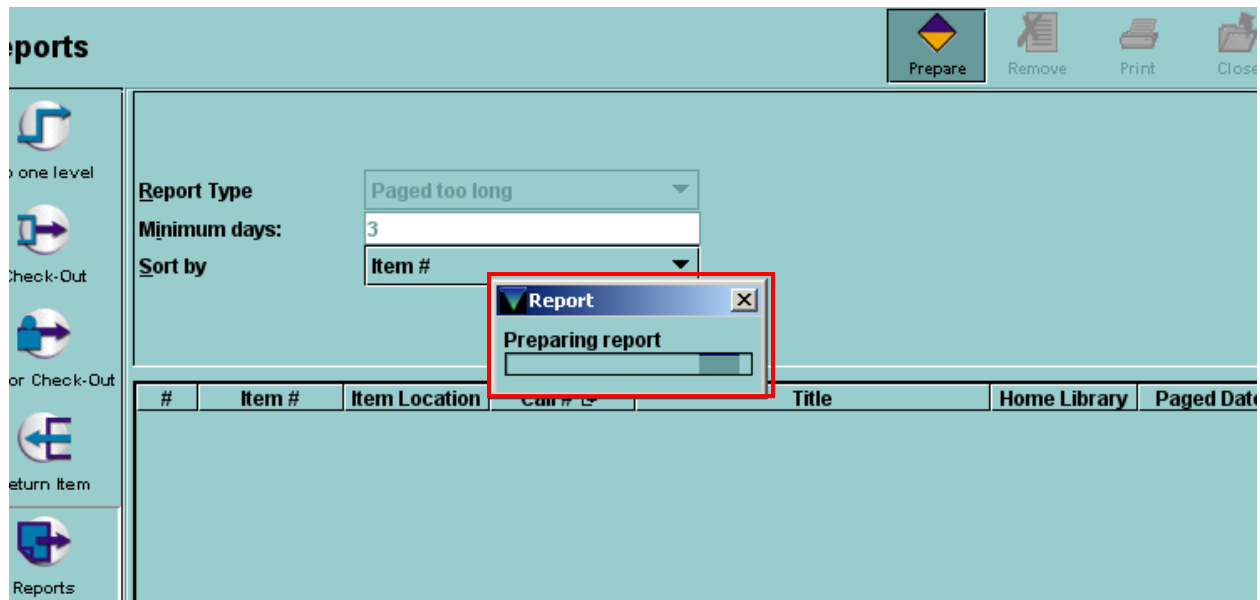
1. The parameters for the report (minimum days, search type and sort by field) are entered, see Section 2 for details.

6. Prepare report

1. At the top of the screen click on the icon for "Prepare."



2. The report will be prepared.



7. Prepare report

1. Once the report is ready, click on the "Print" icon.

File Edit View Go Tools Admin Help

Reports

Prepare Remove **Print** Close

Up one level

Check-Out

Visitor Check-Out

Return Item

Reports

Report Type: Paged too long

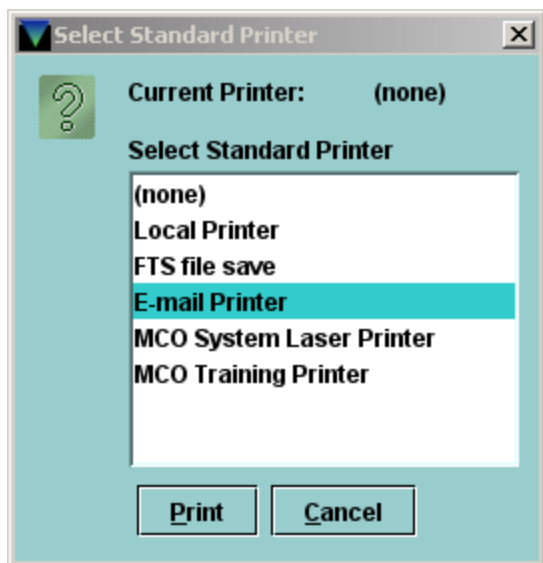
Minimum days: 3

Sort by: Paged Date

#	Item #	Item Location	Call #	Title	Home Library	Paged Date
1	i19072648	lptac-LU Gen...	E459 .R3125 ...	Fanatics and fire-eaters :	6lanc-Truma...	02-02-2009
2	i19535429	lptac-LU Gen...	HV45 .T68 20...	An introduction to group work prac...	6mrln-MU EL...	02-02-2009
3	i18948315	lpkii-LU Blac...	F472 .C3 H36...	The Black communities of south Ca...	6arth-Colum...	02-02-2009
4	i19469202	lptac-LU Gen...	CS16 .C375 2...	You can write your family history	6mrrl-Main Li...	02-02-2009
5	i18945429	lpeth-LU Ethn...	DT313.8 .E38...	Morocco bound :	6arch-STLCC...	02-02-2009
6	i10521100	lptac-LU Gen...	PZ7.H7083 M...	The man without a face.	6spri-Library ...	02-27-2009
7	i19365652	csiii-Columbi...	006.696 M91...	Introducing character animation wi...	6towe-NW O...	03-12-2009
8	i12396710	shiii-Stephen...	M1001.S56 o...	Symphonies	6arth-Missou...	04-03-2009
9	i19444825	shjii-Stephen...	598.94 Schu	Pale Male :	6gala-SEMO ...	04-15-2009
10	i19597010	shjii-Stephen...	E Peri	Tommaso and the missing line	6arth-Missou...	04-17-2009
11	i18222572	2riii-WC Ree...	BP171.5 .A28...	The place of tolerance in Islam	6lanc-Truma...	04-17-2009
12	i14208465	2rhii-WC Ree...	HT178.F72 P...	Paris, la ville, 1852-1870 :	6arch-STLCC...	04-17-2009

12 entries

2. Select "E-mail Printer" and enter your e-mail address.



2. Click on "Close" at the top right of the screen to exit back to the main report menu.

3. Click on "Up one level" on the top left of the modes menu to exit Reports.

Section 2. Report Entries

1. In Transit Too Long

Type: In transit too long

Minimum days: (MCO uses 7)

Sort by: (MCO uses In Transit Date)

Report Type	In transit too long ▼
Minimum days:	7
Sort by	In Transit Date ▼

2. Institutional Overdues by Item

Type: Institutional Overdues

Minimum days: (MCO uses 45)

Maximum: 9999 (default)

Sort by: Item Location & Call Number

Location: User may select the locations served table used by the login, all locations, or one specific location. MCO uses all.

Report Type	Institutional Overdues	Location	<input type="radio"/> Columbia <input checked="" type="radio"/> All <input type="radio"/> Select Location <input type="text"/>
Minimum days:	45		
Maximum	9999		
Sort by	Item Location & Call Number		

3. Institutional Overdues by Patron

Type: Institutional Overdues

Minimum days: (MCO uses 45)

Maximum: 9999 (default)

Sort by: Patron Home Library & Name

Location: User may select the locations served table used by the login, all locations, or one specific location. MCO uses all.

Report Type	Institutional Overdues	Location	<input type="radio"/> Columbia <input checked="" type="radio"/> All <input type="radio"/> Select Location <input type="text"/>
Minimum days:	45		
Maximum	9999		
Sort by	Patron Home Library & Name		

4. Paged Too Long

Type: Paged Too Long

Minimum days: (MCO uses 3)

Sort by: Paged Date

Report Type	Paged too long ▼
Minimum days:	3
Sort by	Paged Date ▼

5. Received Too Long

Type: Paged too long

Minimum days: (MCO uses 7)

Sort by: Received Date

Report Type	Received too long ▼
Minimum days:	7
Sort by	Received Date ▼

6. Requested Too Long

Type: Requested too long

Minimum days: (MCO uses 3)

Sort by: Requested Date

Report Type	Requested too long ▼
Minimum days:	3
Sort by	Requested Date ▼

6. Returned Too Long

Type: Returned too long

Minimum days: (MCO uses 21)

Sort by: Received Date

Report Type	Returned too long ▼
Minimum days:	21
Sort by	Returned Date ▼

Cluster Notices, Billing, and Fees

Cluster	1st Notice	2nd Notice	3rd Notice	Billed Notice
Archway				
Arthur	1 day overdue	7 days later		7 days later
Bridges	5 days overdue	30 days overdue		45 days overdue
Galahad	1 day overdue	14 days overdue		21 days overdue
Lance	1 day overdue	7 days overdue		15 days overdue
Merlin				
Quest	7 days overdue	14 days overdue	21 days overdue	28 days overdue
St. Louis U.	5 days overdue	15 days overdue		30 days overdue
Springfield-Greene Co. Library				
SWAN	7 days overdue	14 days overdue		21 days overdue
Towers	1 day overdue	10 days overdue		20 days overdue
Washington U	7 days overdue	14 days overdue		30 days overdue
WILO	1 day overdue	7 days overdue		varies

Comments
Does not have a separate lost book policy. Each institution decides when notices will be sent. No processing fees charged.
Galahad libraries do not charge each other; however, some borrowing libraries keep the \$20 if that is their policy to collect from the patron. Reconciliation at 6 months.
Borrowing library keeps the \$20 since they do the retrieval of the item.
Each library will determine how many and when overdue notices are to be sent. Lost book fees vary.
Lending keeps the \$20 processing fee.
Courtesy notice 3 days before due date
Lending library is responsible for notices and billing and gets the \$20 billing fee.
The lending library sends out the overdue and billed notices, but the borrowing library also makes contact with the patron.

[illegible]

[illegible]



INN-Reach Patron Mapping Chart

How to use this document

The Central INN-Reach server and each cluster have patron mapping tables that list each patron and their associated borrowing limits. What this chart does is take the main table for the Central server (which is over 600 lines long) and both breaks it up for each cluster and lists it with the cluster patron type list. This chart only shows the limits for requests via INN-Reach.

The simplest way to use this is to look at the worksheet for your cluster, and then the column Campus Description. To the right are the central patron type and checkout limits, and the visiting and checkout limits. The additional columns are used by MCO when revisions to the tables are made.

Cells that are highlighted in pink are ones where there is a question about the patron type and borrowing limits. If changes are needed, please contact the MCO Help Desk.

Revised 12-13-2010

tron type
entral INN-Reach
ie corresponding

in for
ptype
are needed.

rowing limits.



MOBIUS Circulation Best Practices Manual

MOBIUS Access Advisory Group

Last Changed: 3/7/2011

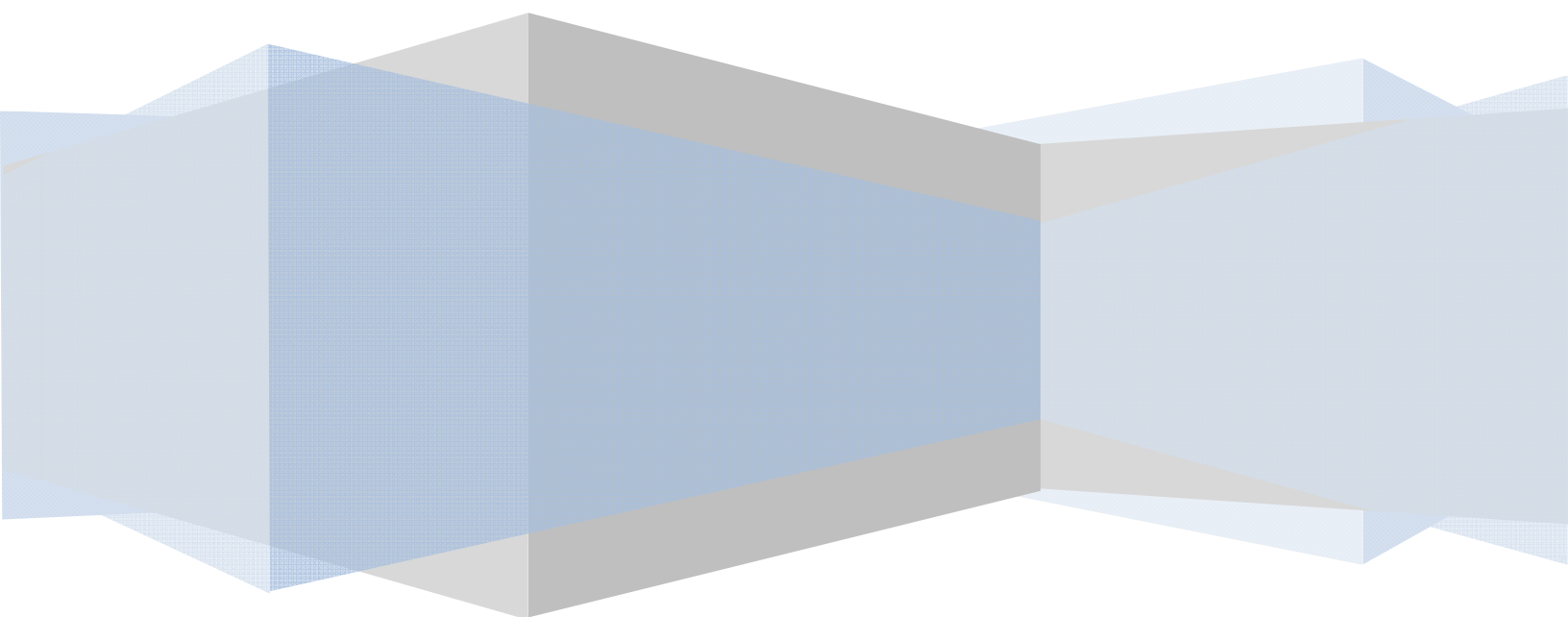


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MOBIUS

Circulation Best Practices Manual

A. Introduction

1. Purpose of this manual

This manual is intended as a general purpose guide to common procedures in circulation such as processing books and other items, printing paging slips, and sending materials via the courier. Use of this manual is voluntary; policies and procedures that are MOBIUS required have the title highlighted in red and should not be changed. Members may otherwise edit and customize it for their own needs, sections that should be customized are highlighted in light blue. This manual is adapted from one originally used by the SWAN cluster

2. The MOBIUS Consortium

Each member is part of the state-wide consortium MOBIUS. Most members are clusters; which is one server where several institutions share a common catalog and other resources. Others are standalones where the server hosts the catalog and resources for a single library or group of libraries that belong to one institution. As of 2011 there are a total of 14 clusters/standalones that belong to MOBIUS.

There are two levels of borrowing and lending to consider. The first is within an institution/cluster. The policies and procedures at this level, such as how much to charge overdue fines, how long materials are loaned, etc., are determined by the member libraries or institution.

The next level is between different clusters or standalones. These are called MOBIUS loans and also INN-Reach for For these a uniform set of policies, loan rules, and procedures for all members has been adopted and can be seen in more detail here:

<http://mobiusconsortium.org/policies-procedures>

Materials borrowed within or between clusters are delivered by a courier system maintained by MOBIUS.

B. Patrons

1. Patron identification or IDs

The MOBIUS Patron Initiated Circulation Policy:

<http://mobiusconsortium.org/file/968/download/1440>

States that any visiting patron must be able to present a current, valid ID card from his/her home institution. If an institution does not provide its students or faculty with picture IDs, the visiting patron must be able to show some other form of picture ID, such as a driver's license, upon request. Materials cannot be checked out to anyone who cannot present his/her ID card.

2. Entering notes into the patron record

Notes may be added to the patron record at the discretion of the home library only.

3. Entering on-the-fly patrons

An on-the-fly patron is an impromptu and usually temporary record to allow a patron to check out materials when they are not in the system. On-the-fly patrons should only be entered by the patron's home library.

C. Check Out

1. Types of check outs

Library materials can be checked out in the following three ways:

- a) To current patrons of the home library.
- b) To visiting patrons within your cluster.
- c) To visiting MOBIUS patrons.
- d) To PUA (Pickup Anywhere) patrons

(Note: as of 3/7/11 visiting MOBIUS patrons is not enabled for public standalone institutions: MRRL and SGCL)

2. Checking out to home library patrons

- a) Start Millennium in Circulation Desk mode.
- b) Input patron's ID information. If the ID has no picture, have the patron show you a driver's license or other acceptable picture ID.
- c) Input item barcode(s).
- d) Process the book according to your institution's procedures by stamping a due date, printing a receipt, etc., so that the patron has a record of the due date.
- e) If applicable, desensitize each item.
- f) Remind the patron about each item's due date, renewal, and fees.

3. Checking out to a visiting patron

- a) Start Millennium in Circulation Desk mode.
- b) Input patron's ID information. If the ID has no picture, have the patron show you a driver's license or other acceptable picture ID.
- c) Input item barcode(s).
- d) Process the book according to your institution's procedures by stamping a due date, printing a receipt, etc., so that the patron has a record of the due date.
- e) If applicable, desensitize each item.
- f) Remind the patron about each item's due date, renewal, and fees.

4. Checking out to a cluster patron with no ID number on his/her ID card

- a) If the patron presents an ID card that does not have a number or barcode to enter, the patron may give his ID number verbally.
- b) Once a patron record has been brought up by a number, verify the name in the record with the name on the card, and check the picture on the ID card or another acceptable photo ID, such as a driver's license.
- c) While steps 1 and 2 should help the majority of patrons during visiting check-outs, it is occasionally necessary to enter a patron by name.
- d) Once the patron's name has been entered, verify his/her ID number in the record.
- e) If he/she does not know the ID number, have him/her verify an address or telephone number.

(Note: Patrons should not call the home library and get their ID number. It can be a security problem and it should be a rule that they know their own ID number. The home library does not know who it is over the phone and does not want to give out that sort of personal information over the phone.)

5. Checking out to a MOBIUS patron

- a) In Millennium, choose the "INN-Reach mode."
- b) Click on the "Visitor Check-Out" button.
- c) Choose the patron's cluster and click the "Select" button. (If the patron does not know his/her cluster, you can refer to the list of members in the appendix.
- d) Follow the instructions which appear above the text box for entering the patron's unique ID#.
- e) Input item barcodes.
- f) Process books according to your institution's procedures by stamping a due date, printing a receipt, etc., so the patron has a record of the due date.
- g) If applicable, desensitize each item.
- h) Give book(s) to the patron with a verbal reminder of the due date, renewal, and fees.

6. Checking out to a PUA (Pickup Anywhere) Patron

- a) Go to "PUA mode" in Millennium Circulation.
- b) The default "Check-out" will already be selected.
- c) The patron must present a valid picture ID card, or a valid ID plus another picture ID before proceeding with check-out.
- d) Enter the patron's last name, then first name. (An "n" doesn't need to precede the name)
- e) Click on the "Search" button.
- f) All PUA requests in that patron's name appear in a list.
- g) Select the item to be checked out by clicking in the box to the left of the title to highlight.
- h) Click on the "Process" button.
- i) The item status changes to the due date.* (This date will appear in the MOBIUS catalog)
- j) Record the due date on the book band, desensitize, and give to the patron with a verbal reminder of the due date and the fees and charges for damaged, lost, or non-returned materials.

*A PUA item cannot be renewed by the pickup location library. The patron must contact his/her home library to renew a PUA book.

D. Blocks and Fees

1. MOBIUS Blocks

A MOBIUS block can be placed on a patron record for either non-return of loaned items or a fee owed to a lending library. A MOBIUS block should only be placed by the patron's home library. To place a MOBIUS block:

- a) Bring up the patron's record.
- b) Click on the "Edit" button.
- c) Double click on the "MBLOCK" field.
- d) Choose "MOBIUS block" from the menu.
- e) Click on the "Insert" icon.
- f) Choose "Note" from the drop-down menu.
- g) Type in a message indicating that you have placed a block on the patron record and why. Put in your initials and the initials of your institution along with the date. For example: "MOBIUS BLOCK FOR 3 BILLED OTC ITEMS. DMY/SBU 1/3/07"
- h) Save the record.
- i) A patron with a MOBIUS block cannot check out materials from a MOBIUS library, including the patron's home library, with the exception of in-house use reserve materials. Materials must be returned and fees must be reconciled before the block can be lifted.

2. **MOBIUS charges and fees**

For materials lent between clusters or standalone, the Millennium Circulation system generates a \$120 bill for each item that a patron keeps for 21 days past its due date. One hundred dollars of the fee covers the replacement cost of the book. The other \$20 is a billing fee. When an item that has been charged to a patron is returned, the \$100 replacement cost is removed from the patron record, leaving the billing fee. Fees for other libraries should be honored because of the shared environment of the MOBIUS consortium. MOBIUS fees belong to the patron's home library which can choose whether or not to collect.

3. **Accepting payment for fees to another library**

[Keep this section if your cluster accepts fees for another library and delete it if it does not.]

When a patron owes a fee to another library, he or she may pay the fee either at the lending library or his/her home library. When accepting a fee for another library:

- a) Have the patron make a check or cash payment to the lending library.
- b) Give the patron a receipt, if applicable.
- c) Put the cash or check into an envelope. Include a print-out of the fine page in the patron's record.
- d) Send to the lending library via the courier.
- e) Notify the library that a check has been sent.
- f) If the patron has paid the fee and wishes to borrow an item from his/her home library, the block can be overridden for that transaction, but not removed from the record.
- g) Upon receipt of the fee payment, the lending library should clear the patron's record, and if a MOBIUS block has been placed, clear the block and any related notes.

E. **PINs** [Keep this section about PINs if your cluster uses PINs. Delete if it does not use PINs.]

1. **Personal Identification Numbers**

Requesting materials from other libraries within your cluster using the cluster catalog requires the patron to have a PIN. The PIN can consist of any combination of numbers and letters from four to 32 characters in length. The PIN also allows patrons to access their patron record so that they may renew materials, manage holds, etc.

2. **Establishing a PIN**

A PIN can be established in the following two ways:

- a) On the catalog page of each institution, there is an option which allows the patron to view his/her account. After the patron selects this option, the system will guide him/her through the process of establishing a PIN. This requires entering a name, unique ID number, and new PIN. The system recognizes that the PIN is new and takes the patron to a page where the new PIN must be entered twice. Then, the new PIN is linked to the patron record, and he or she can proceed to view the record or go to the catalog to request materials.

- b) A PIN can also be established at the time that a patron requests an item in the cluster catalog. When the patron has clicked on the “Request Item” button in the item record, he/she will be taken to the page where one identifies oneself as a cluster patron. He or she will be asked to enter a name, unique ID, and PIN. If he/she does not have a PIN number, one must be entered at this time. He or she will then be shown a second page where one must re-enter a new PIN twice. After this, the PIN is established, and the system will allow the patron’s request.

3. Deleting a PIN from a patron record

- a) In Millennium Circulation, bring up the patron record.
- b) Click on the “Edit” button.
- c) Once in the patron record, locate the field preceded by an equal sign (=). This is the field for the PIN, which is encrypted.
- d) Highlight the PIN, including the equal sign, and delete.
- e) Save and close the record.

F. Requests

1. Requesting a book through the cluster catalog

- a) Find an item in the cluster catalog by subject, title, author, etc.
- b) Click on the “Request” button.
- c) Enter the patron name first.
- d) Enter the “unique ID.” (The patron’s “unique ID” number consists of his/her campus ID number as determined by his/her institution, plus the campus code for the institution)
- e) Enter the PIN. (See section above on how to establish a PIN) [Delete this if your cluster does not use PINs.]
- f) Choose a pickup location from the drop-down menu. Occasionally, there will be an additional step where the patron will be asked to choose the lending institution or a volume number if the patron is requesting an item from a multi-volume set.
- g) The system will return a message either informing you that the request was successful or that there was an error. Some error messages include:
 - 1) “Improper PIN.”
 - 2) “Problem with patron’s record” means that the unique ID was entered incorrectly, but can also mean that the patron’s record is blocked, has expired, etc.
 - 3) “No requestable items” means that a non-circulating item has been requested.

2. Requesting a book through the MOBIUS catalog

- a) Either search within your local catalog, if a desired book cannot be found click on the “Search MOBIUS” button, or begin a search directly in the MOBIUS catalog by subject, title, author, etc.
- b) Click on the “Request” button. (The patron may first choose to display holdings of MOBIUS libraries which allows them to view the copies owned by various libraries and whether they are available)
- c) The next screen asks, “With which institution are you affiliated?” The patron should select your cluster from the drop down menu.
- d) Enter the patron’s name first.
- e) Enter the unique ID. (The patron’s unique ID number consists of his/her campus ID number as determined by his/her institution, plus the campus code for the institution)
(Note: a PIN is not required for a MOBIUS loan.)
- f) The patron should choose a pickup cluster and location from the drop-down menu. Pickup locations do not have to be at the patron’s home library and can be at any location the user prefers.
- g) A “need by” date may also be entered, but this is not a mandatory field.
- h) After the form is filled out, click on the “Submit” button.
- i) You will either receive a message that your request was successful or an error message. The following are common error messages:
 - 1) “Improper PIN.”
 - 2) “Problem with patron’s record” means that the unique ID was entered incorrectly, but can also mean that the patron’s record is blocked, has expired, etc.
 - 3) “No requestable items” means that a non-circulating item has been requested.
- j) At this point a “virtual item record” is created at the patron’s library, and a “virtual patron record” at the book owner’s library. The two virtual records are linked.
- k) If a patron requests an item available through your cluster on the MOBIUS level, the system will automatically fill the request from a cluster library.

G. Holds

1. Cancelling a cluster hold

Cluster holds can be cancelled in one of two ways: either through the Search/Holds function in Millennium Circulation or by accessing the patron record.

- a) Cancelling from the Search/Holds module
 - 1) Click on the “Search/Holds” button in Millennium Circulation.
 - 2) Choose “Barcode” from menu.
 - 3) Scan item barcode.
 - 4) Click on either the “Item Level Holds” or “Bib Level Holds” tab, whichever is showing the hold.

- 5) Highlight the item you wish to cancel.
- 6) Click on the "Cancel Holds" button.
- 7) You will receive the messages "Cancel hold-change status to missing", "Cancel hold", or "Do not cancel hold." Click on the appropriate choice.
- 8) The next message asks, "Print hold cancel notice?" Choose "Yes," "No," or "Cancel."
- 9) Close the record.
- 10) Return to the lending library.

- b) Cancelling from the patron record
 - 1) Bring up the patron record.
 - 2) Click on the "INN-Reach holds" tab.
 - 3) Highlight the item you wish to cancel.
 - 4) Click on the "Cancel Holds" button.
 - 5) You will receive the message "Cancel hold change status to missing" or "Cancel Hold." Select the appropriate response.
 - 7) Choose whether or not you want a notice to be printed.
 - 8) The item's status changes to "In Transit."
 - 9) Close the record.
 - 10) Return to the lending library.

2. Cancelling a MOBIUS hold in transit

INN-Reach holds should only be cancelled if a requested item has not yet been placed in transit.

- c) Bring up the patron record.
- d) Click on the "INN-Reach holds" tab.
- e) Highlight the item you wish to cancel.
- f) Click on the "Cancel Holds" button.
- g) Close the record.

If the item has already been sent by the lending library, do not cancel the hold, but wait for the item to arrive and return as an unwanted MOBIUS item. However, be aware that patrons who manage their own holds will be allowed by the system to cancel holds at any time during the process.

3. Transferring holds within a cluster

When one of your patrons requests an item from another library in your cluster and the original lending library is not able to fill the hold, you may transfer the hold to another copy of that item within the cluster if there is more than one item record attached to the same bib record as the item that has been requested.

- a) Click on "Search/Holds."
- b) Search for the item by the barcode.
- c) The bib record will appear with its attached item records. The requested item will be highlighted. If this is the only item attached, then the hold cannot be transferred to another item and must be cancelled.

- d) If there are multiple items, click on "Transfer Holds."
- e) The message reads, "Transfer 1 hold from ixxxxxxx to..."
- f) Choose an item from the list.
- g) Click on "OK."
- h) A message asks if you wish to change the original item's status to "missing." Select "Yes" or "No."
- i) A message asks if you wish to queue a paging slip for later printing. Select "Yes" or "No." The hold transfers to the new item.

H. Paging Slips

1. Holds Chart

When a patron places a hold on an item, the hold can become a cluster request; a MOBUS request, or a Pickup Anywhere (PUA) request.

This is indicated by the following chart:

Hold Placed Via:	Situation:	Hold becomes	Hold is processed as
MOBIUS Catalog	Patron is in one cluster Book is in a second cluster Pickup location is in a third cluster	PUA	PUA
MOBIUS Catalog	Patron and book are in the same cluster Pickup location is in a second cluster	PUA, Request to own site	PUA
MOBIUS Catalog	Patron and pickup location are in the same cluster. Book is in a second cluster.	MOBIUS Request	MOBIUS Request
MOBIUS Catalog	Patron, book and pickup location are all in the same cluster	Converts to local cluster hold	Cluster request
Cluster Catalog	Patron , book, and pickup location are in the same cluster	Local Cluster Hold	Cluster Request

As a daily morning process the library that owns the book requested prints paging slips that show requests for materials they own to send out. Paging slips are printed for cluster (within the catalog) requests and MOBILUS or INN-Reach.

2. Holds Workflow Chart

The chart below illustrates the workflow on the different types of holds:

Cluster Request	MOBIUS Request	PUA
Checkout Procedure		
Owning Library	Owning Library	Owning Library
Print cluster page slips (MilCirc or telnet)	Print INN-Reach page slips (MilCirc or telnet)	Print PUA page slips with INN-Reach slips
Check-In (No Patron) mode: scan barcode to put IN TRANSIT	INN-Reach mode: Check Out to Remote Site to put IN TRANSIT	INN-Reach mode: Check Out to Remote Site to put IN TRANSIT
Pickup Library	Pickup Library	Pickup Library
Check-In (No Patron) mode: scan barcode to receive, print pickup notice, place on holdshelf	Check-In (No Patron) mode: scan barcode to receive, print pickup notice, place on holdshelf	PUA mode: Receive Item ; pickup notice queued to patron's home library, put on holdshelf
Circ Desk mode: Check out item to patron	Circ Desk mode: check out item to patron	PUA mode: checkout item to patron
Return Procedure		
Item Returned to Pickup Location	Item Returned to Pickup Location	Item Returned to Pickup Location
Check-In (No Patron) mode: scan barcode to check in; send to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library	PUA mode: Return Item submenu; search and select item, Process , send to owning library
Item Returned to Patron Home Library	Item Returned to Patron Home Library	Item Returned to Patron Home Library
Check-In (No Patron) mode: scan barcode to check in; return to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library
Item Returned to Owning Library	Item Returned to Owning Library	Item Returned to Owning Library
Check-In (No Patron) mode: scan barcode to check in; reshelv item	Check-In (No Patron) mode: scan barcode to check in; reshelv item	Check-In (No Patron) mode: scan barcode to check in; reshelv item
Item Returned to Other MOBIUS Library	Item Returned to Other MOBIUS Library	Item Returned to Other MOBIUS Library
n/a	n/a	PUA mode: Return Item submenu; search and select item, send to owning library

3. Printing paging slips (Cluster, Standalone and MOBIUS)

- a) In Millennium Circulation, click "Notices" on the left sidebar.
- b) All clusters use "Saved Notices" where each notice type can be saved. They can either be run by clicking on them or if none have been saved by clicking the "New" button at the top of the screen.
- c) Check that the radio button indicates your institution. Never print "All," as this will print every paging slip for all institutions in your cluster.
- d) Next to "Notice type," click on the down arrow in the box.
- e) Scroll down and click on "Item Paging Slips" to print paging slips for your cluster, or "INN-Reach Paging Slips" to print paging slips for MOBIUS. The option that you choose will appear in the text box.
- f) Click the "Prepare" button at the top of the screen.
- g) A pop-up box appears which allows you to select a printer. Select printer.
- h) A pop-up box appears which displays the printer's status. Choose "Print".
- i) The message "Preparing notices" appears.
- j) Notices may be sorted at this point.
- k) If all is in order, click on "Send Notices."
- l) The "Send Notices" box appears. "Send entries 1 – X to print." Click "OK".
- m) The pop-up box states, "X notices printed. Clear all print notices?" Check notices carefully. If everything is correct, click "Yes." This clears the queue, and the notice information is lost. If there is a problem with the printed notices, do not clear. The problem needs to be addressed. (You may need to contact the MOBIUS help desk to resolve the issue)
- n) Click the "Close" button at the top of the screen if there are no issues to resolve.
- o) A prompt will come up to save the session if you have not made one already. You can either select cancel or save it as a new notice job.

4. Processing requests from a patron in your cluster

- a) The paging slips for cluster libraries will include the title, call number, and barcode.
- b) Find the book on the shelf. If multiple copies of the title are owned, check the barcode to make sure it is the specific requested item.
- c) In the Circulation Desk function of Millennium Circulation, check in the item. A message will come up saying, "Put on holdshelf for (patron's name)." The pickup notice will be printed.
- d) Set the status to "IN TRANSIT TO" (the three letter code for the pickup location), "ON HOLDSHELF," or "CANCEL."
- e) Click on the "In Transit to (location)" button. You may, optionally, print the transit slip and place it inside the book.
- f) Put a book band on the book cover, each cluster has its' preferred color. Don't cover the barcode. Fill in the patron's name (last name first, then first name), and check the institution where the book is being sent.
- g) Place the paging slip in the book.

- h) Print the appropriate label from the MOBIUS label maker:

<http://mobiusconsortium.org/node/4171/>

Insert the label into the window of the MOBIUS bag.

- i) Place the book in the bag along with any other items for this location.
- j) Record the book/bag numbers. {Edit as appropriate for your institution.}
- k) Zip shut and use a plastic tie to secure the bag.
- l) Place with other courier items.

5. Processing requests from a MOBIUS patron

(Note: Some MOBIUS requests will be items requested by patrons at institutions within your cluster.)

- a) Print INN-Reach paging slips. These include the title, call number, and barcode.
- b) Locate the item on the shelf. Check the barcode to be sure you have the exact item requested.
- c) Click on the “INN-Reach mode” on the sidebar in Millennium Circulation.
- d) Select the “Check-out” button.
- e) Scan or key in the item barcode.
- f) A message comes up saying, “Item was requested by a patron (gives the .p number) at a cluster (ex.: 6mrln).” Select “OK.”
- g) A message comes up: “Item has status MOBIUS PAGED and has been cleared.” Select “OK.”
- h) A message comes up: “Send book to above patron at _____ cluster.” Select “OK.”
- i) Sort the books by pickup location – MOBIUS books in one group, cluster books in another.

Choose one of the two following steps:

- 1. **For items with a MOBIUS pickup location**, put a green MOBIUS book band on the book cover. Avoid covering the barcode. Fill out the “To:” space with the patron’s chosen pickup location information. Use the library-specific code found on the paging slip. Fill in the patron’s name but not the due date.
- 2. **For items with a pickup location in your cluster**, put a {indicate local colors/preferences} book band on the front cover. Avoid covering the barcode. Fill in the patron’s name and check the institution chosen as the pickup location on the paging slip.
- j) Insert the paging slip inside the front cover of the book. Do not tape to the book band.
- k) Print the appropriate label from the MOBIUS label maker:

<http://mobiusconsortium.org/node/4171/>

Insert the label into the window of the MOBIUS bag.

- l) Record the book/bag numbers {Edit as appropriate for your institution.}
- m) Zip the bag closed and secure with a plastic tie.
- n) Place with other courier items.

6. Processing PUA (Pickup Anywhere) requests

A PUA loan is accomplished exactly like a regular MOBIUS loan:

- a) PUA paging slips will print out with the INN-Reach paging slips. They will look like a regular INN-Reach slip, but will say “PUA” in large ASCII text across the top.
- b) Locate the item on the shelf. If you own multiple copies, check the barcode to be sure that you have the exact item requested.
- c) Click on the “INN-Reach” mode on the sidebar in Millennium Circulation.
- d) Select the “Check-out” button.
- e) Scan or key in the item barcode.
- f) The patron’s information will appear in the upper right portion of the screen, and a message box will appear with the patron’s “.p” number and a pickup location. Click “OK.”
- g) Another message box will appear which reads, “Item has status MOBIUS PAGED” and has been cleared. Click “OK.” Item status changes to “OFF CAMPUS.”
- h) A third message box appears stating, “Send book to above patron at _____Cluster.” Click “OK.”
- i) Check-out is complete. The title, pickup location, and cluster due date are displayed.
- j) **Put a salmon-colored PUA book** band on the book cover. Avoid covering the barcode. Fill out the “To:” space with the patron’s chosen pickup location information. Use the library-specific code found on the paging slip. Fill in the patron’s name but not the due date.
- k) Insert the paging slip inside the front cover of the book. Do not tape to the book band.
- l) Print the appropriate label from the MOBIUS label maker:

<http://mobiusconsortium.org/node/4171/>

Insert the label into the window of the MOBIUS bag.

- m) Record the book/bag numbers **{Edit as appropriate for your institution.}**
- n) Zip the bag closed and secure with a plastic tie.
- o) Place with other items to go via courier.

I. Receiving

1. Receiving books delivered by the courier

- a) Cut ties and remove books from the bags. Make sure that each bag is empty before storing since very small items may have been shipped.
- b) Sort books into two groups: items returned to your library and items that have been requested.
- c) Items being returned to your library should be **checked in** to change their status from “In Transit” or “MOBIUS Ret’d” to “Available.” Remove and discard the book bands along with any other paperwork in the books.
- d) Items that have been received can be separated further into cluster (**Cluster colored bands**), MOBIUS (Green book bands) and PUA (Salmon Book bands).

- e) Check in each cluster or MOBIUS item requested by patrons.* The item status will change from "In Transit" to "On Hold Shelf for YOUR CLUSTER "or "Ready for Pickup for MOBIUS."

For PUA items see page below as the check-in process is different.

- f) The patron will be notified by the system that his/her item is ready for pick up. Place the item on the hold shelf in order by the patron's last name.
- g) When the patron arrives to pick up his/her item(s), he/she must present a valid ID card. Proceed with checkout. Record the due date on the book band, desensitize, and give to the patron with a verbal reminder of the due date and the fees and charges for damaged, lost, or non-returned materials.
- h) Items not picked up after seven days on the hold shelf should be returned to the lending library. See the section below on returning unwanted MOBIUS items and cancelling cluster holds.

**Inserting a barcode:*

If, upon checking in a MOBIUS item, you receive the message, "No record found with barcode...", insert the virtual barcode in the following manner:

1. Go into the patron record and click on the "INN-Reach holds" tab.
2. Right click in the empty space in the barcode column for that item.
3. Choose "Insert virtual barcode" from the list of options.
4. Scan the barcode.
5. The item's status will change to "MOBIUS Rec'd."

2. Receiving a PUA (Pickup Anywhere) item

- a) When an item arrives by courier delivery with a salmon book band, check to see that your library code is in the pickup location box.
- b) In Millennium Circulation, select "Pickup Anywhere" mode.
- c) Click on "Receive Item."
- d) Scan the barcode. If the barcode is scanned and there is a message that no record of that barcode exists, use the title.
- e) Click on the "Search" button.
- f) The item will appear in a list which shows the title, barcode, owning site's cluster code, item status, and date of last transaction.
- g) Click in the box to the left of the title if the item is not highlighted. If you have received more than one item, scan all of them.
- h) Highlight all items in the list, and click on the "Process" button. The item status will change from "Shipped" to "Received."
 - a) Put an arrow in the text box, and right-click if you need to see the patron information.
 - b) Click "Show Detail" in the drop-down menu. This will show you everything you need to know about the patron.
- i) Place the PUA item on the hold shelf. There is no need to contact the patron. (The home library will receive notification that the book is ready for pickup and will inform the patron)

J. Returning Items

1. Returning cluster/MOBIUS items to the lending institution

- a) Check in cluster or MOBIUS books that are returned. The status of the book will change to “In transit” (for cluster items) or “MOBIUS Ret’d” (for MOBIUS items).
- b) Once an item is checked in, place it in a MOBIUS bag. Insert an address label in the window of the bag and secure it with a tie.
- c) Process the bag for shipping.

2. Returning a PUA (Pickup Anywhere) item to the lending library

- a) Go to “PUA mode” in Millennium Circulation.
- b) Click on the “Return Item” button.
- c) Scan item barcode and click the “Search” button. (If the barcode will not work, use the title) The item will appear in the list.
- d) Select the item by clicking on the box to the left of the title.
- e) Click the “Process” button.
- f) The item’s status will change to “Returned.”
- g) Cross out your pickup location code and circle the lending library’s information on the book band.
- h) Return to the lending library via the courier in the usual manner.

3. Returning unwanted MOBIUS items

To return unwanted MOBIUS items, or items which have been on the hold shelf seven days past receipt:

- a) Click on the “INN-Reach” button.
- b) Click on “Return Item.”
- c) Scan the barcode.
- d) Return to lending library.

K. Loaning or receiving damaged materials

This section is regarding loan or receipt of materials that are not related to damage cause by the courier, such as loose pages, age, and general wear

1. Loaning

It is up to the lending library whether materials in disrepair are loaned. If your library loans materials that are damaged or in need of repair, record the damage on the book band before sending. You may add a note in the item record. This will alert your library about the damage upon check-in so that the book may be repaired when it is returned.

2. Receiving

If your library receives an item that has been loaned in a state of disrepair and it is **not** noted on the book band, record the damage prominently on the book band and contact the owning library. For example: “Pages 35-52 loose upon receipt. DMY 9/3/07.” This way, the patron cannot be

blamed for the damage when the book is returned to the lending library. If the damage is too severe, the borrowing library may decide to restrict circulation; i.e. patron may use in library only. The decision could be made to not allow the book to circulate at all, to return the book to the lending library, or to request a different copy for the patron.

L. MOBIUS Cluster Codes

Name	Site Code	Full Name
Archway	MOBRE	N/A
Arthur	MOBCE	N/A
Bridges	MOBTE	N/A
Galahad	MOBSE	N/A
LANCE	MOBNE	Libraries and Networks Cooperating in Education
MERLIN	MOBUM	Missouri Education and Library Information Network
Quest	MOBCW	N/A
SWAN	MOBSW	Southwest Academic Network
Towers	MOBNW	N/A
WILO	MOBWE	Western Interlibrary Organization
SGCL	SPRIN	Springfield Greene County Library
WashU	WASH	Washington University
MRRL	MRRL	Missouri River Regional Library
SLU	SLU	St. Louis University

M. MOBIUS Clusters and Member Institutions

Archway East Central College Jefferson College St. Charles Community College St. Louis College of Pharmacy St. Louis Community College	Arthur Columbia College Lincoln University Missouri State Library Stephens College Westminster College William Woods University
Bridges Covenant Theological Seminary Fontbonne University Harris-Stowe State University Kenrick-Glennon Seminary Lindenwood University Logan College of Chiropractic Maryville University Missouri Baptist University Webster University / Eden Theological Seminary	Galahad Mineral Area College Southeast Missouri State University Three Rivers Community College
LANCE Culver-Stockton College Hannibal-LaGrange College Kirksville College of Osteopathic Medicine Linn State Technical College Moberly Area Community College Truman State University	MERLIN University of Missouri - Columbia University of Missouri - Kansas City Missouri Science and Technology University of Missouri - St. Louis
Quest Central Methodist State University Missouri Valley College State Fair Community College University of Central Missouri	SWAN Baptist Bible College Cottey College Crowder College Drury University Ozarks Technical Community College Missouri Southern State University Missouri State University Southwest Baptist University
Towers Conception Abbey Seminary Missouri Western State University North Central Missouri College Northwest Missouri State University	WILO Avila University Metropolitan Community Colleges: Blue River, Longview, Maple Woods, Penn Valley Midwestern Baptist Theological Seminary Rockhurst University Saint Paul School of Theology William Jewell College Kansas City Art Institute
Standalones SLU – St. Louis University MRRL – Missouri River Regional Library SGCL – Springfield-Greene County Library WashU – Washington University	



MOBIUS Circulation Best Practices Manual

MOBIUS Access Advisory Group

Last Changed: 3/7/2011

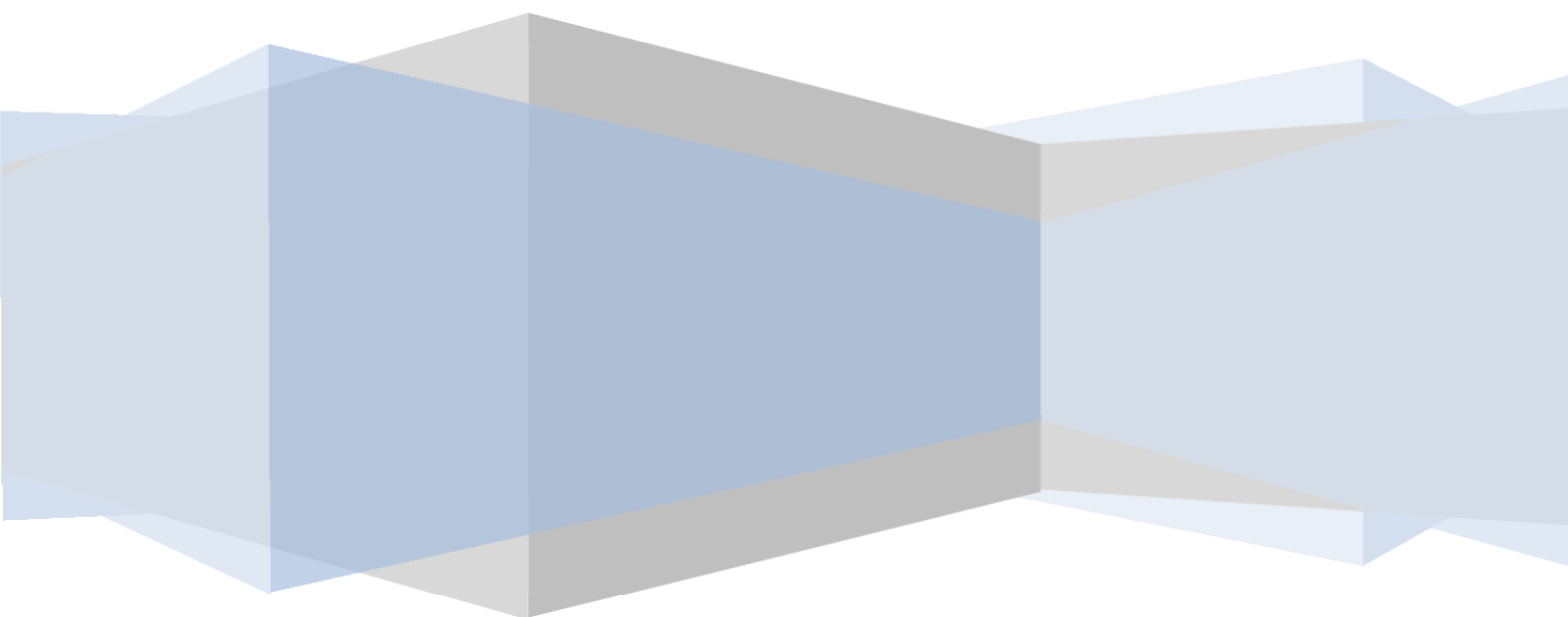


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MOBIUS

Circulation Best Practices Manual

A. Introduction

1. Purpose of this manual

This manual is intended as a general purpose guide to common procedures in circulation such as processing books and other items, printing paging slips, and sending materials via the courier. Use of this manual is voluntary; policies and procedures that are MOBIUS required have the title highlighted in red and should not be changed. Members may otherwise edit and customize it for their own needs, sections that should be customized are highlighted in light blue. This manual is adapted from one originally used by the SWAN cluster

2. The MOBIUS Consortium

Each member is part of the state-wide consortium MOBIUS. Most members are clusters; which is one server where several institutions share a common catalog and other resources. Others are standalones where the server hosts the catalog and resources for a single library or group of libraries that belong to one institution. As of 2011 there are a total of 14 clusters/standalones that belong to MOBIUS.

There are two levels of borrowing and lending to consider. The first is within an institution/cluster. The policies and procedures at this level, such as how much to charge overdue fines, how long materials are loaned, etc., are determined by the member libraries or institution.

The next level is between different clusters or standalones. These are called MOBIUS loans and also INN-Reach for For these a uniform set of policies, loan rules, and procedures for all members has been adopted and can be seen in more detail here:

<http://mobiusconsortium.org/policies-procedures>

Materials borrowed within or between clusters are delivered by a courier system maintained by MOBIUS.

B. Patrons

1. Patron identification or IDs

The MOBIUS Patron Initiated Circulation Policy:

<http://mobiusconsortium.org/file/968/download/1440>

States that any visiting patron must be able to present a current, valid ID card from his/her home institution. If an institution does not provide its students or faculty with picture IDs, the visiting patron must be able to show some other form of picture ID, such as a driver's license, upon request. Materials cannot be checked out to anyone who cannot present his/her ID card.

2. Entering notes into the patron record

Notes may be added to the patron record at the discretion of the home library only.

3. Entering on-the-fly patrons

An on-the-fly patron is an impromptu and usually temporary record to allow a patron to check out materials when they are not in the system. On-the-fly patrons should only be entered by the patron's home library.

C. Check Out

1. Types of check outs

Library materials can be checked out in the following three ways:

- a) To current patrons of the home library.
- b) To visiting patrons within your cluster.
- c) To visiting MOBIUS patrons.
- d) To PUA (Pickup Anywhere) patrons

(Note: visiting MOBIUS patrons is not enabled for public standalone institutions: MRRL and SGCL)

2. Checking out to home library patrons

- a) Start Millennium in Circulation Desk mode.
- b) Input patron's ID information. If the ID has no picture, have the patron show you a driver's license or other acceptable picture ID.
- c) Input item barcode(s).
- d) Process the book according to your institution's procedures by stamping a due date, printing a receipt, etc., so that the patron has a record of the due date.
- e) If applicable, desensitize each item.
- f) Remind the patron about each item's due date, renewal, and fees.

3. Checking out to a visiting patron

- a) Start Millennium in Circulation Desk mode.
- b) Input patron's ID information. If the ID has no picture, have the patron show you a driver's license or other acceptable picture ID.
- c) Input item barcode(s).
- d) Process the book according to your institution's procedures by stamping a due date, printing a receipt, etc., so that the patron has a record of the due date.
- e) If applicable, desensitize each item.
- f) Remind the patron about each item's due date, renewal, and fees.

4. Checking out to a cluster patron with no ID number on his/her ID card

- a) If the patron presents an ID card that does not have a number or barcode to enter, the patron may give his ID number verbally.
- b) Once a patron record has been brought up by a number, verify the name in the record with the name on the card, and check the picture on the ID card or another acceptable photo ID, such as a driver's license.
- c) While steps 1 and 2 should help the majority of patrons during visiting check-outs, it is occasionally necessary to enter a patron by name.
- d) Once the patron's name has been entered, verify his/her ID number in the record.
- e) If he/she does not know the ID number, have him/her verify an address or telephone number.

(Note: Patrons should not call the home library and get their ID number. It can be a security problem and it should be a rule that they know their own ID number. The home library does not know who it is over the phone and does not want to give out that sort of personal information over the phone.)

5. Checking out to a MOBIUS patron

- a) In Millennium, choose the "INN-Reach mode."
- b) Click on the "Visitor Check-Out" button.
- c) Choose the patron's cluster and click the "Select" button. (If the patron does not know his/her cluster, you can refer to the list of members in the appendix.
- d) Follow the instructions which appear above the text box for entering the patron's unique ID#.
- e) Input item barcodes.
- f) Process books according to your institution's procedures by stamping a due date, printing a receipt, etc., so the patron has a record of the due date.
- g) If applicable, desensitize each item.
- h) Give book(s) to the patron with a verbal reminder of the due date, renewal, and fees.

6. Checking out to a PUA (Pickup Anywhere) Patron

- a) Go to "PUA mode" in Millennium Circulation.
- b) The default "Check-out" will already be selected.
- c) The patron must present a valid picture ID card, or a valid ID plus another picture ID before proceeding with check-out.
- d) Enter the patron's last name, then first name. (An "n" doesn't need to precede the name)
- e) Click on the "Search" button.
- f) All PUA requests in that patron's name appear in a list.
- g) Select the item to be checked out by clicking in the box to the left of the title to highlight.
- h) Click on the "Process" button.
- i) The item status changes to the due date.* (This date will appear in the MOBIUS catalog)
- j) Record the due date on the book band, desensitize, and give to the patron with a verbal reminder of the due date and the fees and charges for damaged, lost, or non-returned materials.

*A PUA item cannot be renewed by the pickup location library. The patron must contact his/her home library to renew a PUA book.

D. Blocks and Fees

1. MOBIUS Blocks

A MOBIUS block can be placed on a patron record for either non-return of loaned items or a fee owed to a lending library. A MOBIUS block should only be placed by the patron's home library. To place a MOBIUS block:

- a) Bring up the patron's record.
- b) Click on the "Edit" button.
- c) Double click on the "MBLOCK" field.
- d) Choose "MOBIUS block" from the menu.
- e) Click on the "Insert" icon.
- f) Choose "Note" from the drop-down menu.
- g) Type in a message indicating that you have placed a block on the patron record and why. Put in your initials and the initials of your institution along with the date. For example: "MOBIUS BLOCK FOR 3 BILLED OTC ITEMS. DMY/SBU 1/3/07"
- h) Save the record.
- i) A patron with a MOBIUS block cannot check out materials from a MOBIUS library, including the patron's home library, with the exception of in-house use reserve materials. Materials must be returned and fees must be reconciled before the block can be lifted.

2. **MOBIUS charges and fees**

For materials lent between clusters or standalone, the Millennium Circulation system generates a \$120 bill for each item that a patron keeps for 21 days past its due date. One hundred dollars of the fee covers the replacement cost of the book. The other \$20 is a billing fee. When an item that has been charged to a patron is returned, the \$100 replacement cost is removed from the patron record, leaving the billing fee. Fees for other libraries should be honored because of the shared environment of the MOBIUS consortium. MOBIUS fees belong to the patron's home library which can choose whether or not to collect.

3. **Accepting payment for fees to another library**

[Keep this section if your cluster accepts fees for another library and delete it if it does not.]

When a patron owes a fee to another library, he or she may pay the fee either at the lending library or his/her home library. When accepting a fee for another library:

- a) Have the patron make a check or cash payment to the lending library.
- b) Give the patron a receipt, if applicable.
- c) Put the cash or check into an envelope. Include a print-out of the fine page in the patron's record.
- d) Send to the lending library via the courier.
- e) Notify the library that a check has been sent.
- f) If the patron has paid the fee and wishes to borrow an item from his/her home library, the block can be overridden for that transaction, but not removed from the record.
- g) Upon receipt of the fee payment, the lending library should clear the patron's record, and if a MOBIUS block has been placed, clear the block and any related notes.

E. **PINs** [Keep this section about PINs if your cluster uses PINs. Delete if it does not use PINs.]

1. **Personal Identification Numbers**

Requesting materials from other libraries within your cluster using the cluster catalog requires the patron to have a PIN. The PIN can consist of any combination of numbers and letters from four to 32 characters in length. The PIN also allows patrons to access their patron record so that they may renew materials, manage holds, etc.

2. **Establishing a PIN**

A PIN can be established in the following two ways:

- a) On the catalog page of each institution, there is an option which allows the patron to view his/her account. After the patron selects this option, the system will guide him/her through the process of establishing a PIN. This requires entering a name, unique ID number, and new PIN. The system recognizes that the PIN is new and takes the patron to a page where the new PIN must be entered twice. Then, the new PIN is linked to the patron record, and he or she can proceed to view the record or go to the catalog to request materials.

- b) A PIN can also be established at the time that a patron requests an item in the cluster catalog. When the patron has clicked on the “Request Item” button in the item record, he/she will be taken to the page where one identifies oneself as a cluster patron. He or she will be asked to enter a name, unique ID, and PIN. If he/she does not have a PIN number, one must be entered at this time. He or she will then be shown a second page where one must re-enter a new PIN twice. After this, the PIN is established, and the system will allow the patron’s request.

3. Deleting a PIN from a patron record

- a) In Millennium Circulation, bring up the patron record.
- b) Click on the “Edit” button.
- c) Once in the patron record, locate the field preceded by an equal sign (=). This is the field for the PIN, which is encrypted.
- d) Highlight the PIN, including the equal sign, and delete.
- e) Save and close the record.

F. Requests

1. Requesting a book through the cluster catalog

- a) Find an item in the cluster catalog by subject, title, author, etc.
- b) Click on the “Request” button.
- c) Enter the patron name first.
- d) Enter the “unique ID.” (The patron’s “unique ID” number consists of his/her campus ID number as determined by his/her institution, plus the campus code for the institution)
- e) Enter the PIN. (See section above on how to establish a PIN) [Delete this if your cluster does not use PINs.]
- f) Choose a pickup location from the drop-down menu. Occasionally, there will be an additional step where the patron will be asked to choose the lending institution or a volume number if the patron is requesting an item from a multi-volume set.
- g) The system will return a message either informing you that the request was successful or that there was an error. Some error messages include:
 - 1) “Improper PIN.”
 - 2) “Problem with patron’s record” means that the unique ID was entered incorrectly, but can also mean that the patron’s record is blocked, has expired, etc.
 - 3) “No requestable items” means that a non-circulating item has been requested.

2. Requesting a book through the MOBIUS catalog

- a) Either search within your local catalog, if a desired book cannot be found click on the “Search MOBIUS” button, or begin a search directly in the MOBIUS catalog by subject, title, author, etc.
- b) Click on the “Request” button. (The patron may first choose to display holdings of MOBIUS libraries which allows them to view the copies owned by various libraries and whether they are available)
- c) The next screen asks, “With which institution are you affiliated?” The patron should select your cluster from the drop down menu.
- d) Enter the patron’s name first.
- e) Enter the unique ID. (The patron’s unique ID number consists of his/her campus ID number as determined by his/her institution, plus the campus code for the institution)
(Note: a PIN is not required for a MOBIUS loan.)
- f) The patron should choose a pickup cluster and location from the drop-down menu. Pickup locations do not have to be at the patron’s home library and can be at any location the user prefers.
- g) A “need by” date may also be entered, but this is not a mandatory field.
- h) After the form is filled out, click on the “Submit” button.
- i) You will either receive a message that your request was successful or an error message. The following are common error messages:
 - 1) “Improper PIN.”
 - 2) “Problem with patron’s record” means that the unique ID was entered incorrectly, but can also mean that the patron’s record is blocked, has expired, etc.
 - 3) “No requestable items” means that a non-circulating item has been requested.
- j) At this point a “virtual item record” is created at the patron’s library, and a “virtual patron record” at the book owner’s library. The two virtual records are linked.
- k) If a patron requests an item available through your cluster on the MOBIUS level, the system will automatically fill the request from a cluster library.

G. Holds

1. Cancelling a cluster hold

Cluster holds can be cancelled in one of two ways: either through the Search/Holds function in Millennium Circulation or by accessing the patron record.

- a) Cancelling from the Search/Holds module
 - 1) Click on the “Search/Holds” button in Millennium Circulation.
 - 2) Choose “Barcode” from menu.
 - 3) Scan item barcode.
 - 4) Click on either the “Item Level Holds” or “Bib Level Holds” tab, whichever is showing the hold.
 - 5) Highlight the item you wish to cancel.
 - 6) Click on the “Cancel Holds” button.

- 7) You will receive the messages “Cancel hold-change status to missing”, “Cancel hold”, or “Do not cancel hold.” Click on the appropriate choice.
 - 8) The next message asks, “Print hold cancel notice?” Choose “Yes,” “No,” or “Cancel.”
 - 9) Close the record.
 - 10) Return to the lending library.
- b) Cancelling from the patron record
- 1) Bring up the patron record.
 - 2) Click on the “INN-Reach holds” tab.
 - 3) Highlight the item you wish to cancel.
 - 4) Click on the “Cancel Holds” button.
 - 5) You will receive the message “Cancel hold change status to missing” or “Cancel Hold.” Select the appropriate response.
 - 7) Choose whether or not you want a notice to be printed.
 - 8) The item’s status changes to “In Transit.”
 - 9) Close the record.
 - 10) Return to the lending library.

2. Cancelling a MOBIUS hold in transit

INN-Reach holds should only be cancelled if a requested item has not yet been placed in transit.

- c) Bring up the patron record.
- d) Click on the “INN-Reach holds” tab.
- e) Highlight the item you wish to cancel.
- f) Click on the “Cancel Holds” button.
- g) Close the record.

If the item has already been sent by the lending library, do not cancel the hold, but wait for the item to arrive and return as an unwanted MOBIUS item. However, be aware that patrons who manage their own holds will be allowed by the system to cancel holds at any time during the process.

3. Transferring holds within a cluster

When one of your patrons requests an item from another library in your cluster and the original lending library is not able to fill the hold, you may transfer the hold to another copy of that item within the cluster if there is more than one item record attached to the same bib record as the item that has been requested.

- a) Click on “Search/Holds.”
- b) Search for the item by the barcode.
- c) The bib record will appear with its attached item records. The requested item will be highlighted. If this is the only item attached, then the hold cannot be transferred to another item and must be cancelled.
- d) If there are multiple items, click on “Transfer Holds.”
- e) The message reads, “Transfer 1 hold from ixxxxxxxx to...”

- f) Choose an item from the list.
- g) Click on “OK.”
- h) A message asks if you wish to change the original item’s status to “missing.” Select “Yes” or “No.”
- i) A message asks if you wish to queue a paging slip for later printing. Select “Yes” or “No.”
The hold transfers to the new item.

H. Paging Slips

1. Holds Chart

When a patron places a hold on an item, the hold can become a cluster request; a MOBUS request, or a Pickup Anywhere (PUA) request.

This is indicated by the following chart:

Hold Placed Via:	Situation:	Hold becomes	Hold is processed as
MOBIUS Catalog	Patron is in one cluster Book is in a second cluster Pickup location is in a third cluster	PUA	PUA
MOBIUS Catalog	Patron and book are in the same cluster Pickup location is in a second cluster	PUA, Request to own site	PUA
MOBIUS Catalog	Patron and pickup location are in the same cluster. Book is in a second cluster.	MOBIUS Request	MOBIUS Request
MOBIUS Catalog	Patron, book and pickup location are all in the same cluster	Converts to local cluster hold	Cluster request
Cluster Catalog	Patron , book, and pickup location are in the same cluster	Local Cluster Hold	Cluster Request

As a daily morning process the library that owns the book requested prints paging slips that show requests for materials they own to send out. Paging slips are printed for cluster (within the catalog) requests and MOBIUS or INN-Reach.

2. Holds Workflow Chart

The chart below illustrates the workflow on the different types of holds:

Cluster Request	MOBIUS Request	PUA
Checkout Procedure		
Owning Library	Owning Library	Owning Library
Print cluster page slips (MilCirc or telnet)	Print INN-Reach page slips (MilCirc or telnet)	Print PUA page slips with INN-Reach slips
Check-In (No Patron) mode: scan barcode to put IN TRANSIT	INN-Reach mode: Check Out to Remote Site to put IN TRANSIT	INN-Reach mode: Check Out to Remote Site to put IN TRANSIT
Pickup Library	Pickup Library	Pickup Library
Check-In (No Patron) mode: scan barcode to receive, print pickup notice, place on holdshelf	Check-In (No Patron) mode: scan barcode to receive, print pickup notice, place on holdshelf	PUA mode: Receive Item ; pickup notice queued to patron's home library, put on holdshelf
Circ Desk mode: Check out item to patron	Circ Desk mode: check out item to patron	PUA mode: checkout item to patron
Return Procedure		
Item Returned to Pickup Location	Item Returned to Pickup Location	Item Returned to Pickup Location
Check-In (No Patron) mode: scan barcode to check in; send to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library	PUA mode: Return Item submenu; search and select item, Process , send to owning library
Item Returned to Patron Home Library	Item Returned to Patron Home Library	Item Returned to Patron Home Library
Check-In (No Patron) mode: scan barcode to check in; return to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library	Check-In (No Patron) mode: scan barcode to check in, queue transit slip, send to owning library
Item Returned to Owning Library	Item Returned to Owning Library	Item Returned to Owning Library
Check-In (No Patron) mode: scan barcode to check in; reshelve item	Check-In (No Patron) mode: scan barcode to check in; reshelve item	Check-In (No Patron) mode: scan barcode to check in; reshelve item
Item Returned to Other MOBIUS Library	Item Returned to Other MOBIUS Library	Item Returned to Other MOBIUS Library
n/a	n/a	PUA mode: Return Item submenu; search and select item, send to owning library

3. Printing paging slips (Cluster, Standalone and MOBIUS)

- a) In Millennium Circulation, click "Notices" on the left sidebar.
- b) All clusters use "Saved Notices" where each notice type can be saved. They can either be run by clicking on them or if none have been saved by clicking the "New" button at the top of the screen.
- c) Check that the radio button indicates your institution. Never print "All," as this will print every paging slip for all institutions in your cluster.
- d) Next to "Notice type," click on the down arrow in the box.
- e) Scroll down and click on "Item Paging Slips" to print paging slips for your cluster, or "INN-Reach Paging Slips" to print paging slips for MOBIUS. The option that you choose will appear in the text box.
- f) Click the "Prepare" button at the top of the screen.
- g) A pop-up box appears which allows you to select a printer. Select printer.
- h) A pop-up box appears which displays the printer's status. Choose "Print".
- i) The message "Preparing notices" appears.
- j) Notices may be sorted at this point.
- k) If all is in order, click on "Send Notices."
- l) The "Send Notices" box appears. "Send entries 1 – X to print." Click "OK".
- m) The pop-up box states, "X notices printed. Clear all print notices?" Check notices carefully. If everything is correct, click "Yes." This clears the queue, and the notice information is lost. If there is a problem with the printed notices, do not clear. The problem needs to be addressed. (You may need to contact the MOBIUS help desk to resolve the issue)
- n) Click the "Close" button at the top of the screen if there are no issues to resolve.
- o) A prompt will come up to save the session if you have not made one already. You can either select cancel or save it as a new notice job.

4. Processing requests from a patron in your cluster

- a) The paging slips for cluster libraries will include the title, call number, and barcode.
- b) Find the book on the shelf. If multiple copies of the title are owned, check the barcode to make sure it is the specific requested item.
- c) In the Circulation Desk function of Millennium Circulation, check in the item. A message will come up saying, "Put on holdshelf for (patron's name)." The pickup notice will be printed.
- d) Set the status to "IN TRANSIT TO" (the three letter code for the pickup location), "ON HOLDSHELF," or "CANCEL."
- e) Click on the "In Transit to (location)" button. You may, optionally, print the transit slip and place it inside the book.
- f) Put a book band on the book cover, each cluster has its' preferred color. Don't cover the barcode. Fill in the patron's name (last name first, then first name), and check the institution where the book is being sent.
- g) Place the paging slip in the book.

- h) Print the appropriate label from the MOBIUS label maker:

<http://mobiusconsortium.org/node/4171/>

Insert the label into the window of the MOBIUS bag.

- i) Place the book in the bag along with any other items for this location.
- j) Record the book/bag numbers. {Edit as appropriate for your institution.}
- k) Zip shut and use a plastic tie to secure the bag.
- l) Place with other courier items.

5. Processing requests from a MOBIUS patron

(Note: Some MOBIUS requests will be items requested by patrons at institutions within your cluster.)

- a) Print INN-Reach paging slips. These include the title, call number, and barcode.
- b) Locate the item on the shelf. Check the barcode to be sure you have the exact item requested.
- c) Click on the “INN-Reach mode” on the sidebar in Millennium Circulation.
- d) Select the “Check-out” button.
- e) Scan or key in the item barcode.
- f) A message comes up saying, “Item was requested by a patron (gives the .p number) at a cluster (ex.: 6mrln).” Select “OK.”
- g) A message comes up: “Item has status MOBIUS PAGED and has been cleared.” Select “OK.”
- h) A message comes up: “Send book to above patron at _____ cluster.” Select “OK.”
- i) Sort the books by pickup location – MOBIUS books in one group, cluster books in another.

Choose one of the two following steps:

- 1. **For items with a MOBIUS pickup location**, put a green MOBIUS book band on the book cover. Avoid covering the barcode. Fill out the “To:” space with the patron’s chosen pickup location information. Use the library-specific code found on the paging slip. Fill in the patron’s name but not the due date.
- 2. **For items with a pickup location in your cluster**, put a {indicate local colors/preferences} book band on the front cover. Avoid covering the barcode. Fill in the patron’s name and check the institution chosen as the pickup location on the paging slip.
- j) Insert the paging slip inside the front cover of the book. Do not tape to the book band.
- k) Print the appropriate label from the MOBIUS label maker:

<http://mobiusconsortium.org/node/4171/>

Insert the label into the window of the MOBIUS bag.

- l) Record the book/bag numbers {Edit as appropriate for your institution.}
- m) Zip the bag closed and secure with a plastic tie.
- n) Place with other courier items.

6. Processing PUA (Pickup Anywhere) requests

A PUA loan is accomplished exactly like a regular MOBIUS loan:

- a) PUA paging slips will print out with the INN-Reach paging slips. They will look like a regular INN-Reach slip, but will say “PUA” in large ASCII text across the top.
- b) Locate the item on the shelf. If you own multiple copies, check the barcode to be sure that you have the exact item requested.
- c) Click on the “INN-Reach” mode on the sidebar in Millennium Circulation.
- d) Select the “Check-out” button.
- e) Scan or key in the item barcode.
- f) The patron’s information will appear in the upper right portion of the screen, and a message box will appear with the patron’s “.p” number and a pickup location. Click “OK.”
- g) Another message box will appear which reads, “Item has status MOBIUS PAGED” and has been cleared. Click “OK.” Item status changes to “OFF CAMPUS.”
- h) A third message box appears stating, “Send book to above patron at _____ Cluster.” Click “OK.”
- i) Check-out is complete. The title, pickup location, and cluster due date are displayed.
- j) **Put a salmon-colored PUA book** band on the book cover. Avoid covering the barcode. Fill out the “To:” space with the patron’s chosen pickup location information. Use the library-specific code found on the paging slip. Fill in the patron’s name but not the due date.
- k) Insert the paging slip inside the front cover of the book. Do not tape to the book band.
- l) Print the appropriate label from the MOBIUS label maker:

<http://mobiusconsortium.org/node/4171/>

Insert the label into the window of the MOBIUS bag.

- m) Record the book/bag numbers **{Edit as appropriate for your institution.}**
- n) Zip the bag closed and secure with a plastic tie.
- o) Place with other items to go via courier.

I. Receiving

1. Receiving books delivered by the courier

- a) Cut ties and remove books from the bags. Make sure that each bag is empty before storing since very small items may have been shipped.
- b) Sort books into two groups: items returned to your library and items that have been requested.
- c) Items being returned to your library should be **checked in** to change their status from “In Transit” or “MOBIUS Ret’d” to “Available.” Remove and discard the book bands along with any other paperwork in the books.
- d) Items that have been received can be separated further into cluster (**Cluster colored bands**), MOBIUS (Green book bands) and PUA (Salmon Book bands).

- e) Check in each cluster or MOBIUS item requested by patrons.* The item status will change from "In Transit" to "On Hold Shelf for YOUR CLUSTER "or "Ready for Pickup for MOBIUS."

For PUA items see page below as the check-in process is different.

- f) The patron will be notified by the system that his/her item is ready for pick up. Place the item on the hold shelf in order by the patron's last name.
- g) When the patron arrives to pick up his/her item(s), he/she must present a valid ID card. Proceed with checkout. Record the due date on the book band, desensitize, and give to the patron with a verbal reminder of the due date and the fees and charges for damaged, lost, or non-returned materials.
- h) Items not picked up after seven days on the hold shelf should be returned to the lending library. See the section below on returning unwanted MOBIUS items and cancelling cluster holds.

**Inserting a barcode:*

If, upon checking in a MOBIUS item, you receive the message, "No record found with barcode...", insert the virtual barcode in the following manner:

1. Go into the patron record and click on the "INN-Reach holds" tab.
2. Right click in the empty space in the barcode column for that item.
3. Choose "Insert virtual barcode" from the list of options.
4. Scan the barcode.
5. The item's status will change to "MOBIUS Rec'd."

2. Receiving a PUA (Pickup Anywhere) item

- a) When an item arrives by courier delivery with a salmon book band, check to see that your library code is in the pickup location box.
- b) In Millennium Circulation, select "Pickup Anywhere" mode.
- c) Click on "Receive Item."
- d) Scan the barcode. If the barcode is scanned and there is a message that no record of that barcode exists, use the title.
- e) Click on the "Search" button.
- f) The item will appear in a list which shows the title, barcode, owning site's cluster code, item status, and date of last transaction.
- g) Click in the box to the left of the title if the item is not highlighted. If you have received more than one item, scan all of them.
- h) Highlight all items in the list, and click on the "Process" button. The item status will change from "Shipped" to "Received."
 - a) Put an arrow in the text box, and right-click if you need to see the patron information.
 - b) Click "Show Detail" in the drop-down menu. This will show you everything you need to know about the patron.
- i) Place the PUA item on the hold shelf. There is no need to contact the patron. (The home library will receive notification that the book is ready for pickup and will inform the patron)

J. Returning Items

1. Returning cluster/MOBIUS items to the lending institution

- a) Check in cluster or MOBIUS books that are returned. The status of the book will change to “In transit” (for cluster items) or “MOBIUS Ret’d” (for MOBIUS items).
- b) Once an item is checked in, place it in a MOBIUS bag. Insert an address label in the window of the bag and secure it with a tie.
- c) Process the bag for shipping.

2. Returning a PUA (Pickup Anywhere) item to the lending library

- a) Go to “PUA mode” in Millennium Circulation.
- b) Click on the “Return Item” button.
- c) Scan item barcode and click the “Search” button. (If the barcode will not work, use the title) The item will appear in the list.
- d) Select the item by clicking on the box to the left of the title.
- e) Click the “Process” button.
- f) The item’s status will change to “Returned.”
- g) Cross out your pickup location code and circle the lending library’s information on the book band.
- h) Return to the lending library via the courier in the usual manner.

3. Returning unwanted MOBIUS items

To return unwanted MOBIUS items, or items which have been on the hold shelf seven days past receipt:

- a) Click on the “INN-Reach” button.
- b) Click on “Return Item.”
- c) Scan the barcode.
- d) Return to lending library.

K. Loaning or receiving damaged materials

This section is regarding loan or receipt of materials that are not related to damage cause by the courier, such as loose pages, age, and general wear

1. Loaning

It is up to the lending library whether materials in disrepair are loaned. If your library loans materials that are damaged or in need of repair, record the damage on the book band before sending. You may add a note in the item record. This will alert your library about the damage upon check-in so that the book may be repaired when it is returned.

2. Receiving

If your library receives an item that has been loaned in a state of disrepair and it is **not** noted on the book band, record the damage prominently on the book band and contact the owning library. For example: “Pages 35-52 loose upon receipt. DMY 9/3/07.” This way, the patron cannot be

blamed for the damage when the book is returned to the lending library. If the damage is too severe, the borrowing library may decide to restrict circulation; i.e. patron may use in library only. The decision could be made to not allow the book to circulate at all, to return the book to the lending library, or to request a different copy for the patron.

L. MOBIUS Cluster Codes

Name	Site Code	Full Name
Archway	MOBRE	N/A
Arthur	MOBCE	N/A
Bridges	MOBTE	N/A
Galahad	MOBSE	N/A
LANCE	MOBNE	Libraries and Networks Cooperating in Education
MERLIN	MOBUM	Missouri Education and Library Information Network
Quest	MOBCW	N/A
SWAN	MOBSW	Southwest Academic Network
Towers	MOBNW	N/A
WILO	MOBWE	Western Interlibrary Organization
SGCL	SPRIN	Springfield Greene County Library
WashU	WASH	Washington University
MRRL	MRRL	Missouri River Regional Library
SLU	SLU	St. Louis University

M. MOBIUS Clusters and Member Institutions

Archway East Central College Jefferson College St. Charles Community College St. Louis College of Pharmacy St. Louis Community College	Arthur Columbia College Lincoln University Missouri State Library Stephens College Westminster College William Woods University
Bridges Covenant Theological Seminary Fontbonne University Harris-Stowe State University Kenrick-Glennon Seminary Lindenwood University Logan College of Chiropractic Maryville University Missouri Baptist University Webster University / Eden Theological Seminary	Galahad Mineral Area College Southeast Missouri State University Three Rivers Community College
LANCE Culver-Stockton College Hannibal-LaGrange College Kirksville College of Osteopathic Medicine Linn State Technical College Moberly Area Community College Truman State University	MERLIN University of Missouri - Columbia University of Missouri - Kansas City Missouri Science and Technology University of Missouri - St. Louis
Quest Central Methodist State University Missouri Valley College State Fair Community College University of Central Missouri	SWAN Baptist Bible College Cottey College Crowder College Drury University Ozarks Technical Community College Missouri Southern State University Missouri State University Southwest Baptist University
Towers Conception Abbey Seminary Missouri Western State University North Central Missouri College Northwest Missouri State University	WILO Avila University Metropolitan Community Colleges: Blue River, Longview, Maple Woods, Penn Valley Midwestern Baptist Theological Seminary Rockhurst University Saint Paul School of Theology William Jewell College Kansas City Art Institute
Standalones SLU – St. Louis University MRRL – Missouri River Regional Library SGCL – Springfield-Greene County Library WashU – Washington University	

Hello:

I've scheduled the MAAC meeting for February 23rd. This will be online and will be done with GoToMeeting. I'm also copying this onto the documents page for the meeting.

Below is the link to register for the meeting, which will take you to the registration page. Once you register a confirmation page will appear with the URL to go to. Please note the URL is unique for each person registering, so make sure you save it.

MAAC Online Meeting

Title: "MAAC Feb 23 Meeting"

Date: Wednesday, February 23, 2011

Time: 10:00 AM - 12:00 PM CST

Register now by clicking the link below:

<https://www1.gotomeeting.com/register/970438281>

After registering you will receive a confirmation email containing information about joining the Webinar.

When you attend the meeting you have the option to listen either with headphones or call in by telephone. The phone number is also listed in the confirmation message.

Below is a link that shows the audio setup:

https://www1.gotomeeting.com/default/help/g2w/g2w_user_help.htm#Webinar_Presentation/Audio_Best_Practices.htm

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1-877-3MOBIUS (Toll free in MO) Please let me know if you have any questions or need more information.