

Minutes of the Meeting of the MOBIUS Access Advisory Committee
July 24, 2001

MOBIUS Consortium Office, Columbia, MO

Present: Judy Fox, Washington University, Chair
Carol Warrington, Archway
Joni Blake, Arthur
Per Almquist, Bridges
Gordon Johnston, Galahad
Sharon Upchurch, LANCE
Mary Jo Barbush-Weiss, MERLIN
June DeWeese, MERLIN
Jim Mulder, Northwest
Linda Medaris, Quest
Charlotte Dugan, SWAN
Scott Britton, Washington University
Elise Fisher, WILO
Gary Harris, MOBIUS Consortium Office
Robin Kespohl, MOBIUS Consortium Office
Pat Seavey, MOBIUS Consortium Office
Mark Wahrenbrock, MOBIUS Consortium Office

Before the official agenda began, there was a question asked concerning how the clusters are entering Emeritus Faculty members. The majority of clusters are assigning them their general faculty p-type.

Release 2000 Issues

2. When there are no items currently available for requesting and the Central System allows holds, the user is asked whether they would like to place a hold.

There are also three new Central System options that can be set to completely eliminate holds on items that are not likely to be returned soon. These options can be set by Innovative at the request of the Central System Administrator.

a. The Central System can be set so that items with more than <n> holds cannot be requested, where <n> is a number specified by the Central System Administrator.

The decision was made to set the number of allowable holds to 2. It was verified that local cluster/system holds will take precedence over In-Reach holds.

b. The Central System can be set so that items with a due date more than <n> days from today cannot be requested, where <n> is a number specified by the Central System Administrator.

The decision was made to set this number to 30.

c. The Central System can be set so that items that are overdue more than <n> days cannot be requested, where <n> is a number specified by the Central System Administrator.

The decision was made to set this number to 30.

7. The owning library will be able to recall INN-Reach items from the patron's library and queue a recall notice to send to the patron. If a recall is transmitted to the patron library before the item has even been received at the patron's library, staff at the patron library will be notified of the recall when they receive (check-in) the book. This on-screen notification will show the recall due date. A recall notice will not be queued. Each INN-Reach system will need to decide on a policy for this situation.

If a recall is transmitted to the patron library after the item has been received but before the item has been checked out to the patron, a message will display to library staff at the point of check out. The message will inform staff that the item has been recalled and it will include the recall due date. The staff person will be asked whether to continue with the checkout. If staff continue with the checkout, the regular due date (rather than the recall due date will be assigned). Each INN-Reach system will need to decide on a policy for this situation.

If a recall is transmitted to the patron library once the book has been returned and checked in at the patron library, the owning site recall will be ignored since the book is already in transit back to the owning site.

Following a discussion of the implementation of this rule, and the effect on transactions in various parts of the checkin process, a decision was made to set this at 21 days. A trial will be done between MERLIN and Wash U., once both systems are loaded with Release 2001. Various settings will be tried, to determine the effects. Text of messages will be created at a later date.

8. Libraries will be able to establish different loan rules for INN-Reach Visiting Patrons.

The decision was made that the visiting patron rule should match the MOBIUS Patron Loan Rule of 21 days. Originally the Institutional Loan Rule had been set at 38 days, but was changed due to its effect on visiting patron. Because there is now a separate loan rule for Visiting Patron, it was decided that the Institutional Loan Rule should be changed from a 21-day loan period to a 31-day loan period.

A discussion concerning ID Cards took place. It is vital that each cluster indicate the form of their student ID number on the Mobius Circulation and ILL Contact Page, http://sequoia.lso.missouri.edu/mobius1/maac_contacts.htm. This is necessary because each institution needs to determine that the visiting patron is a legitimate user at their home institution. Every student must know that number when coming to another institution, because not all institutions print the student's ID number on their ID Card.

Each cluster representative was asked to go back to their clusters and have each institution check that the information on the contact page is correct, particular relating to their Visiting Patron ID Format. They also need to stress that students must know their number when using another institution. Distance Education students must know their number to check out from other campuses. Each institution is to communicate to their distance education divisions and/or satellite campuses the need for this number to be given to their patrons.

Election of New Chair

Mary Jo Barbush-Weiss from Merlin was elected the new chair.

Holds Pickup Notices

There was discrepancy noted between the notice text and the loan rules relating to length of time for a hold to be picked up. Because the IN-Reach loan rules need to include transportation time, the rules will be changed to allow 10 days for pickup. The notices will be changed to reflect that change. It will say something similar to the following: "The items listed are now available. They will remain at this location until the date listed below."

Effects of the Load Balancing Table

Until all clusters are on the system it is difficult to determine the effects. Also summer is not a good time to evaluate. WILO will have its status changed, as they have now been online for 6 months. Their status will be made equal to the other libraries that have experience with the system.

Overriding Renewals

It is vital that institutions respect the policies established. When a book is renewed more than once on a local system, neither the Mobius catalog, nor the lending library's catalog are updated. This results in the book being listed on the Items Borrowed Too Long report.

The cluster representatives should convey the problem to their individual cluster members. Please ask every institution to respect the policy of only allowing one renewal.

This led into a discussion of the Mobius Interlibrary Loan Policy. A policy statement concerning renewals will be created at the Mobius Consortium Office and sent around for comments.

Book Bands

Scott Britton will revise the Mobius book bands to include a statement concerning renewals.

Lost Book Reconciliation

At this point in time, only MERLIN and WashU have things to reconcile through the system. These would be items that were overdue prior to July 1, 2000. They will follow the policy created earlier by MAAC. They will recommend changes based on their experiences, if necessary.

A few other non-agenda items were discussed.

Items for Interlibrary Loan ordered through FirstSearch do not indicate the default price of \$100.00 that was previously approved. A review of the Lost Book Policy indicated that it relates to all loans between Mobius institutions, not just those done through the Mobius catalog.

Electronic Reserves should be coded to suppress them from the Mobius Catalog.

Robin Kespohl made a report on the cataloging design committee's discussions. They are investigating whether the URLs should display in the bib. Record, or if it should be in the item record on the local system, or both. They have requested that III investigate the possibility of an indicator, which would distinguish between free, and subscription URLs. This would allow free items to appear in the bib. Records while subscription items could appear in the item record.

Robin also mentioned some other items. She reported on the dropdown boxes listing institutions, which were developed through the cataloging design committee, and a problem with some journal holding displays that III is investigating.

Gary Harris reported that Advanced Keyword Searching would be installed on the Mobius machine on August 2nd. Re-

indexing will take place on August 6 . This will allow more flexibility, and it will assume adjacency when key words are searched.

Future meeting dates were reported. We will meet on Tuesday, Oct. 23, 2001 and Tuesday, January 22, 2002.