

Minutes of the Meeting of the MOBIUS Access Advisory Committee

October 28, 2003

MOBIUS Consortium Office, Columbia, MO

Archway: Fran Stumpf (St. Charles Community College) & Loretta Ponzar (Jefferson College), Arthur: Tom Schultz (William Woods University), Bridges: June Williams (Fontbonne University), Galahad: David Glick (Southeast Missouri State University), Lance: Sharon Upchurch (Culver-Stockton College Library), Merlin: Mary Jo Barbush-Weiss (University of Missouri-Rolla) & June DeWeese (University of Missouri-Columbia), Quest: Marian Craig & Linda Medaris (Central Missouri State University), Towers: Vicki Wainscott (Northwest Missouri State University), Mary Chamberlain & Donna Bacon (Springfield-Greene County Library), Swan: Charlotte Dugan (Southwest Missouri State University), Washington University: Scott Britton (Washington University), WILO: Elise Fisher (William Jewell College), MCO: Jim Dutton

The meeting was called to order by chair, Loretta Ponzar.
Minutes of the July 22, 2003 meeting were approved.

MCO UPDATE – Jim Dutton

New member Baptist Bible College will begin profiling November 21, 2003, with a projected go-live date of March 31, 2004.

Phase 3 was loaded on the INN-Reach server this morning, which completes the Phase 3 updates.

The State Historical Society Newspaper holdings were loaded into Merlin & MOBIUS.

CLUSTER REPORTS

Merlin – Discovered a discrepancy between the number of items on hold shelves and not picked up in the month of November; these are not reflected in the circulation statistics.

Swan – began a circulation standards document; have one for reserves

Archway – St. Louis College of Pharmacy still continues to come on board.

Wash U – Has received a couple of pickup anywhere bookbands on regular MOBIUS books. Pickup anywhere is not yet implemented so please don't use these bookbands just yet.

Arthur – Working on turning on automatic authority control.

OLD BUSINESS

Load-Balancing

Archway, Springfield, and WILO have been notched down since St. Louis College of Pharmacy, Rockhurst, and Midwest Baptist have just come on. This should change in December.

Non-Returnable ILL/Lenders of Last Resort Review

St. Louis University – Health Sciences was added by consensus. The list now consists of: Kirksville Osteopathic, University of Missouri-Columbia, Logan Chiropractic, St. Louis University - Law, St. Louis Community College, Truman State, St. Louis University – Health Sciences, and University of Missouri-Columbia Health Sciences. It was noted that University of Missouri-Kansas City Health Sciences is not counted separately. Almost all the health science libraries are on this list.

MAAC members are to let their cluster institutions know about the lenders of last resort list for non-returnables. It was recommended the list be placed on both Statistics and Policies web pages.

KCOM, SLU-Law, and SLCC are well under the 2.0 figure and will be asked if they want off this list.

Reconciliation Process

One cannot always tell whose cluster these abusing patrons belong to when materials are overdue, so they can't be called. June DeWeese proposed each cluster have one contact person to ask regarding these patrons, similar to the cataloging contact list. Clusters are to identify who this contact will be and email the name to Loretta Ponzar.

Pick-up Anywhere Update

The first round of testing revealed software problems. The testers will meet after this meeting to discuss when testing will begin again. It is unlikely the rollout will happen before the end of spring semester. Additionally, training will need to be planned.

NEW BUSINESS

Decisions Concerning Phase 3 Enhancements

There were five items requiring decisions on Phase 3 enhancements:

- 1) Requesting to Own Site. Vote was tabled due to confusion on the definition of "site" within MOBIUS; Jim Dutton will email more information.
- 2) Renewal at Owning Site. Scott Britton moved and Sharon Upchurch seconded to implement. Discussion concluded this would benefit the visiting patron. Motion carried.
- 3) Local server can prevent the printing of INN-Reach paging slips for item already checked out. Sharon Upchurch moved and Tom Schultz seconded to implement as long as it does not affect local tables. Discussion concluded these items would end up on a paged too long list if not printed. Motion carried.
- 4) Patron institution can be suppressed from display in the list of affiliated institutions within the Web and character-based OPACs. It was decided this was not applicable to MOBIUS because institutions can't opt out of Visiting Patron.

5) A Visiting Patron institution can be suppressed from display in the list of affiliated institutions within the Millennium and character-based Visiting Patron mode. Sharon Upchurch moved and David Glick seconded to accept this enhancement. It was decided this would only apply to Springfield-Greene County and should be enabled for them. Motion carried.

Springfield-Greene Update - Mary Chamberlain & Donna Bacon

They will be on two months next week. The green bookbands have received the most discussion.

They receive a lot of MOBIUS cancelled requests and patrons need to request again. Library staff is placing the re-request on behalf of the patron. There is confusion about how long a "MOBIUS cancelled" stays on the record. MOBIUS staff present said the request should go on to the next available copy which is unseen by the owning library where the request was cancelled.

There is a problem with the complete location not appearing on the bookbands. They have several locations within their system, but the only LANTER delivery stop is at the main location where all the materials are sorted. Often the SGCL is the only thing on the bookband, and it needs to include the location, e.g. SGCL-Brentwood, etc. Please take it back to the clusters to include the whole name on the bookbands.

A recommended agenda item for next meeting would be to review paging procedures. Look at it ahead of time for discussion. We may want to break it into Millennium-Circ vs. character base.

The ILL department is still getting traditional ILL requests which are being denied because they are coming from a MOBIUS institution.

They will begin promotion in the community soon.

Additional Lanter Bags

We are adding institutions and institutions are adding stops. As a result, bags are being dispersed to more locations with fewer items in them. The original formula was based on an Indiana model. Additional bags have been ordered several times. The result of the last audit, accounted for 3,204 bags out of 4,300 total. This audit took place before Springfield-Greene County came on board, who purchased their own bags. Last year there were 503 more bags than in this count.

June DeWeese moved and Scott Britton seconded to request more bags from next year's budget to bring the total to the original 4,300 count. Motion carried.

It was pointed out that some institutions do not use the bags but use the Rubbermaid totes instead. These totes are purchased from their own budgets and have no impact on the MOBIUS budget. These totes should never leave the MERLIN and Wash U circuit.

MAAC ANNUAL REVIEW OF MOBIUS ILL POLICY

George Rickerson joined the meeting. According to the bylaws, the MAAC is to conduct an annual review of the MOBIUS ILL policy and report this during the last quarter of the year. The committee examines this data as a regular agenda item at every meeting.

George reported the general feeling in the executive committee is to try to level the traffic amongst members rather than go through a compensation model. The compensation model was controversial when it came up in the executive committee meeting.

George requested the following:

- 1) Poll member institutions to find out what their policy & practices are as regards reporting statistics. Do they report monthly or on another cycle?
- 2) Do the member institutions know about the lender of last resort list, and are they respecting it?
- 3) Do they use any software to gather statistics?

Scott Britton volunteered to draft a form; WILO will serve as beta site. It will then be distributed to MAAC cluster reps, who in turn will gather the information from their member institutions. The information is needed by the next executive council meeting to be held December 3, 2003. The information will need to be returned to Scott by November 26, 2003.

Millennium Offline Circulation – Jim Dutton

Jim demonstrated an offline circulation module for the benefit of members. If we are interested the feature must be turned on at the cluster level and authorizations will be limited. The consensus at this meeting was to authorize Jim to turn the feature on and communicate to us about it including specific procedures.

Next meeting

The next meeting will be held February 17, 2004.

Action Items:

- 1) Email Loretta regarding the point person for billed & lost items.
- 2) Remind cluster members to include the entire pick up locations on the book bands.
- 3) Loretta will request additional bags be budgeted for next year.
- 4) Scott Britton will be sending a poll that will need to be returned prior to November 26, 2003.
- 5) Examine paging procedures.