

MOBIUS Maintenance Operations

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Overview

RMO	Frequency	Archway	Arthur	Bridges	Galahad	LANCE	MERLIN	MRRL	Quest	SGCL	SLU	SWAN	Towers	WASHU	WILO
Authority Processing (MARS)	Quarterly	Jan, Apr, Jul, Oct	Jan, Apr, Jul, Oct	Feb, May, Aug, Nov	Mar, Jun, Sep, Dec	Feb, May, Aug, Nov	Jan, Apr, Jul, Oct		Mar, Jun, Sep, Dec			Jan, Apr, Jul, Oct	Mar, Jun, Sep, Dec		Feb, May, Aug, Nov
Bib & Order Loads	As needed			EW, LU			UMC		UCM			OTC, SBU	MWSU		Avila, MBTS, MCC-LV & MW, RU, WJU
CatExpress Loads	As needed	JC		LCC	MAC, TRCC	HLG, MACC			MVC, SFCC			Cotley, Crowder, FIPP, OTC	NCMC		KCAI
Clear Link Maintenance Report	Weekly	X	X	X	X	X	X		X			X	X		X
Daily Backups	As needed	X	X	X	X	X	X		X			X	X		X
eBrary Loads	Monthly						MST, UMC						NWMSU		MBTS
EBS Upload and Rapid Update	Weekly (All institutions)	X	X	X	X	X	X		X			X	X		X (Except MCC)
Full Backups	Daily	X	X	X	X	X	X		X			X	X		X
Global Rearrange & Update	Monthly	X	X	X	X	X	X		X			X	X		X
Headings Reports	Weekly	X	X	X	X	X	X		X			X	X		X

INN-Reach Too Long Reports	Biweekly (1st & 15th)	X	X	X	X	X	X	X	X	X	X	X	X	X	X
LHR Batch Upload	Quarterly (Same months as Authorities)	JC, SCC, SLCC	CC, LU, SC. WC. WW	Cov, Font, LCC, WEB/ED	MAC, SEMO, TRCC	CS, KCOM, LSTC	UMC, UMC- Med, UMKC, UMSL		CMC, CMSU, MVC, SFCC			Cotter, Crowder, DU, MSSU, OTC	CA, MWSU, NCMC, NWMSU		AU, MBTS, RU, WJU
MARCIVE Full Bib Record Load	Monthly				SEMO		UMC					MSU			RU
MARCIVE Shipping List Load	Weekly				SEMO		UMC					MSU			
MOBIUS Borrowing & Lending Statistics	Monthly	X	X	X	X	X	X	X	X	X	X	X	X	X	X
MOBIUS Virtual Patrons	Biweekly (1st & 15th)	X	X	X	X	X	X		X			X	X		X
OCLC Gov Docs Load	Monthly								UCM						
Patron Loads	Weekly	X	X	X	X	X	X		X			X	X		X
PUA Pickup & Cancellation Notices	Daily	X	X	X	X	X	X		X			X	X		X
Scope Authority Records	Daily	X	X	X	X	X	X		X			X	X		X
Serials Solutions	Monthly						MST, UMKC								

eBooks Loads															
Serials Solutions Journals Loads	Monthly						MST, UMKC, UMSL		UCM						RU
TOC Enrichment	As needed	X					X								
YTD/LYC Rollover	Annually	July 1				July 1	January 1		July 1			August 1	July 1		July 1

Last updated 8-6-2010

Daily

These operations are performed on a daily basis.

Full Backups

All MOBIUS systems are fully backed up and the tapes verified every morning beginning at 2:00 a.m. System control will be suspended and transactions will be queued during the backup. Daily backups are performed by MCO OHD staff when the transaction file capacity exceeds 60%.

PUA Hold Cancellation & Pickup Notices

Request to Own Site Pickup Anywhere Hold Cancellation and Pickup notices are processed for every cluster, and are made available via email to the cluster listservs or designated distribution lists.

Scope Authority Records

Authority records do not automatically scope when headings are changed or new authority records are added to the database. Scoping these records confirms whether holdings exist based on the patron's search parameters, and provides "see" references.

Weekly

These operations are performed on a weekly basis.

Clear Link Maintenance Report

All records attached to new or edited bibliographic records are rearranged alphabetically by location, and updated by synchronizing the locations of the attached records to locations in the bibliographic records. This maintains the scope and organization of records. III automated process. MCO verifies that daily link maintenance ran during the week; frees any busy records, and clears the report.

EBS Upload and Rapid Update

The ICODE1 fixed field in item records is set to the appropriate code by MOBIUS libraries to flag records needing to be uploaded to OCLC as new holdings by MCO, and to flag holdings to be sent to OCLC for cancellation. MCO uploads holdings information (both adds and cancels) to OCLC for all libraries with flagged items (ICODE1 value). MCO then rapid updates the ICODE1 values after files have been sent. An OCLC report of records received is forwarded to cluster listservs the following day.

Headings Reports

Headings Reports based on location codes are run and distributed to the respective schools. Additional reports are compiled for the entire cluster and distributed, usually on a rotational basis, for resolution.

MARCIVE Shipping List Load

Brief bibliographic and item records are retrieved from MARCIVE for customers receiving GPO service and loaded. Load statistics are forwarded via email to the libraries or distribution lists.

Patron Loads

Files of patron records are compiled and transferred by member institutions to MCO. These files are retrieved, preprocessed, and loaded into the Innovative system. Load statistics are forwarded via email to the libraries.

Biweekly

These operations are performed on a biweekly basis.

INN-Reach Too Long Reports

INN-Reach reports for each cluster are compiled and posted on the MCO Web site. This is an in-house automated process.

MOBIUS Virtual Patrons

A report of patrons with virtual MOBIUS (INN-Reach) records for each cluster are compiled by MCO and posted on the MCO Web site.

Monthly

These operations are performed on a monthly basis.

eBrary Loads

MCO retrieves files of eBrary bibs and items, preprocesses the files, and loads them into the Millennium system. Load statistics are forwarded to the libraries.

Global Rearrange & Update

All records attached to bibliographic records are rearranged alphabetically by location, and updated by synchronizing the locations of the attached records to locations in the bibliographic records. This maintains the scope and organization of records. MCO OHD staff run this process over the entire bibliographic records file.

MARCIVE Full Bib Record Load

Full bibliographic records are retrieved from MARCIVE and loaded. The full bibliographic records overlay the shipping list records loaded earlier, and load statistics are forwarded to the libraries.

MOBIUS Borrowing & Lending Statistics

Circulation statistics for each institution in each cluster are gathered and compiled by MCO. This includes statistics for Patron Activity (checkouts) by library. All circulation statistics are posted on the MCO Web site.

OCLC Gov Docs Load

Full Government Document bibliographic records from OCLC are preprocessed and loaded into the Millennium system. Load statistics are forwarded to the library.

Serials Solutions Loads

MCO retrieves files of Serials Solutions bibs and items, preprocesses the files, and loads them into the Innovative system. MCO may delete the Serials Solutions deletes records upon request. Load statistics are forwarded to the libraries.

Quarterly

These operations are performed on a monthly basis.

Authorities Processing (MARS)

Bibliographic records cataloged in the previous quarter are sent to a vendor to process authority records and update the bibliographic records. The bibs. and new authority records are returned and loaded, and accompanying HTML reports are distributed. Review files of authority records to be added to or deleted from the authority history file are compiled. Once the record counts are confirmed, MCO purges the records to be deleted and updates the ACode2 for the appropriate index for the added authorities.

LHR Batch Upload

Member institutions code their new or updated checkin records for upload to OCLC. MCO creates files of the records, outputs the files from the Innovative system, and sends the files to OCLC.

Annual

These operations are performed on an annual basis.

YTD/LYC Rollover

The total in the YTD (year-to-date) circulation field is rolled over into the LYC (last year's) circulation field and LYC zeroed out in preparation for the new fiscal/statistical year.

As Needed

These operations are performed as needed

Bib & Order Loads

MCO retrieves files of bib and order records from member institutions or vendors and preprocesses and loads the records into the Innovative system. Load statistics are forwarded via email to the libraries.

CatExpress Loads

CatExpress is a method of downloading OCLC records into the Innovative system. Often used by smaller institutions, libraries mark records in OCLC, MCO retrieves and loads the records, and forwards the load statistics to the library. CatExpress sites notify MCO when a file has been produced by OCLC.

Daily Backups

All MOBIUS systems are fully backed up and the tapes verified every morning beginning at 2:00 a.m. System control will be suspended and transactions will be queued during the backup. Daily backups are performed by MCO OHD staff when the transaction file capacity exceeds 60%.

TOC Enrichment

Bibliographic records cataloged by participating libraries during the previous quarter are sent to Blackwell's to have tables of contents added. The enriched records are then returned and loaded into the Millennium system.

1. Introduction

This is a Service Level Agreement between MOBIUS, a nonprofit corporation in the state of Missouri, and [member name]. For organizations which were members of MOBIUS prior to July 1, 2010, this document replaces the original *Memorandum of Understanding* or the *Cooperating Partner's Agreement*, and the *MOBIUS Service Policy Agreement* (dated February 26, 1999).

Service Provider:

MOBIUS
3212A Lemone Industrial Blvd.
Columbia, MO 65201
877-366-2487 Voice (Toll-free in Missouri) 541-264-7006 Fax
<http://mobiusconsortium.org/help-desk>

Member:

[Name]
[Address]
[phone number]

2. Scope

MOBIUS, a nonprofit corporation in the state of Missouri, licenses software products, negotiates contracts, and provides services on behalf of member libraries in support of efficient library operations and cost-effective sharing of library resources. The MOBIUS Board of Directors and the staff of the MOBIUS Consortium Office (MCO) are committed to delivering quality customer service and effective technological solutions in support of the organization's mission and goals. To ensure the best possible support, this Service Level Agreement outlines specific services, priorities, and responsibilities related to the provision of services and products included in MOBIUS membership fees and assessments.

This document is intended for use in conjunction with any additional and separate agreements that may exist between MOBIUS and the member library for specific services or products outside the scope of this document. MOBIUS does not support software applications for members the acquisition of which are not negotiated under its auspices.

This Service Level Agreement is subject to modifications in response to changes in technology services and support needs. Any changes to this agreement must receive approval from the MOBIUS Board of Directors prior to implementation.

3. Terms

The initial term of this Service Level Agreement between MOBIUS and [member name] covers the period July 1, 2010 through June 30, 2011. Thereafter, it is renewed automatically on July 1st of each year unless a member resigns its membership in MOBIUS according to the provisions of Section 2:18

of the version of the *MOBIUS Bylaws* in effect at the time of resignation. Upon such resignation, this agreement is terminated.

- 4. Systems Services Provided** – MOBIUS provides, or contracts to provide, the following services in support of member library operations. Such services apply to the operation and maintenance of the MOBIUS Union Catalog, as well as all other servers, services, or computer systems hosted or managed by MOBIUS, unless otherwise specified in a separate agreement.

4.1. Availability

All systems will be available to users 24 hours per day, 7 days per week, 52 weeks per year. In the event that it is necessary to schedule non-maintenance downtime on a MOBIUS system for any reason, MOBIUS will inform affected members as far in advance as possible, but no less than 48 hours, except in the case of an emergency over which MOBIUS has no control. In the case of unscheduled downtime, MOBIUS will inform members of the problem and the expected time of resolution as soon as possible using the most appropriate form of communication.

4.2. Environment

MOBIUS will ensure that all computer hardware is located in an environment with appropriate power resources, including backup power, air conditioning, and network capacity. Also, that all appropriate security measures are in place to ensure that hardware, software, and data are protected from all threats, both physical and electronic. Such measures include, but are not limited to, intrusion detection, virus scanning, and data backup procedures. MOBIUS also ensures that appropriate disaster recovery guidelines and procedures are in place in the event of a disaster of any kind.

4.3. Monitoring

Basic operational monitoring and periodic testing of systems for proper functioning is provided for all systems operated and managed by MOBIUS. A monitoring system contacts the on-call operations manager when error conditions or security issues are detected.

4.4. Hardware

MOBIUS acquires, installs, and maintains all computer hardware, such as servers, for systems it hosts or manages. MOBIUS also replaces all servers on a rotating three-year cycle, selects new or replacement hardware, maintains an inventory of hardware, and manages hardware warranties.

4.5 Software

MOBIUS performs, or contracts to be performed, routine software maintenance tasks as required to ensure maximum operational efficiency of all systems and products hosted or managed by MOBIUS. New software releases to systems are installed in as timely a manner as possible with appropriate prior communication with participating member libraries. Testing for current software updates and new software products is conducted by MOBIUS prior to implementation with the involvement of selected member libraries.

4.6. Routine Data File Updates and Maintenance

MOBIUS generally performs routine data file maintenance for all systems on Sundays from midnight to 5:00 am. A schedule of routine maintenance operations is maintained on the MOBIUS web site. In general, requests from member libraries for changes to existing system operations, data, and structures not on this list, such as changes to tables, displays, and profiles, are **not** considered routine maintenance and requests for such changes may incur charges, unless they are the result of error on the part of MOBIUS. For more information on charges for such changes, please see the *MOBIUS Policy on Charges for Services*.

MOBIUS contracts for maintenance of controlled vocabulary data on systems it hosts or manages, including the MOBIUS Union Catalog; such maintenance is often referred to as "authority control." The cost of such data processing is shared by all members and is included in annual assessments. However, the processing of large files for items acquired for the exclusive use of a single member, such as electronic books, may incur separate costs. For more information on such situations, please refer to the *MOBIUS Policy on Charges for Services*.

- 5. Help Desk –** MOBIUS operates a Help Desk to receive and resolve reports of problems affecting all of the systems hosted or managed by MOBIUS, including the MOBIUS Union Catalog. When a problem is reported, Help Desk staff record and analyze the problem, take action to resolve it, and provide updates on the status of its resolution as necessary. MOBIUS uses an automated system for tracking and managing reported problems and provides access to information from this system to staff at member organizations. Requests for service or assistance are also entered into the same system for attention by MOBIUS Consortium Office staff.

Help Desk Hours of Operation

Monday- Friday, 8:00 am-5:00 pm, Central time
(Closed during posted holidays)

Contact the Help Desk

Phone: 877-366-2487 Voice (Toll-free in Missouri)

Email: help@mobiustconsortium.org

Web: <http://mobiustconsortium.org/help-desk>

Help Desk staff make every effort to resolve a problem or satisfy a request as soon as possible. Priorities are assigned by Help Desk staff depending on the severity of the problem, the severity or complexity of other pending problems, and the time/date a report or request is received.

Problem Severity	Initial Response Time	Follow-up
Level 1 – Normal Business Hours	Within 30 minutes of notification 100% of the time	Hourly
Level 1- Off hours	Within 1 hour of notification 95% of the time	Hourly
Level 2 – Normal and Off Business Hours	Within 3 hours of notification 100% of the time	Daily
Level 3 – Normal and Off Business Hours	Within 1 working day 100% of the time	Weekly

Severity Level 1 – Major impact – defined as a problem that causes complete loss of service to the production environment and work cannot reasonably continue. Such a problem generally results in a large number of users who cannot access the system and critical functionality is not available.

Severity Level 2 – Significant impact – defined as a problem when processing can proceed but performance is significantly reduced and/or operation of the system is severely limited; some functionality may be unavailable.

Severity Level 3 – Minor or no impact – defined as a problem that causes minimal or no loss of service or functionality, is an error for which a workaround is available, is a software enhancement, or is a documentation error.

6. **Training** - MOBIUS provides multiple training opportunities:
 - Complete training for each module in new system implementations;
 - Training for new staff in current member organizations when justified by collective demand;
 - Training for new software releases when the size or complexity of the release warrants it;
 - Computer-based training, such as mini-sessions, intended primarily to refresh knowledge;
 - Training by vendors, coordinated by MOBIUS, to support products licensed by MOBIUS;
 - Sessions provided by MCO staff or staff from member organizations at conferences.
7. **Documentation** – MOBIUS provides documentation for use with the systems it supports when such documentation is available from the system vendor. Documentation, or links to documentation, is provided on the MOBIUS web site.
8. **Network Connectivity** – MOBIUS contracts for network connectivity to all the computer hardware used to support the systems it hosts or manages as well as for network connectivity for the MOBIUS Consortium Office. However, network connectivity from member locations to the Internet are the responsibility of each member. MCO staff will assist members in troubleshooting network connectivity issues but it is ultimately the responsibility of the member to resolve all issues with its Internet Service Provider (ISP) and the network administrator of its local or wide area network.
9. **Delivery Service** – MOBIUS contracts for the delivery of library materials to each member library on a daily business basis (Monday through Friday) all year. The main library of each member organization participates in the delivery service as evidence of its commitment to resource sharing. The cost of the delivery service for the main library is included in the annual MOBIUS membership fee, unless the member qualifies for delivery service through the Missouri State Library. A member may request additional delivery stop(s) at additional location(s) within its organizational structure for additional fee(s). Such additional delivery stops may be five days a week or fewer with the cost pro-rated. MOBIUS posts on its web site the day(s) each library is closed as notification that library items will not be delivered or picked up on specific day(s) at that specific location.
10. **Communication** – In order to provide timely and useful information and promote member satisfaction, MOBIUS is committed to multiple avenues of effective communication. MOBIUS

maintains an extensive web site at <http://mobiusconsortium.org> which includes *MOBIUS Bylaws*, policies, procedures, user documentation, member lists, committee meeting agendas and minutes, etc. MOBIUS also maintains multiple distribution lists and blogs, arranges and supports member meetings both in-person and electronically, provides email updates, and publishes an annual report and newsletter. For the last few years MOBIUS has also sponsored an annual conference with support from a Library Services and Technology Act (LSTA) grant from the Institute of Museum and Library Services administered through the Missouri State Library.

11. Member Responsibilities - Members are responsible for:

- Paying all fees and assessments in a timely manner
- Complying with *MOBIUS Bylaws* and all policies and procedures as found on the MOBIUS web site
- Acquiring local computer hardware with sufficient capabilities to conduct library operations from MOBIUS hosted or managed systems successfully
- Acquiring network connectivity from the member location(s) to the Internet, including access through a firewall
- Communicating with MCO **before** acquiring or licensing products for which MOBIUS will be asked to host, manage, or provide data output
- Communicating with the MOBIUS Help Desk **before** contacting any vendor for problem resolution or system enhancement
- Gathering as much information about a problem **before** contacting the MOBIUS Help Desk for problem resolution
- Maintaining and securing local system authorizations
- Updating data files from reports generated by MOBIUS data processing activities, such as authority control processing
- Notifying MOBIUS when a library is closed and will not send or receive materials from other libraries

12. Remedy – Should a member organization determine that MOBIUS is not meeting the terms of this agreement, the member agrees to follow the course of action listed below:

First, contact the MOBIUS Executive Director via phone, email, or in writing and describe, in detail, the source(s) of dissatisfaction or deficiency. If, within thirty days of contacting the MOBIUS Executive Director, the member is not satisfied, the member should,

Second, describe the deficiency in an official letter addressed to the Executive Director of MOBIUS, with a copy sent to the President of the MOBIUS Board of Directors. If, within sixty days of writing this letter, the member is not satisfied, the member should,

Third, submit a request in writing to the MOBIUS Board of Directors for formal dispute resolution services from the Center for the Study of Dispute Resolution at the University of Missouri, School of Law.

APPROVED AND ACCEPTED:

For [Member name]

Signature: _____

Date: _____

Print Name: _____

Title: _____

For MOBIUS

Signature: _____

Date: _____

Print Name: _____

Title: MOBIUS Executive Director

DRAFT