

# PROCEDURES FOR PROCESSING MOBIUS REPORTS

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## INTRODUCTION

Several reports are available to track INN-Reach requests. To generate an INN-Reach report, select the following options from the Main Menu:

- C > CIRCULATION subsystem
  - A > ADDITIONAL circulation functions
    - O > INN-Reach functions
      - ; I > INN-Reach Reports and additional functions

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.

## REPORTS PRODUCED LOCALLY AT EACH LIBRARY

### PAGED TOO LONG REPORT (MOBIUS PAGED Status)

1. Owning libraries should generate this report at least once a week. This report represents items that have been paged at the owning cluster/library for more than 3 days.
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 (REQUESTED Status)

1. Borrowing libraries should generate this report at least every 2 weeks. 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. 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. Items 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 (IN TRANSIT Status)**

1. Borrowing libraries should generate this report at least every 2 weeks. 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.

### **RECEIVED TOO LONG REPORT (MOBIUS RECVD Status)**

1. Borrowing libraries should generate this report every 2 weeks. This 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 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 MOBIUS 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 Lanter 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**

### **INSTITUTIONAL OVERDUES REPORT (INNREACH Overdue)**

1. On the 15th day of each month the MOBIUS Office will generate the institutional overdues reports for all locations for items overdue at least 45 days. The report should be sorted by Item Location. The lists will be mounted on a secure portion of the MOBIUS website. 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. The lists will be mounted on a secure portion of the MOBIUS website. 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 (MOBIUS RETD Status)**

1. On the first and fifteenth day of the month, or the first business day thereafter, the MOBIUS Office will generate a list of old RETURNED items sorted by date. The lists will be mounted on a secure portion of the MOBIUS website. 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 received from other clusters, follow the steps listed below:
  - a. Access the local catalog and record the call number for any items for which your library is the home library. If the item has a status of "not checked out", follow step "c" below.
  - b. If the item indicates a status of not checked out in the owning library catalog, notify the borrowing library so the virtual item record can be deleted from the patron's record. This can be done by accessing the check-out function, calling up the patron's record and using the "-+" option. This will show an option to delete virtual item records. 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.
  - c. 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.
  - d. If the item is not found, send a note to the patron's library asking staff to search the 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's library should notify the owning library that the book was not found.
  - e. 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
3. For books not found after 1 year, the patron's library is responsible for reimbursing the owning library for the book.