

ARCHWAY CLUSTER MEETING MINUTES

St. Louis Community College Meramec

March 9, 2000

HOMEWORK FOR NEXT MEETING (see notes below):

- *SCOPE-3 - Robin*
- *CB*
- *C-1 - due next week (if changes)*
- *C-2 - due next week (if changes)*
- *C-3*
- *C-4*
- *C-5*
- *C-6*
- *C-8 - post drafts on cluster listserv*
- *C-9 - due next week*
- *C-10*
- *C-12*

ATTENDING

Members: Linda Bigelow, Cathye Dierberg, Loretta Ponzar, Kathy Schlump, Fran Stumpf, Paul Talaski, Stephanie Tolson, Carol Warrington

Guests: Ying Li - SCCC, Pat Williams - SLCC-FV

MOBIUS: Robin Kesphol

ARCHWAY MEETING

- Cathye Dierberg called the meeting to order at 9:20 a.m.
- Carol Warrington made a motion, seconded by Fran Stumpf, to adopt the Archway logo prepared by Jim Kuchar and presented by Jefferson College. Motion carried unanimously. Members asked that Jim receive thanks for his creative contribution.
- Cathye led a preliminary discussion on how to use the Reserve Index, which sees every location. We need to develop procedures for data entry for course titles and instructor names for consistency. A subcommittee will be appointed at a later date to develop the guidelines for data entry.
- Cathye reported that George Rickerson is gathering information on API scripting and will be sharing it with us as it becomes available.
- Stephanie reported on the MOBIUS Consortium meeting held last Friday. The topic that generated the most discussion was the Access Advisory Committee recommendation on visiting patrons. The vote was tabled until the June 1 meeting. The MOBIUS annual conference will be held June 2 in Columbia. We are encouraged to bring staff to the conference. There is no registration fee.

MOBIUS MEETING

- **MOBIUS Update**
 - Robin also referred to the Access Advisory Committee report to the Council.
 - She noted that the Catalog Development Advisory Committee will meet Friday to discuss the master

record concept, advanced searching, and the 856 problem.

- The MCO has position openings. They will not *recruit* from MOBIUS libraries, but *will* accept applications from MOBIUS library staff members.
- The MCO management team held a two-day retreat focused on strategic planning that went very well.
- MOBIUS III Implementation Coordinator has changed and is now Catherine Kott. She is trying to rearrange schedules to free up a serials trainer for July but is not overly optimistic because Mill-Serials is such a new project that not everyone is trained yet. Robin will see if serials training on the character-based serials module would be available for St. Louis Community College because they are very concerned about the two-month lag time between loss of NOTIS and implementation of III serials.

- **Review Items**

- Location Codes**

- Okay*

- Location Mapping**

- Okay*

- Location Served**

- Okay*

- Itype Mapping**

- Okay - Jefferson had two Itypes to add to the Jefferson table*

- **Worksheet Review**

- BIB-1: INNOPAC Field Group Labels and Tags - Standard**

- Okay - GovDoc changed to SUDOC #*

- BIB-3: BCODE Values**

- Okay - Deleted Mixed Materials, added an "s" to Video (Videos)*

- Note: In BCODE3, can't suppress only to local level; has to be seen by Archway. However, can suppress at MOBIUS level.*

- BIB-10: Call Numbers**

- Okay*

- OP-1: Character-Based OPAC Display**

- Okay*

- OP-2: OPAC Limiting Options**

- Okay - Delete "W" WHERE located*

- OP-3: OPAC Options Set by Library**

- Item 5 - "Do not allow" box needs to be "unchecked"*

Item 28 - Cluster agreed to include Personal ID Num (PIN) in patron record

(not case sensitive; concerned about privacy issues)

OP-4: Order of Fields in Public Display

Okay - Robin added "Library Has" on page 3

OP-5: Public Display Labels

On page 4, delete 086-SUDOC # as this list is for differences only; SUDOC # is already listed on staff display.

LIB-2: Source of Library's Records

Increased approximate number of patron records to 80,000.

Students will be loaded with an expiration date.

Patrons can be loaded and deleted as frequently as needed.

Patron fields can be protected from overlay.

SA-1: Statistic Groups

Go to CSDIRECT.iii.com, FAQ, Network, Firewalls, Start a, item 4 (Jefferson and East Central)

There is a problem in gathering statistics if IP addresses are behind a firewall.

SA-2: Locations Served

(not working on yet)

SA-3: Login Groups

Will follow up later

SA-4: Login Setup

Okay

SCOPE-3: Scoping Options

Robin will research for next meeting.

• Circulation Worksheets

CA: Circulation Periods

Must use Julian calendar for semester and one year options.

Add:

Three hours

Overnight

Four days

Non-Circulating

CB: Loan Rules

Purpose is to start thinking about loan rules.

IMPORTANT: *Can ADD rules, but NEVER delete a rule; it changes the numbering for everyone below you on the list!! However, a rule could be inactivated or replaced.*

Prepare for next meeting. *We can send samples to Robin ahead of time to make sure we're on the right track.*

C-1: Patron Types

Review and send any changes to Robin next week.

C-2: Item Types

Review and send any changes to Robin next week.

C-3: Rule Selection Table

The system will start at the bottom of the table and work up until it finds a rule that applies. Therefore, when filling out the table, the first item listed should have the broadest application. The last item listed should be the most restricted.

Prepare for next meeting. *We can send samples to Robin ahead of time.*

C-4: Patron Block Table

"Max Fine" includes replacement cost

"Max Items" includes concurrent checked-out items, but not INNReach items.

"Max Holds" are concurrent

"Max ILL" not relevant; insert "999"

"Max Item a,b,c,d" are restrictions to general rules that are set at cluster level.

We need to think about what Itypes and/or Locations need to be restricted (such as reserves or reference or videotapes) The definition of what to restrict and for how long is made at the cluster level; the application of the restrictions are up to the local library.

C-5: Library Calendar - Days Closed

If your library will be open (such as during spring break) but you do not want items to become due on particular days, enter those days as closed. The system will still let you check out items on the pseudo-closed days.

Begin with June 1, 2000. Consider entering at least through June 30, 2001.

If using a wildcard for location, the first character should be your library code (j????)

C-6: Library Calendar - Hours Open

Enter hours for standard days open (use military or 24-hour time).

Enter hours for days open but hours vary from standard.

Prepare for next meeting

C-7: Format of Circulation Notices

Group agreed to accept the default format for the cluster; easy to change.

C-8: Text of Circ Notices

*Prepare text for each kind of notice we want to send (see sample notices provided by Robin). Again, once created, **don't delete** because it will affect those listed below you.*

Would be useful to post draft messages on cluster listserv prior to next meeting.

C-9: Return Addresses

"Location Name" is your college.

"Line 1" is your library name

Add: e-mail Source - (recommends a circ e-mail account)

e-mail Reply to - (address of circ e-mail account)

Send to Robin.

(Also recommends getting an Acquisitions e-mail account for the future)

C-12: PCODE Values

For PCODE2 and PCODE3, be thinking about what statistics you would like to separate out (areas of study, credit/noncredit, student type, etc.)

• Other

- Robin distributed "Worksheet C10 Circulation Options" in preparation for next meeting.
- Cathy brought up idea of a cluster ptype and loan rule for those times when we want to borrow library-to-library.
- Robin will ask Mark to send out a new "Loading PATRON records from a file into a MOBIUS INNOPAC System" reflecting the decisions

• Next Meeting

Friday, March 24, 2000

9:15 a.m.

SLCC-Forest Park