<p style="text-align: center">Minutes Archway Cluster Meeting</p>

<p style="text-align: center">St. Louis Community College at Florissant Valley</p>

<p style="text-align: center">April 26, 2000</p>

<p style="text-align: center">Revised 5/11/00</p>

Attending:

Members:

Linda Bigelow, Cathye Dierberg, Loretta Ponzar, Bonnie Sanguinet, Kathy Schlump, Fran Stumpf, Paul Talaski, Stephanie Tolson, Carol Warrington.

Guests:

Jennie Dodillet (ECC), Sue Morgan (JC), Ying Li (SCCCC), Betty Warren (SCCCC), Joanne Galanis (SLCC-FV), Elizabeth Howell (SLCC-FV), Janice Pattron (SLCC- FV), Cathy Reilly (SLCC-FV), Patricia Forester (SLCC-FP), Arlene Shaner (SLCC-FP), Jan Earnest (SLCC-M), Damaris Schmitt (SLCC-M), Donna Solterman (SLCC-M)

MCO:

Robin Kespohl, Jim Dutton

Archway Meeting

The minutes of the April 18 meeting were approved.

There are additional meetings scheduled for June 16 at St. Charles and July 14 at Forest Park. However, the June 16 meeting may be in jeopardy since the III Serials training is now scheduled for that week.

The III Circulation training will remain at Jefferson College and we will be moved to a larger room.

There is a PERL script for UNIX on the EZProxy web site. Cleveland State has been using the automatic III interface for five months.

We will leave the scope locked for the time being. SLCC will scope to the entire SLCC collection. Robin suggested that we put hot links for the SLCC campus scopes on the web page. Any search done on the SLCC scope would have to be re-keyed at the campus level.

SCCCC is ready to go with their data load. Their records are ready to go on an FTP server.

JeffCo has received its data exit package and will begin the extraction tomorrow. They have gotten a promise from their systems department that they will be able to get around their campus firewall.

ECC is working with Robin on exporting their data. We should send e-mail to Christopher Gould (gouldc@umsystem.edu) when our records are ready. He can either get them off our FTP server or we can send them to the UM FTP server. He will notify Ineke at III the records are there and she will begin testing.

MCO will do a test load (at least 1,000 records) without overlaying the records. Robin and Fran will check on the mapping. We must sign off on indexing by May, before catalog training begins. MCO will append JC, ECC and SLCC records to the SCCC TestPAC without overlaying. Once all are satisfied with their record mapping the real load with overlay and field protection will begin.

Loretta and Carol Warrington went to the MOBIUS Access Advisory meeting on April 25. A new Visiting Patron proposal is being sent to the MOBIUS Executive Council and then the whole MOBIUS Council. The new proposal, which is a section of the ILL lending proposal, calls for a six month trial for each institution after they begin using the INN-Reach software with their own records. The MOBIUS Executive Committee can ask for a review of that institutions policies at any time. There will also be an annual review of the policies by the Executive Committee. There will be a final review of the policies after the last library is done with their six-month trial period. The Access Advisory committee is encouraging all MOBIUS member institutions to provide ILL statistics. They also suggest that member libraries encourage their patrons to return books to either the loaning library or the pickup location. The committee is also proposing that the default price for lost items remain at $120, but would be negotiable down from library to library. The lending library has the final say as to what they will accept as payment: replacement and a processing fee of $20 or the cost of the material and a processing fee.

MOBIUS Meeting

We welcomed and introduced reference librarians from all four Archway member institutions to this morning session.

1. Announcements
   - The new MOBIUS *Newslink* was distributed.
   - The First Annual Users Group conference will be held in Columbia on Friday, June 2. All MOBIUS member libraries staff are encouraged to attend. There is no cost for the conference itself. The cost of lodging and transportation is not covered.
   - 1,000 more MOBIUS delivery bags have been ordered.
   - Important dates:
     - June 27 Archway goes live on Circ and WebPAC.
     - July 31 patron initiated borrowing will be turned on.
     - September 27 Archway records will be in the INN-Reach catalog and MOBIUS patron initiated borrowing will begin.
   - Robin assured us that Materials Booking is very easy and Mark can supply training if needed. It is character-based software at this point. There are no problems using it between institutions.
2. Status Code wording:
   - **"-"** We decided to stay with the wording "Available"
   - **"c"** We decided to create a status code for non-reference materials that we want only our staff and students to be able to borrow. "c" will be used by SCCC.
   - **"l"** only SLCC staff and students can borrow.
   - "j" only JeffCo staff and students can borrow.
   - "e" only ECC staff and students can borrow.

     Note: Robin needs wording for the above 4 status codes from each institution.

   - "m" missing - "Sorry, missing items may not be requested"
   - "z" claims returned - "Sorry, missing items may not be requested"
   - "n" billed - "Sorry, missing items may not be requested"
   - "$" lost and paid - "Sorry, missing items may not be requested"
   - "s" on search - "Sorry, missing items may not be requested"
   - "o" library use only - "Sorry, this item is limited to library use only"
3. We can create as many statuses as we want to deal with. Cathye would like to create numeric codes for each campus of SLCC.
4. The cluster agreed to allow holds for on order and in process materials. Ellis Library creates the item record at the time of receipt to ensure their hold for their faculty takes precedence.
5. Robin demonstrated using the Create Lists function for creating bibliographies.

   Break for lunch. The reference librarians then held a separate meeting.

6. TestPAC indexing.

There was a dissatisfaction with the field group labels as we originally defined them. Cathye will come up with a list of more specific labels.
- The WebPAC default for highlighting word search terms is just highlighting them in the 500 fields, whether or not those fields are indexed. Robin changed the WWWOPTIONS file so all occurrences of the search term will be highlighted.
- Bonnie agreed to send indexing and searching assignments to ECC, JC and SCCCC for TestPAC evaluation.

7. Worksheets
   - C-15 Time to Reshelve an Item

     SLCC will use and Bonnie will input
     SCCCC will not use

   - C-16 Centralized Holds Pickups

     All institutions need to e-mail Robin their decisions on what location to send centralized holds to.

     We need to coordinate input of locations. Make sure to proof the location codes. Can change the label (M>I>C>B).

     The e-mail source on the branch addresses has to be the login

8. Logins
   - Names can be sorted, so set up the naming convention so they sort together for each institution. They can also be sorted by group name.
   - Westminster used the same generic login, WCSTAFF, and individuals had their initials and password for additional privileges.
   - Robin suggested setting up Circulation staff logins as scoped, but this needs to be discussed at each institution.
   - Always answer NO to **mail account?,** except for the login who accepts email notices.
   - If you want different statistical groups you need separate logins.

9. Initials and Passwords
   - Used for assigning authorities.
   - Can use staff initials, the software will not allow duplicate initials. Ellis library used email username.
   - You enter initials and password often, so the shorter the better.
   - The password can be changed by the user. In fact, this is recommended.
   - Be sure to refer to MCOs handout on assigning privileges before proceeding.
   - Make sure to give Circ supervisors the ability to free records in use. This will not free records actually in use.
   - Robin suggested printing out the highlighted privileges for each user and keeping a notebook to refer to. When changes are made, date and initial.
   - The **libtech** and **sys** passwords were both changed to **testpac.**

10. Data Input by Coordinators
    - Branch location codes (proof for completeness, correct any labels, change circulation address number
    - Location addresses (A>A>S>B) address line has been increased to 40 characters
    - JC and ECC need to complete addresses
    - Complete login name for login doing notice printing (before Circ training)
    - Add e-mail account for bounced notices (before Circ training)

11. Data Input by MCO
    - Locations served
    - Hold pickup locations (Archway members need to e-mail this information to Robin)

12. Data Loading
    - JC ready to begin extracting data tomorrow
    - SCCCC ready for Christopher to FTP records to Archway server

EC still needs to talk to Robin about extraction
  - SLCC ready to send records to NOTIS conversion consultant any time
13. Worksheet C-10
  - #45 - What is the meaning of "Holds: Title Level Hold even if only one copy"? We had it answered no, but are now unsure. Robin will make sure holds on order records will work properly.
  - #30 - We still need to hear from Michael on whether there is a way to automatically report on cleared bills.
  - #35 - Changed the answer to "Lesser, Bill or Fine"
  - #60 - Well leave it at 8.
14. Other
  - MilCirc and MilSer client software can be downloaded from the MOBIUS web site, but it cannot be configured to talk to the INNOPAC software until that is loaded on the Archway server. It will be installed when III is ready to do so, perhaps not until some time in June. They want to load the latest version possible before we go live.
  - We need to look at the ACQ and SER worksheets before out next Archway meeting.
15. Next meeting - Friday, May 12, 2000, 9:30 a.m., SLCC - Forest Park