MASC Meeting, July 10, 2001

Mary Jo Barbush-Weiss (UMR) chair of MASC presided

Present: Mary E Anderson (UMKC-MNL), Mary Jo Barbush-Weiss (UMR), Doris Beeson (SLU-Pius), June DeWeese (UMC- Ellis), Alice Edwards (UMC-HSL), Delores Fisher (UMC-ILL), Liz Glankler (SLU-Law), Tammy Green (UMC-Ellis/ILL), Gary Harris (MCO), Annette Howard (UMR – ILL), Barbara Hufker (UMSL), Resa Kerns (MU-Law), P.J. Koch (HSL-ILL), John Meyer (UMC-Ellis), Nancy Morgan (UMKC-Law), Peggy Mullaly-Quijas (UMKC-HSL), Christine Robben (UMKC-MNL-ILL), Larry Ruzich (UMKC-MNL), MaryAnn Samson (SLU-Law), Yelena Shmidova (UMKC-Law), David Shocklee (SLU – Pius/ILL), David Snead (UMSL), Mary Wood (UMC-Ellis).

1. III ILL module.
Charge from the UM Directors

At its May 21, 2001 meeting, the UM Library Directors agreed to ask MASC to undertake an assignment related to the evaluation of both the III module and ILLiad as potential management systems for interlibrary loan. The charge was directed to the UM Libraries and, at Saint Louis University's request, does not include the SLU Libraries at this time. The Health Sciences Library at Saint Louis University is using ILLiad, at least partially, and has newest update. The HSL at SLU is working directly with Pius Library.
Background: The MU Libraries have been using OCLC's GILLS (Group Interlibrary Loan System) as part of a pilot project within the Big Twelve Plus Libraries Consortium. OCLC had decided to move away from GILLS and has informed the MU Libraries that it must move from that system as soon as possible. The MU Libraries intend to migrate to ILLiad in the immediate future and can implement ILLiad as a pilot project, providing an opportunity for the other UM Libraries to evaluate it as a possible University-wide system, or the UM Libraries can proceed to implement ILLiad as a group.

Mary Jo Barbush-Weiss took a straw poll of those in favor of ILLiad and, those in favor of III. Responses were unanimous for ILLiad. A lengthy discussion of the pros and cons of the III ILL Module and ILLiad followed. E-Mail comments from other libraries were read and product websites explored. For example, Oregon State University has been using both III ILL module and ILLiad and recommends ILLiad over the III ILL module. P.J. Koch of SLU HSL Interlibrary Loan said ILLiad is a lot to maintain, but that he liked it. He added that he had not been using a management system before this. In his experience of ILLiad, the system requirement had been underestimated by OCLC because ILLiad was a system "hog" as far as memory. He suggested if anyone needed more information about ILLiad above and beyond the OCLC site www.illiad.oclc.org/requirements/index.stm, they could check out www.atlas-sys.com He mentioned lots of set up involved with ILLiad but once it is setup it can be customized to do just about any kind of report/statistic needed. The MU Libraries voted not to implement the III Module since it was primarily a borrowing side system, leaving the lending side to the Circulation system, and to implement ILLiad in their Interlibrary Loan Departments.

2. Requesting articles through Merlin

Kathy Maul, MOBIUS Technical Trainer, used to work at a member library of the SWITCH Consortium (http://topcat.switchinc.org/) in Wisconsin, and SWITCH was involved in setting up this functionality with Innovative in the early 1990s. She talked about her experience and answered questions from the group. One issue of concern to the group was that students could request articles even though their library owned it. Patrons could try to get their articles for free and not have to do their own copying. Kathy said they decided to charge $.15 per exposure to compensate for this. She said, even though her library was part of a smaller library consortium, it would get 20-30 article requests per day in addition to the patron-initiated book requests. Libraries could not use paging slip type notices – it had to be done manually. Copyright records had to be kept manually by the receiving library. A file was kept with journal title and amount of articles received. The group consensus was although it appears to be a popular feature it would be best to revisit it again in couple years. Mary Anderson (UMKC-MNL), suggested that their interest

in this feature had been a way to curb ever rising OCLC bill. David Shocklee (SLU- Pius), suggested they might check out flat rate to OCLC.

3. MERLIN home library location for ILL institutional p-types, follow-up

Many ILL patron records that have a ptype of "zero" are utilized by SLU, UMC, UMSL, and UMR and have a non-existent default home library of zzzzz. Gary Harris suggested that we create a unique home library location for ILL records of meill. He created a test ILL record to which the Ellis library staff agreed to check out items. If this record works properly, we will rapid update all the ptype 0 (zero) ILL record to change their home libraries to meill.(Note: UMKC-MNL checks out ILL items to a general UMKC ILL record on MERLIN and to individual libraries on CLIO. MNL does not use ptype 0.) This was not done and there will be a retest.

4. Inconsistencies in dates relating to MOBIUS holds and pickup notices

UMKC had a patron point out inconsistencies in a notice that the patron received. The message said that UMKC would hold for 7 days. The notice was dated June 26th. The pick up date was June 29th. A discussion followed that we extend the time to pickup for MOBIUS items to ten days in the MOBIUS patron loan rules to allow three days travel time and seven days on the holdshelf. It was decided to bring this issue up with MAAC.

5. Overriding of the original due date and overriding "too many renewals" for MOBIUS items

June DeWeese (UMC-Ellis), brought up the fact that several MOBIUS libraries were overriding the original due date and overriding "too many renewals". She had discovered 17 instances of overriding the "too many renewals" block. The book would be overdue in MERLIN but continually renewed in MOBIUS. It was decided that MAAC needed to issue a formal document addressing overriding due dates and renewals for MOBIUS items. Mary Jo Barbush-Weiss (UMR), our MAAC representative, will ask that both issues be placed on the agenda at the MAAC July 24th meeting.

6. Billed items for reconciliation among the MERLIN libraries.

Reconciliation for billed items among the MERLIN libraries took place – All were surprised and happy concerning the low number given the amount of borrowing. In August, 2001 there will be a reconciliation among the MERLIN libraries for books billed before June, 1999. All agreed that if they were given a copy of the "billed" notice that went to their student they would call, block etc.

7. News from MAAC
Request balancing table is more balanced.
Maximum requests may be set by each library for their own p-types
Proper procedure for filling out bookbands

Mary Jo Barbush-Weiss reported on news from MAAC. Regarding p-types: In the INNReach system, a maximum number of allowable central catalog requests is set for each patron type. This figure represents the maximum number of items a patron can request or check out through the MOBIUS central catalog at any one time. The limit is currently set to 10 for undergraduates and 20 for graduate students, faculty, and staff. Some libraries have expressed a desire to increase the number, especially for undergraduates. Other libraries have indicated they do not want to increase the number of items they allow their students to request. Each library can determine whether to map each of their local patron types to the 10 or 20 maximum, for example, if June prefers 20 maximum requests for graduates students and undergraduates and Doris wants to keep 20 for graduates and 10 for undergraduates the system will allow.

Mary Jo also mentioned that MAAC has changed the request balancing table – Members agreed to even out the table and would revisit the table in three months when other clusters are up and running

Finally, Mary Jo reviewed the proper procedure for filling out bookbands. Everyone needs to be more careful to use the proper Lanter label. Often the wrong labels are used when there is more than one campus for a single institution. Everyone needs to be cautious of abbreviations.

Minutes from the April 10 meeting were approved with one correction by the chairperson.

The next meeting will be on October 9, 2001.

Meeting adjourned about 2:00 p.m.

Respectfully submitted, Doris Beeson, Recorder.