MERLIN Access Services Committee
July 15, 2003

In Attendance:
Mary Anderson (UMKC); June DeWeese,(chair UMC); Larry Ruzich (UMKC)(recorder);Virginia Schnabel(UMR);James T. Morisaki(UMR);Barbara Hufker(UMSL);Christopher Gould(LSO/MCO);Gary Harris(LSO/MCO);Terri Knouff(UMC);John Meyer(UMC);Caryn Scoville(UMC);Tammy Green(UMC);Mary Ann Samson(SLU-LAW);Mary Zettwoch(UMSL)

1. New members were introduced.

2. Larry Ruzich was chosen as recorder

3. LSO/MCO Report – Gary Harris
   a. Northwest Missouri State will remain part of Towers Cluster
   b. Working on new format for cluster map

4. Mobius net loss book reconciliation
   Mary Anderson and Barb Hufker submitted a draft of the reconciliation. Process was discussed, please see attached final draft. June Deweese will take to MAAC meeting.

5. Canceling holds. Committee agreed to put items in missing status when paged items are truly not on shelf. This will allow the patron to place a hold on another copy in Merlin without staff assistance. If items are too brittle or not appropriate to lend cancellation notice should state reason for not lending.

6. INN Reach "Pick Up Anywhere"
   Current functionality of PUA does not work in MOBIUS cluster environment. Next release from III should allow this to work in our environment. MU Columbia, CMSU, William Woods & WashU have agreed to Beta test "pick up anywhere". Gary intends to begin the planning stage of the testing period after MAAC meets on 7/22.

7. Written Circ. Policy for Merlin Cluster.
   Mary Ann Samson and June Deweese will draft a policy based on our current unwritten agreements and will submit to this committee at a later date.

8. Student enrolled simultaneously enrolled at multiple campuses.
   Dually enrolled students are experiencing problems with access to electronic databases from off campus. Currently students are authenticated through EZProxy checking Merlin record or single sign-on on most campuses. UMKC and MU Columbia have manual work arounds for students with dual enrollment. Christopher Gould and Gary Harris intend to implement a solution once all student records are loaded through PeopleSoft which is not scheduled to happen

until 2005. The solution would allow patrons to load with a dual campus listed in the PCode1 field. Christopher stated that the PeopleSoft implementation schedule for student records is as follows: UMR-Dec.03, UMKC or UMSL May 04, UMKC or UMSL Dec. 04, and UMC 2005.

9. Bag and Tub Inventory
    MASC will schedule our tub inventory to coincide with the MOBIUS Lanter bag inventory on Tuesday, August 12th. MCO will send the bag inventory reporting instructions to each consortium list. June DeWeese will send tub inventory reporting instructions to the MASC list.

10. Mary Jo was not available to report on the MAAC Issues.

11. Next Meeting is scheduled for Tuesday, October 14, 2003

Proposal:

Mobius Net Loss Book Reconciliation

I.   Lists
   A. Each month, owning libraries will submit a list of delinquent borrowers to the borrower's home library. ***Example: Library A will send a list to Library B of the names of Library B's patrons who have billed books that belong to Library A.
   B. Institutionally Overdue and/ or Billed Items.
       1. In August each MOBIUS library will print a list which contains items that have been billed for 6 months. The lists will be copied and distributed to be searched by each Mobius library.
   C. Returned Too Long.
       1. In August each MOBIUS library will print a list from the RETURNED TOO LONG report. These lists will be distributed

and searched by each Mobius library. Books that have been on the report for over six (6) months will go into the reconciliation process.

D. Upon completion of the searching (one month period) a new list is put into an EXCEL file for each library to review for accuracy.

II. <u>**Reconciliation**</u>

A. The finalized list will have the number of books each library owes to other MOBIUS libraries. Then a value is assigned to each library's account.
**Example: UMR patrons are billed for 5 books from other MOBIUS libraries. Other MOBIUS patrons have 6 billed UMR books. Therefore, UMR has a positive credit of one book. And they will receive a reimbursement from the "MOBIUS payment system" of $120.00.

B. By January 15th, all processes involving reconciliation will be complete and the net payout amounts can be distributed to the Deans/Directors for action.

**NOTE:
Specific books must be identified for the pay-out process. This ensures that both paying and receiving libraries will have records of what the monies are attached to. This will also prevent double payment should the book remain on any of the lists mentioned above during the next cycle.

**NOTE:
The MOBIUS Consortium Office will complete the Reconciliation process found under section II "Reconciliation".