# **Addendum to the EBSCO ReShare DCB Services Agreement**

An Addendum to the existing EBSCO ReShare DCB Services Agreement dated October 4, 2022 (herein the “Agreement”) entered into this on the latest execution date set forth on the signature block below by and between EBSCO Publishing, Inc., (“EBSCO”) an Alabama Corporation (EBSCO) and MOBIUS, a Missouri non-profit corporation (“Library”).

**The following shall be added as Exhibit G to the Agreement:**

The below represents the ReShare go-live features agreed upon between MOBIUS and EBSCO and K-Int and supersedes any feature list outlined in the existing EBSCO ReShare Services Agreement.

**Requesting and circulation workflows**

1. Patron uses EBSCO’s LOCATE OPAC to search and make requests from ReShare
   1. Primary use case supports a patron-initiated request UX without mediation by library staff.
   2. Secondary use case allows library staff to act as proxy requester on behalf of patron.
2. Patron authentication
   1. If not already authenticated, placing a ReShare request requires the patron to authenticate via the preferred method used by the patron’s library.
   2. Authentication requires the patron to supply credentials to authenticate their library account and check eligibility against their library system.
   3. The patron’s ILS determines patron’s eligibility to request. If not found or eligible, ReShare will display corresponding message blocking the patron request.
   4. If eligible, the patron selects a pickup location from the patron’s library and members participating in the pickup select program.
   5. Patron submits request and the item selection process begins.
3. Item selection process
   1. Identify all items available for loan and on-shelf.
   2. Of those on-shelf, prioritize placing a request on a copy that is closest to the pickup location.
   3. When all items are either on loan or holds, place request on the one likely to be returned soonest (combination of number of holds and due date).
   4. If the instance record has volumes, allow the patron to select a volume and allow ReShare to select the items using the same item selection process as for monographs.
   5. Optional feature to allow staff to place a hold on behalf of a patron and to bypass the standard item selection process in favor of requesting a specific copy.
4. Request sent to the lending library in near real-time (NRT)
   1. Request processing
      1. Request associated with an institutional patron or equivalent.
      2. Request is added to the pull/pick/paging list.
      3. If library is unable to locate material, library uses ILS to cancel the request, ReShare searches for another item (using same item selection algorithm for original request).
      4. If library locates material, prepares it for fulfillment/transit and using checkout, circulates the item to the borrowing library.
      5. Print transit slip
         1. The slip will include borrowing library name and code (for label making).
         2. Library staff prepares the item for delivery [Not an ILS step].
      6. Lending library system automatically updates catalog.
      7. In NRT, ReShare updates transaction status at the borrowing library.
   2. Both library and patron can track the status of their ReShare transactions within their ILS and patron empowerment features.
5. Courier picks up materials and delivers them to correct borrowing libraries [Not an ILS step].
6. Borrowing library scans and receives the delivered materials using ILS check in capability.
   1. If items is scanned at the wrong library destination, system to alert operator to route to intended destination and puts item in-transit to destination location.
   2. Hold triggered; ILS directs user to put item on the physical hold shelf.
   3. ILS updates ReShare item record.
   4. Patron is notified via their ILS via available notification methods of the library system notification capabilities (e.g. email, text, sms).
7. Patron arrives at the pickup location to checkout ReShare item(s)
   1. Circulation of ReShare item(s) via ILS circulation rules.
   2. ILS updates ReShare transaction record.
8. Patron returns ReShare items.
   1. If a patron returns ReShare item(s) to their library, the ILS updates the item(s) to a returned state.
      1. In NRT, ReShare updates the lending library that the item is in-transit.
      2. An in-transit slip is produced (dependent upon the capabilities of the ILS).
      3. ReShare Item shipped to home library [Not an ILS step].
   2. Patron responsibility of ReShare item(s) complete.
9. Material arrives at home library.
   1. Item is scanned using ILS check-in and updates the local catalog circulation status.

**Cataloging**

1. Automatic contribution of records to the ReShare union catalog within 24 hours as records are cataloged/added, updated or deleted on the local system. This feature will have the ability to attenuate the frequency on a per system basis to accommodate busier libraries.
2. Contribution of records applies on a per library basis and addressable by encoding on a record-by-record basis.

**Patron search**

1. The ability to allow all libraries to enable or, in the case of Sierra and Polaris, create a capability to execute a pass-through search from the local patron search application to the ReShare union catalog.
2. The ability to facet by library (not shelving location) in the LOCATE union catalog and apply to search results.
3. The ability to visually associate an 856 field with the corresponding holding library in LOCATE on the ReShare union catalog.
4. On the full record display, the ability to view libraries with holdings that are currently eligible for loan and are on-shelf at the library.
5. On the full record display, the ability to place a request.

**Administration**

1. As much as possible, provide MCO the means to administer and configure ReShare tables, settings and parameters.
2. A way to easily identify last copies for the consortium within the union catalog.
3. Ability to calibrate via configuration the match algorithm (multiple, definable, hierarchical, match points) to identify instance matches.
4. Ability to calibrate via configuration the algorithm for determining the best instance record used for “match and attach” instances within the union catalog.
5. Options on how the system chooses an item to fill a hold and when to prompt for more information from the user (i.e. volume and serial records).
6. The ability to visually associate an 856 field with the corresponding holding library in LOCATE on the ReShare union catalog.
7. LOCATE must be responsive down to a hand-held device.
8. The ability to generate a set of circulation exception reports.
9. The ability for all MOBIUS members to access ReShare circulation lending and borrowing statistical reports.
10. The ability to access ReShare circulation transaction logs and download in one or more common output formats (e.g., csv).

**NOTES**

* Wherever near real time (NRT) is mentioned, it equates to a range from one second to five minutes. This range is largely dependent upon finding the right frequency of updates allowed by the ILS network traffic controller.
* Where mentioned, ILS = FOLIO, Polaris, Sierra library service platforms. Unless a specific library system is mentioned,
* Unless specified to the contrary, all capabilities are required for the MOBIUS’ go-live offering. As part of an iterative development process, new capabilities may be identified and folded into go-live plan or post-go-live. This is expected that all parties will, in good faith, seek to balance existing project priorities and new capabilities.
* All workflows are intended to illustrate the user journey and are subject to change by K-Int and EBSCO.
* Unless others specified, circulation workflow and corresponding functionality heavily leverages the library ILS. That said, there may be cases where the only means for creating a capability is to request development from an ILS vendor. On-site borrowing is one such capability that we already know about. In all cases, it is incumbent upon all parties to consult on the issue and define and take steps to address. Work as a team, succeed as a team.
* The refinement of match algorithms can be a significant investment. Collectively, we are collectively committed to moving at a speed relative to the impact and take measured steps to affect the best outcome for all. Generally speaking, rushing changes in this area of the system are likely to result in significant cost to the project.

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| EBSCO PUBLISHING, INC.  By:  Title: | MOBIUS  By:  Title: |