

# Mockingbird membership application form 2023

All Arkansas academic, public, and special libraries are invited to request membership in the Mockingbird program. Libraries new to Interlibrary Loan (ILL) services are encouraged to apply. The application window will be open June 5th through June 23rd, 2023.

If you have any questions about this form, email Jessica Kirk at [aslib.mockingbird@ade.arkansas.gov](mailto:aslib.mockingbird@ade.arkansas.gov) or call 501-682-2867.

## Library information

- 1 Library Name
- 2 OCLC library code, if you have one.
- 3 Street address
- 4 City
- 5 Zip code

## Interlibrary loan contact information

We are asking for contact information for the person that will be placing and receiving loan requests. This is the person that will understand most about your library's specific ILL workflows and logistics.

- 6 Full name
- 7 Title
- 8 Email address
- 9 Phone number

## Director contact information

This person will sign the final agreement on whether to accept membership into Mockingbird, but you will need to have your ILL staff aware of what is required.

- 10 Full name
- 11 Title
- 12 Email address
- 13 Phone number

## Systems / Technical contact information

We are asking for the contact information of the person we would talk to about technical issues directly related to the ILS and who would have the ability to open up tickets with your ILS vendor. Feel free to note in the name field if this information is the same as the director or ILL contact information above and skip the other fields.

- 14 Full name
- 15 Title
- 16 Email address
- 17 Phone number

## ILL Workflow questions

18 Who is your ILS provider?

Aleph (Ex Libris/ProQuest)	InfoCentre (Follett)	Sierra (III/ProQuest)
Alexandria	Insignia Software	Surpass Cloud (Surpass Software)
Alma (Ex Libris/ProQuest)	Koha (Open source)	Symphony (SirsiDynix)
Apollo (Biblionix)	LibrarySoft (New Generations)	Unicorn (SirsiDynix)
Atrium (Book Systems)	Library World	TLC
Destiny (Follett)	Mandarin Library	VERSO (Auto-Graphics)
EOS (SirsiDynix)	Automation	Voyager (Ex Libris/ProQuest)
Evolve (Infovision)	Millennium (III/ProQuest)	WMS (OCLC)
Evergreen (Open source)	OPALS	Workflows (SirsiDynix)
Horizon (SirsiDynix)	Polaris (III/ProQuest)	
Iguana (Infor Libraries)	ResourceMate	

19 Is your library a single location or a part of a system with multiple locations?

- Stand-alone, single locations
- Multiple locations
- Other

20 If your library has multiple locations, how will ILL be coordinated?

- All ILL materials are processed at one centralized location.
- Each location handles their own ILL directly.
- Does not apply to us.
- Other

21 Does your library currently use any patron authentication methods to allow patrons to access outside resources?

For example, Overdrive and Hoopla use a protocol called SIP2 to make sure a patron is in good standing in your ILS before they can access that service.

If you're unsure, you can contact your ILS representative.

- SIP2
- NCIP
- Other

22 Do you ever want your patrons to be able to place ILL requests on their own? If you allow this, you can always have their requests require system approval and you don't have to open this access to them right away.

- Yes
- No

23 While staff are logged into Mockingbird to place requests for your patrons, do you want them to have the ability to search for and pre-fill the material request form with the patron's information retrieved and authenticated from your ILS? This option will let the staff know if there are any blocks on the patron's account.

If you don't want this option, staff will either manually enter patron name and contact information for each request OR they will manually create user records for each new patron before making a request in the system.

- Yes
- No

24 Do you use any of these other resource sharing platforms that you will continue to use alongside Mockingbird?

- Tipasa
- Illiad
- WorldShare
- None of the above

25 How can your catalog's bib records and holdings information be accessed? Most libraries have the Z39.50 connection.

If you're unsure, you can contact your ILS representative.

- Z39.50 Connection to Local Catalog
- Manual Export of MARC records
- OCLC WMS API

## Z39.50 DATABASE CONFIGURATION

Z39.50 is a standard protocol, supported by many integrated library systems, which allows search and retrieval of bibliographic data by third- party software.

All the following questions may not apply to your library. It is often the case that people need help filling this section of the application out.

If you are unsure about any of the questions, please reach out to your Systems Librarian or your ILS vendor and get assistance from them.

26 You've already provided us with your ILS. What version of your ILS are you running?

27 Is the Z39.50 server hosted by the ILS vendor?

28 Please provide either the URL of your public catalog or the IP address of your Z39.50 server.

29 Please provide your Z39.50 Port Number.

30 Please provide your Z39.50 Database Name.

31 Does your Z39.50 server require logging in for access?

- Yes
- No

32 What type of MARC cataloging records do you use?

- USMARC
- OPAC

33 Which MARC field and subfields contain your local holdings information in your Z39.50 connection?

Commonly used MARC fields are 852 or a 9xx field. Please include as much information as you know.

For a record with the following information in the 852 record field

852a; Fletcher Fictionc; FIC LEE t; DUE 09-27-22 BILLED

852a; Fletcher Fictionc; FIC LEE t; CHECK SHELF

Your answer would be 852.

34 List all MARC subfields for the following:

Location Name (required)  
Call Number (recommended)  
Copy (optional)  
Volume (optional)  
Status (recommended)

For a record with the following information in the 852 record fields

852a; Fletcher Fictionc; FIC LEE t; DUE 09-27-22 BILLED  
852a; Fletcher Fictionc; FIC LEE t; CHECK SHELF

Your answer would be:

Location Name: a  
Call Number: c  
Copy:  
Volume:  
Status: t

35 If your system has multiple libraries handling ILL at each individual location OR your library has collections you want to exclude from being loanable, we can map out your locations to prevent requests on those items.

Which applies to you?

- Single Institution (one library, all items owned considered loanable)
- Mapped Locations (multiple libraries handling ILL or some collections not loanable)

## Mapped locations

Please provide a table of all location names from your local ILS in the MARC field location name subfields and how you would like that location name to be displayed in Mockingbird. It is best to provide ALL locations. This mapping can be updated as needed.

36 Please email your mapped locations to [aslib.mockingbird@ade.arkansas.gov](mailto:aslib.mockingbird@ade.arkansas.gov) with the subject heading: "Library name, mapped locations."

The information should be in the table format shown below and preferably in an excel type sheet file.

"Location name" is what is already in your location subfield (Likely the 852 subfield). In the "Display name in Mockingbird", you provide what you want displayed in the Mockingbird shared catalog. Usually just the library's name is provided.

<b>Location name</b>	<b>Display name in Mockingbird</b>	<b>Is this location / collection loanable?</b>
Fletcher Fiction	CALS Fletcher Library	Yes
Bookmobile	CALS Bookmobile	No
Main NonFiction: 5th Floor	CALS Main Library	Yes
Terry NonFiction	CALS Terry Library	Yes

## Status Information Availability

If your ZTarget passes Status information, the system can use that information to check if an item is available before an ILL request is sent to you.

If the item is not currently available, such as checked out, then you will be skipped as a lender and the ILL request will be sent to the next available lender.

If your ZTarget does not pass Status information, the system will assume all items are currently in an available status and send you the ILL request to process. If the item is not available, you'll manually mark the request to send it to the next lender.

37 Is availability information provided by your Z39.50 connection?

- Yes
- No

## Status Mapping

Please provide a document that lists all availability status options from your local ILS found in the MARC Field status subfields and how you would like that status to be displayed in Mockingbird. Also note if each status is considered available for ILL.

38 Please email your status mapping to [aslib.mockingbird@ade.arkansas.gov](mailto:aslib.mockingbird@ade.arkansas.gov) with the subject heading: "Library name, status mapping."

The information should be in the table format shown below and preferably in an excel type sheet file.

The "Status Code in ILS" is what you see in your MARC records; "Display Label in Mockingbird" only has two options - available or not available.

<b>Status Code in ILS</b>	<b>Display Label in Mockingbird</b>	<b>Available for ILL?</b>
In	Available	Yes
Checked Out	Not Available	No
In Process	Not Available	No
Billed	Not Available	No

## Mockingbird Membership Agreement

The Arkansas State Library encourages resource sharing through the provision and ongoing financial support of the Mockingbird platform. Participating in the Mockingbird resource sharing platform provides enormous benefit to participating libraries. The success of Mockingbird is dependent upon each participating library maintaining the provisions of the agreement terms below in good faith.

39 Libraries wishing to participate in the statewide resource sharing platform agree to:

1. Be informed about and abide by best practices.
2. Communicate with the Mockingbird coordinator and their library's ILS vendor consistently and effectively.
3. Maintain current contact information in the Participant Record and subscribe at least one staff member to the Mockingbird mailing list.
4. Develop local ILL policies and workflows for Mockingbird ILL service.
5. Make their local collection visible in the shared catalog.
6. Make materials in their circulating collection available for interlibrary loan service to other members.
7. Maintain resources to ship and return items.
8. Participate in continuing education related to interlibrary loan and Mockingbird.

My library can agree to this if selected for membership.

40 Is there any other information you think is important for us or the vendor to have about your library and how it operates regarding resource sharing?