

MERLIN ACQUISITIONS AND SERIALS COMMITTEE

Minutes of the meeting held on April 28, 1999

PRESENT: B. Merrell (UMR), M. Watkins (UMR), A. Stewart (UMR), J. Edinger (UMSL), R. Cleary (UMKC), P. Bickers (UMKC), B. Stuart (UMC), S. Parkinson (UMC), S. Bent (UMC), H. Kevil (UMC), A. Allen (UMC), R. Rexroat (UMC-HSL), J. Parker (SLU Pius), P. McCarthy (SLU Pius), R. Amelung (SLU-Law), C. Gould (LSO), J. Jackson (LSO), B. Heidlage (LSO)

J. Parker called the meeting to order.

The minutes of the July 1998 meeting were approved.

Staffing and personnel changes were announced:

UMC--Ellis is undergoing a staffing reorganization. There will be a new position posted for Head of Serial and Monographic Acquisitions. H.

Kevil's position is now Head of Collection Development.

SLU Pius has a new Serials Unit Supervisor, Judi Guzzy; Jennifer Young is Serials and non-book cataloger.

UMR announced that Bob Heyer-Gray is leaving to take a job at UC-Davis.

Other announcements included:

UMC--Ellis. H. Kevil, as part of the Ellis Committee on E-Resources, is developing a list of e-journals to which Ellis has access. He will be putting the list up on the web. This list will provide everyone with a collection development opportunity. He is proposing that, eventually, the list could be expanded to include other campuses.

UMC--HSL. R. Rexroat has a spreadsheet program which incorporates a tickler system. He will arrange for a demonstration at the next MASC meeting.

LSO UPDATE

G. Rickerson provided an update to the MOBIUS project. He welcomed everyone to the new facilities which house both LSO and the MOBIUS staff. MOBIUS implementation is proceeding apace. He stated that 51 (including the 6 MIRACL) libraries will eventually make up the MOBIUS system. The 45 which yet need to be brought into the database will be grouped into generally geographic clusters containing from 3 to 9 institutions.

He introduced R. Kespohl, Implementation Coordinator and M. Wahrenbrock, Training Coordinator. The MOBIUS organization is composed of the Executive Committee and the MOBIUS Council. The latter is made up of all the directors of the MOBIUS libraries. The order and timeline for implementation will be decided on next Monday. There will be 9 new INNOPACs brought online between now and July 2002. The full MOBIUS implementation will include the up-grade of MERLIN and WU to the III Millennium product. These upgrades will occur after Jan. 1, 2000. Funding for YR 2 of MOBIUS has been approved. He expects to hire more staff in the coming year.

After the MERLIN machine is upgraded to Millennium, we will be able to begin discussing when MilCIRC and MilSERIALS can be implemented. Of

pacticular note to this committee, after a checkin card has been used in Millennium, it is no longer available for modification in the character interface. G. Rickerson stated that there will be demonstrations of the Millennium interface before implementation. At some point ... well in the future ... it is conceivable that the character interface will no longer be supported by III.

J. Parker initiated a discussion of the "n" notes in checkin records. No one present expressed any problems with the "n" notes appearing in the active checkin records. III says that "n" notes will not display in inactive checkins in the webpac. J. Jackson reviewed the response from III. J. Parker stated that SLU Pius has many inactive checkins that need notes but don't want them in the Indentity field. P. McCarthy suggested that, in the future, before any decision is made that involves the work of this Committee, perhaps an Ad Hoc Committee could iron out differences and weigh the desired goals against the amount of work necessary to achieve them.

ACTION ITEM: J. Parker will send the Coordinators Committee chair a note requesting greater sensitivity to other Committees' work when arriving at decisions.

R. Cleary brought forward a problem with electronic invoicing. It appears that the III system will only accept a 7 digit invoice number. Since their invoice numbers have 8 digits, the first one (which is always the same) is lopped off. Due to concerns over the audit trail, UMKC was wondering if this field could be increased to handle 8 digits. It was felt that III would be unwilling to make such a change in the character interface, but perhaps would be will to address the problem in Millennium.

ACTION ITEM: LSO will find out from III how Millennium Acquisitions handles invoice numbers longer than 7 digits.

ACTION ITEM: LSO will find out from III if in Millennium we will still be operating under the same system limits for codes (e.g., 32 values in the SCodes) as we do now.

"New from Old" Command.

J. Parker demonstrated how the New from Old command worked on order records. This procedure is very useful if one is ordering a second copy or reinstating a cancelled order. It appeared that only the least useful fields are being carried over. The Committee decided that the following fields should carry over: Eprice, Fund, Location, Pay type, Vendor, Selector, Identity, Vendor note. Those fields that should NOT carry over are the following: Claim, RDate, ODate, Vendor address, Internal note, Note.

Since some members were not present, J. Parker will post the decision to the list for a vote. If the vote carries, Parker will ask LSOHELP to send this change to III.

Standards for codes for Orders and Checkins.

It was felt that the Committee's decision to essentially validate but leave undefined the Codes and SCodes should be documented in a Standard.

ACTION ITEM: R. Amelung agreed to draft a guideline for use of Codes and SCodes.

Standards for on-the-fly records.

J. Parker asked that everyone review the Standard for on-the-fly records since some have noticed a diverse application of this data. The Committee discussed the practice of overlaying on-the-fly records when pertinent information (e.g., title) varies. It was decided that one should not overlay in such cases, but rather input a potentially duplicate record and notify the first library of the possibility of a title change in the material since they ordered it. Most members preferred to be notified rather than have their initial input data overlaid.

ACTION ITEM: J. Parker and P. Bickers will draft a standard for on-the-fly bib. records to be posted to the list before the next meeting.

R. Rexroat observed that there are frequently problems along these lines with serial title changes. He asked to be notified in such situations. R. Amelung stated that MQCC was developing a contact list for precisely this situation. The list, once finalized, will be on the web similar to the list there now for notification of the need to add or delete checkin records.

IUG meeting summary.

- 1) As stated above, once one checks in an issue in Millennium, the checkin can no longer be used in the character interface.
- 2) If you do not have the LIB HAS in MARC and you wish to make an addition to it, the new data will be in the MARC format separated from the previous data by a comma.
- 3) The size of the hardware for running the Millennium JAVA-based interface is a matter of concern. Although there are no firm figures out for Serials, the recommendations for optimal performance for MilCIRC are a Pentium II workstation, running at 350-400 MHz with 128 Megb of RAM.
- 4) One feature that was pointed out in MilSERIALS is that in claiming the system will find and insert the order number in the claim form. (A question was raised of whether/how this will work in our shared environment with multiple accounting units.)

In conclusion, a general plea was made that everyone attempt to empty any list that is not essential or being actively used. There are often times when no list, let alone an appropriately sized list, is available. With the close of the FY soon upon us, these lists will be in heavy demand.

The Committee agreed to set the following future meeting dates: July 28 and October 27.

There being no further business, the meeting adjourned.

Respectfully submitted,

RCAmelung