

The following are the minutes from the Circulation/Reserves Meeting which took place in Columbia January 10, 1997.

Also, before the minutes, I have included more detailed reserves standards, for your review. Although we discussed these standards in general terms, I wanted to present them in this format for approval, so that they can be forwarded to the appropriate committees, etc., on each campus. Please let me know if there is any discrepancy with any of the proposed standards. Thanks much.

Colleen Waltman

The following is a list of standards incorporated by UMKC for inputting reserves. These are in addition to the standards proposed for reserves by Dean Schmidt, 8/6/96. Per the discussion at the Circulation/Reserves meeting 1/10/97 all campuses agreed that reserves should be standardized, with the decision as to where, in each entry, each campus opts to place the campus code being left to individual campuses to decide.

1. For professors and teaching assistants - Enter "last name, full first name", using normal capitalization. In cases where more than 1 person with the same name is in the reserve list, a middle initial (for example, more than one campus may have a "Joe Smith" teaching at a given time) should be input to differentiate the two names.
2. Enter course numbers as given in the campus class schedule, and/or course catalog, using upper and lower case.
3. Place the campus code letters (UMC, UMSL, UMKC, etc.) in all course NUMBER and course NAME entries.

For example: UMKC Economics 413  
Economics 413 MU Ellis  
Image of the Human Body UMSL

4. Do NOT use abbreviations for course names, such as Bio. for Biology, or Eng. for English, etc. Spell out the entire word, because Eng. could be English or Engineering and Bio. could be Biology, Biochemistry, etc.
5. Enter course names as they appear in the campus class schedule and/or course catalog.
6. In cases where materials are on reserve for more than one course, include, as separate entries, each course number in the course reserve entry, so that each course will display in the OPAC for patrons searching by the course number.

The UM-SLU MERLIN Circulation/Reserves Committee met on Friday, January

10, 1997 at the Library Systems Office in Columbia. Present: June DeWeese, MU Ellis; Sara VanLooy, MU Journalism; Carol Green, MU Ellis; Doris Beeson, SLU Pius; Colleen Waltman, UMKC MNL; John Huang, SLU-Pius; John Meyer, MU Ellis; Needra Jackson, MU-Law; Mary Ann Samson, SLU LAW; Trenton Boyd, MU Vet; Richard Amelung, SLU Law; Gary Harris, LSO; Janet Jackson, LSO; Barbara Hufker, UMSL; and Amy Arnott, UMSL. George Rickerson attended the first part of the meeting as well.

## I. LSO Update

A. George discussed the software updates which will address several problems.

(1). Scoping-- If one is scoped to a small portion of the collection, such as a small branch, searching does not work. (UM Archives, for example). Search will return a "no hit" result but not the typical III response. The fix attempted yesterday did not work. MERLIN will be down on Sunday as they try again. The fix they are installing will speed up scope searching.

(2). Barcode validation--Pattern recognition is a factor in both patron and item barcodes. Check digit validation is a factor only in item barcodes. Even if one does not type a "n" or a "b", the system recognizes the pattern of numbers or letters and processes the command. However, SLU does not have a /0008 in the patron barcode, so III must recognize two patterns for patron barcodes, both the UM and SLU patterns.

Everyone is in agreement that check digit validation is something that we all want. Item barcode check is important for all areas. It is not a login specific thing. It is either on for everyone or off for everyone. George emphasized that all past information on the topic of check digit validation is "off".

B. Database clean-up is progressing but is not finished. They are still transferring from LUMIN serials records.

C. The Bursar Interface is almost ready. LSO will test it in the next couple of weeks for MU.

D. The Listserv is not ready yet. George does not know why there has been a delay but suspects it has something to do with Campus Computing moving people from one e-mail system to another. In any case, once the listserv is set up, George will begin subscribing everyone. We were encouraged to be patient.

E. Each campus was asked to send Linda Jenkins their schedules for the "Library Information" part of MERLIN--the public displays for patrons to see.

F. Question was asked about the slowness of the system response, especially regarding creating lists. George said that he would check but encouraged everyone to create lists AND edit calendars early in the mornings or after 5 p.m. when there is less usage of the system.

G. Janet needs to know the statistics groups that should be included in financial reports in order that we can have fines reports for individual libraries or campuses. At this time LSO is doing regular printings of this information weekly.

## II. Election of a chair

Colleen Waltman was elected Chair of the group. The voice votes were: UMC "yes," UMKC "yes," UMSL "yes," and SLU "yes."

III. It was decided that no one should add new login groups unless it is absolutely necessary.

## IV. Incorrect return addresses on notices

This issue still needs to be resolved. UMKC is especially concerned because many of their notices still have the UMC return address. Gary said that the return address issue is still being discussed by III. The first response from III referred only to holds so it must still be pursued. According to III (per LSO) the pick-up location drives the hold notice and if there is none, the system selects the first address in the file.

\*Please send all examples, including the notice just before and just after the incorrect notice, to Gary Harris at LSO in order that he may investigate further.\*

## V. Hold Notices

\*Please send all examples of Hold problems to Betty Berryman at LSO\*

Why books appear on the hold shelf and a notice is generated but there is no "!" in the item record has not been resolved.

VI. The code to separate lost from paid items is still not done but Janet will work on it.

## VII. Enhancement requests

(1).The group was in concensus that a request for account histories for all patrons would be sent as an enhancement request.

(2).There was discussion about multiple reserve lists for multiple professors.

Some campuses were unable to get more than two courses with the same lists of materials for the same professors to show to the public (with a "search by professor"), but others are able to do so. Once the listserv is up, that issue can be discussed further.

(3). Consensus that we want to be able to waive fines by line # without having to collect \$0.00. We also want to be able to waive a portion of a fine up front without having to collect part and leave part to be paid later.

## VIII. Slow or hung records

UMC has had several hung records, or slow responses in several Circulation functions over the past week. LSO and III are working on the issue.

## IX. Time to Reshelve

Consensus of the group--a decision is not needed at this time on this topic.

## X. Reserve Standards

Consensus that each campus can set its own standards; however, a campus designation should be on each record and the course record should be as complete as possible--including the name and number of the course and the professor's name/s. The location of the campus designation will be decided on a campus-by-campus basis. The consensus was that consistency is not necessary. Attached is a document describing the standards that all campuses agree on.. Because agreed upon standards need to be forwarded to other groups, PLEASE review the document and forward any discrepancies you find.

## XI. SCAT tables

LSO bought 18 SCAT tables. Each campus has LC, Dewey, SU DOCTs, NLM. Gary said that they still need two more in order for the number of tables to be divided equally among all the campuses. We will discuss further later.

## XII. Duplicate Patron Records

Much discussion on this topic. In order to eliminate duplicate patron records, there must be a match on the U ID field which is the social security number. The letter "S" has been appended to SLU's U. ID field. However, duplicate records were presented to LSO where the U. ID field had matched, yet the system allowed the record to be added. LSO was going to check further.

Consensus is that we want to protect the variable length fields, such as message fields, from being overlaid with each patron load. Tom Jacobson said in an e-mail note to Gary Harris "Yes, it is possible to protect variable length fields, but each load will add another address." That did not seem to everyone to be a very useful solution. LSO will be continuing communication with III to resolve this problem.

SLU announced that they use the prefix 774 for their fake ID Numbers. We asked Gary Harris to distribute the complete list that he has collected from all the campuses. He said he did not have a complete list yet, but asked that everyone who had not yet sent one to please send one to him.

### XIII. Schedule of Notice Printing

Much discussion. III is still working on the issue of simultaneous printing of notices by more than one location. It is still not resolved. SLU has asked for consideration in order that they not have to print after 5 p.m. The issue was not resolved but everyone will notify the next person in line if they finish early on a given day in order that everyone else may start sooner.

### XIV. Loan Rules

There was discussion of how to add loan rules in a way that does not disrupt everyone else's numbers.

The process to be followed is: Select the number of the place holder to be used, then add the information field by field. DO NOT "ADD AN ENTRY" AND DO NOT DELETE A LOAN RULE. Those are the two actions that put everyone's loan rules out of order by at least one place. The group agreed that as few people as is necessary on each campus be directly involved with making changes, etc., to loan rules, in order to limit the possibility for error.

### XV. In-Transit

It was consensus that everyone everywhere will set everything that belongs to another library to "intransit" when discharging.

### XVI. E-Mail

Someone from each campus needs to look at the email file to see if anything in there belongs to that campus--these would be returned email notices or email notices that did not go properly.

At this time, it is not possible to protect the e-mail address field from patron load updates. It does seem to those present that this is a variable length field and that it could be protected the same as other variable length fields. Gary or Janet will look into that issue further.

### XVIII. Patron Initiated functions

The following issues need to be addressed: Validation of patrons, who collects fines and replacement fees (the home library of the patron or the lending library?), the level of involvement of the home library and recalls. This topic will be discussed at future meetings.

Consensus issues: Blocks must be honored by everyone. We will live with each other's loan rules.

### XIX. Notice Texts

Each library will have a maximum of five placeholders. The rest will be free for everyone to use. The maximum number of notice texts is 255 for everyone combined.

### XX. PC Backup

SLU uses PC Backup. None of the UM campuses use it.

The last reminder of the day, please let the next person in line know if you finish printing notices early.

XXI. Next meeting

We will gather again on April 9 from 10-3 at LSO in Columbia.

June DeWeese, recorder for the day

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Here is the list of issues LSO is continuing to look into:

- 1.Incorrect return addresses on UMKC (and others?) hold notices
- 2.Hold shelf problems, particularly cases where items should be on the hold shelf and are not and vice versa.
- 3.Developing a code for lost separate from lost and paid.
- 4.Continuing problems with duplicate patron records.
- 5.Protection of fields in patron records that does not result in that field being added numerous times to the patron's record.
- 6.Simultaneous printing of notices on each campus.
- 7.Ability to use e-mail addresses on a case by case basis, so that we can, at some point, implement this feature.

Here are issues we need to continue to be in touch with LSO about:

- 1.Sending notices with incorrect return addresses to Gary Harris.
- 2.Sending duplicate patron records, as we discover them, to Betty Bereryman.
- 3.Sending the statistics groups to Janet that we would like identified for purposes of tracking the fines.
- 4.Sending to Linda Jenkins schedules for the "Library Information" section of MERLIN.

