

MERLIN Circulation/Reserves Committee
Meeting April 9, 1997, 10:00 a.m.

Library Systems Office/University of Missouri - Columbia

In attendance: Colleen Waltman, June DeWeese, Elizabeth Ader, Amy Arnott, Sara Van Looy, Bob Sanders, Gary Harris, George Rickerson, Janet Jackson, John Meyer, Needra Jackson, Nancy Morgan, John Huang, MaryAnn Samson, Mary Ann McFarland, Doris Beeson (I did not receive the list of attendees at this meeting so there are likely to be errors in the attendance list. Please advise if you find a mistake. Thanks, EAder)

PURGING/PRINTING FINES PAID FILE

There are 5,000 records in this file shared by all MERLIN sites. When all 5,000 records are used, the system deletes the information in the oldest 2,500 of these records. To date, MU Ellis Library has the responsibility to print these for all MERLIN sites before the information is dropped off the system. There is no way for LSO to purge these records by location, only by date. So from now on, each campus will be responsible for printing and purging their own records from this file. It is necessary for each campus to make a list of all statistics groups and hard wired terminals that account for fine moneys received. The information must be printed/purged from each of these groups/terminals individually. LSO provided the committee members with copies of instructions for printing daily circulation receipts and suggested including the last day of the previous printing to make sure no receipts are missed. Janet Jackson suggested that each campus can write a script which will pull these statistics groups and terminal numbers together to make the process faster. Any software that can implement the script via telnet session can be used. ENHANCEMENT SUGGESTION: The ability to limit statistics groups by location, location codes and/or identify a range of numbers when selecting statistics groups.

PURGING OF EXPIRED PATRON RECORDS

Each campus will be responsible for developing and implementing policy related to this issue and deleting patron records which are expired according to same. Please check with appropriate authority before deleting a record which may affect a student on another MERLIN campus.

REVIEW FILE REMINDER

Please use the correct procedures for naming and clearing these files.

NOTICE PROBLEMS

UMKC reported a problem with notices printing with information from different campuses in the elements. For example: return address, UMKC MNL Access Services; student, St. Louis University; message text, UM-C; fine rate,?. If any campus discovers notices like this, please send them to Betty Berryman and include the notice just before and

just following the problem notice. Also, identify the location source of the information in each element.

HOLD SHELF PROBLEMS

The hold-shelf slip and the clearance slip do not have dates printed on them.

Suggestions made that dates be stamped on these slips or clear the holds shelf status first and then print the slips, but group prefers a system assigned and printed date on these.

LSO ACTION ITEM: LSO will ask III about system printed dates on hold-shelf slips and hold-shelf clearance slips.

ON-THE-FLY PROBLEMS

These can be reduced/eliminated if all use the correct template for entering data.

PATRON BLOCK TABLE, MAX. ITEM A/B AND 2000 MAX CHECK-OUT

2000 items is the III defined maximum for check out. This limit poses a problem for at-the-bindery items. However, this limit cannot be changed so bindery units must have more than one "patron" account to get around this limit.

The Max. item A/B are not defined now in the patron block table. Each campus can assign a local value (as in number of items) but, all campuses must agree on what A and B represent in terms of materials. No campus in the group seems to need this right now. Just keep in mind for later if needed.

UMKC RECOMMENDATION TO TURN ON FIELDS According to the III manual, we can have two fixed fields turned on: YTDCIRC and LYRCIRC. UMKC requests activation of these two fields to keep past circulation information. This is helpful in evaluating collection use and maintaining reserve item circulation statistics. Currently when an item is taken off reserve, the TOT CHKOUT field resets to zero. All circulation statistics for that item during its reserve status are lost unless transferred to the YTDCIRC or LYRCIRC fields. Committee members had no objection to this request. LSO ACTION ITEM: LSO will investigate and if appropriate request III activate YTDCIRC and LYRCIRC fixed fields. However, group requested LSO discover if such action will have any impact on current statistics, for example will it reset renewals on items to zero? If there will not be any impact on current statistics, these fixed fields in the item record will be turned on July 1, 1997. If LSO discovers any change in current statistics, committee will discuss again.

SCAT TABLE REPORT

LSO is purchasing 1 per campus. They should be ready in the next few days. Each campus is responsible for setting up their table.

PHANTOM CHECKOUTS

UMC-ELLIS library reported that a book checked out to a UMKC - Law Library Courtesy Patron was found on the shelves at the UMC - Engineering Library. The patron denied checking out the book and when the book was found UMC circ personnel tried to duplicate the

transaction and the system would not allow the check out. IUG offers the following enhancement to correct this problem:

"Option to password protect the ability to perform searches by index key in the check out function, which is used when checking out on-the-fly materials. This can eliminate incorrect checkouts which occur when a key is inadvertently struck before a barcode is scanned, causing the system to perform an indexed search on the key which was struck and use the numbers in the barcode to select a record from the resultant browse."

LSO advises any campus discovering phantom checkouts to send all examples to LSO and include item number and patron number. LSO will need to see the current circulation record so don't discharge the item until LSO has time to investigate. UMKC suggests giving such items a claims-returned status as LSO needs the record in the data base for at least a week.

PIN's

UMKC requested a discussion of PIN's citing patron security issues related to the use of only the SSN for patron initiated borrowing, patron initiated renewal, view patron record functions. George Rickerson stated his opposition to the use of PIN's based on the need to coordinate such use with each campus administration and campus computing directors. Students will call the campus computing help desk with questions related to their PIN's. The help desk personnel will not be able to answer the questions - will have to refer to libraries. He is not opposed from a service point of view. He did coordinate the decision related to using SSN's to access OVID. Committee members cited the need to protect the security of the patron record as provided in Missouri law. Chair requested each campus to come to a consensus regarding the use of PIN's so a decision can be made. Will need to know if PIN's will be overlaid in subsequent information loads.

GARY HARRIS REPORT ON III RESPONSE TO INQUIRIES RE: PATRON REQUEST

Harris distributed to all committee members a copy of answers he received from III. In addition, he offered the following information :

the patron initiated borrowing blocking table involves the use of I type, I status, and I location

"local" is defined by the location served by the login which allows for patron initiated borrowing traffic between branches on a campus

the number of requests allowed per patron in patron initiated borrowing can be limited

DEMONSTRATION OF PATRON REQUEST IN STAFF MODE

Still uncertain about paging slips - one printed did contain patron name and campus, delivery location, item identification. Also want to know if file of requests will remain in the system after printing or can these be found through management function by viewing patron

requests.

DISCUSSION OF LOCATION CODES AND/OR ITEM TYPES AS PATRON INITIATED BORROWING IS IMPLEMENTED, PARTICULARLY GOV. DOCS. AS AN ITEM TYPE. In

patron initiated borrowing, when a patron makes a request a title level hold is the default. Because of the way Gov. Docs. are being loaded into the system there will always be a title record and at least one item record. If the request is made against a multi-volume set, the paging slip will not match what is needed. The patron will have to know to enter in the "addition info" field the volume number or date of the item needed.

Also, we will need some item types blocked - it will not be possible to rely on location blocks only. Item type blocks are needed for areas containing some items we want to circulate and some items we do not want to circulate.

III is responsible for setting up the Patron Request Blocking Table and we do not know if it will display. Also unclear as to how many location code blocks and item blocks can be entered - we may have too many.

QUESTIONS AND OTHER ISSUES

Ohio Link has unified loan rules for patron initiated borrowing. MERLIN group will not do this. The owning library's loan rules apply to its item when requested by another campus's patron.

Saint Louis University reported their circulation receipts are printed with Univ. of Mo. at the top. This is confusing to their students and needs to be corrected. LSO ACTION ITEM: LSO will check with III to see if there is a limit on the number of characters for this field. In addition, they will ask what else in the system might be change if the information in this field is changed. The Committee agreed that all receipts should have the heading: MERLIN or MERLIN Circulation depending on the length of the field. LSO will get the information from III, send to chair of Circulation/Reserves Committee who will poll the voting members for a decision about this issue.

Following a discussion of retention of certain information in patron record fields the committee requested LSO ask III to protect some of these fields. LSO ACTION ITEM: The committee members recommended the following fields in the patron record be protected from overlaying in the patron record:

- e-mail address
- messages
- notes

The group agreed on a revised printing schedule:

7:00 a.m - 10:30 a.m.	UMC/UMR/UM-Law
10:30 a.m. - 12:30 p.m.	UMKC/UMKC-Law
12:30 p.m. - 2:30 p.m.	UMSL/SLU-Law

2:30 p.m. - 5:00 p.m. SLU Pius
5:00 p.m. - 6:00 p.m. SLU-HSC
6:00 p.m. to midnight- please post to list the day before you wish
to use any of this
time.

This is a good time to complete long printing jobs. Simultaneous printing is not exactly simultaneous. You can print previously collected data from one file while you collect data from another file only. June reported she was told at IUG III was looking into simultaneous printing, however, III does not seem to be TRUE simultaneous printing.

Members of the committee express concern regarding the expectation that in order to meet 24 hour turnaround on patron initiated borrowing requests we will have to print notices two times a day. This is not possible on an ongoing basis given the printing schedule.

Amy Arnott nominated Sarah Van Looy for Chair of the MERLIN Circulation

Committee. June DeWeese seconded the nomination. Colleen Waltman, Chair of the MERLIN Circulation Committee asked for any other nominations. None were forthcoming. Sarah Van Looy was elected unanimously to be the new Chair of this committee.

The committee thanked Colleen Waltman for her work on the committee and wished her well in her new job at the Illinois Institute of Technology.

Meeting adjourned at 3:00 p.m.

Submitted by: Elizabeth Ader