MERLIN Circulation Committee Meeting
September 24,1997, 10:00 a.m.

Library Systems Office/University of Missouri Columbia

In attendance: Sara VanLooy, Bob Sanders, Needra Jackson, MaryAnn Samson,
June DeWeese, Mary Ann McFarland, Barb Hufker, Judy Pallardy, Gary Harris,
Janet Jackson, John Meyer, Elizabeth Ader, Jill Standley, David Snead,
Doris Beeson

1) LSO update Sara asked Gary if he would provide the group with
information concerning Release 11 and Gary said that although it is
available we would not upgrade until a few issues have been solved and,
III is working on those issues.

Discussion followed concerning patron initiated borrowing on INNOPAC and
WebPAC and how the two interfaces behave very differently. For instance,
the ability of users to request items that are on-shelf at their "home"
library. Refer to handout "LOCATIONS SERVED TABLE IS USED FOR FIVE THINGS"

Our choice to "DENY IF LOCAL AVAILABLE" places a hold on the bibliographic
record. WebPAC does not check a loanrule at that time, so WebPAC patrons
were requesting unrequestable items. The WebPAC does not associate the
user with an III login and locations served, so the system does not know
where the user is located. This means that a WebPAC user will be able to
place a request for an item in the WebPAC regardless of his/her "home"
library. A user can place a WebPAC request for an item that is literally
on the shelf and within reach. Each campus will have to settle t he issue
of retrieving books for their patrons who are requesting books via WebPAC.

The good news is that Gary, at the request of this group, changed the type
of hold a user can place via WebPAC to "item-specific hold," which will
prevent unrequestable books (reference, reserves, journals from being
requested). It will also allow recalls.

We discussed the ramifications of changing the OPAC to match the WebPAC,
but consensus was not to change without further discussion and study on
each campus.

Gary reminded us to visit the office's webpage, which has the standards,
minutes, etc.

2) YTDCIRC & LYRCIRC fields. On UMKC recommendation to turn on they are
working well.

3) Emailing Notices - None of the campuses are using email solely right
now - no way to make sure people would get notices. Suggestion made that
we could prepare notices and email them and when the prompt "was the
printing alright" appeared say no and go back and print paper copy.

4) UM Libraries Depository Issues

Handout: DEPOSITORY WORKSHEET #C3 RULE SELECTION TABLE form filled out by Judy Pallardy.

Also see email message by Gary Harris explaining UMLD setup as virtual branch.

Action Item: Each campus either agrees to this form or create owns loan rules for depository items by October 1, 1997. Ellis will print paging slips.

5) Paid Enhancement Requests:

Recall as part of G function. Ohiolink already wants this as a paid request. This group would have wanted however; with "item specific hold" recalls can be placed.

An enhancement request would be to allow more than 2 months of stats on Patron requests. Statistics similar to the ones collected for other categories would be ideal - year to date, last year, etc.

6) ILL issues: MaryAnn Samson, Chair, MERLIN Interlibrary Loan Committee addressed the following issues:

a) The suggestion that MERLIN ILL/Circ committees merge or have joint meetings. It was agreed (consensus) that until the end of each chair's term, we will have joint meetings and then decide to propose that the committees merge. The ILL committee is meeting on October 22, 1997.

b) The MERLIN Interlibrary Loan Committee, at the direction of the Library Directors, is currently conducting a study of the turnaround time of the Patron Initiated Request function and traditional interlibrary loan within the MERLIN Libraries.

c) Bookwrap additions: Please add two new lines "date notice was printed" and "patron pick up date".

d) MaryAnn will compile the statistics when the study is completed.

7) Billing Problem in using the bursar's module to transfer monies from MERLIN to Bursar's office - MaryAnn Samson had a MU student she billed for late charge ($5) and, the student also received notice from MU. The student felt he was being double billed and, since MU's cashier collects the money it has no way of knowing a Law fine from a MU fine.

June is working with their cashier's office since their cashier system does not send things back to MERLIN because it is not set up to do that sort of thing. MU is using the Bursar's module - output to only not input from. They send to them from MERLIN both debits and credits but get nothing in return.

The other campuses (UMKC, UMSL, UMR, SLU) agree that if a patron comes in to pay a fine (rather than mailing the payment to the address on the fine

notice), they will credit that patron's account in MERLIN and mail the check to the appropriate place.

PATRON INITIATED REVISITED

Barb requested that the group go over the mechanics of patron initiated request and discuss Hold Cancellation notices. During the review, the "drop hold" cancellation notices were explained, and Gary demonstrated the way to create them. They must contain "drop hold" or "dh" in the notice name.

The courier was mentioned and everyone seemed to think it was going much better, and, faster!

Meeting adjourned around 2:45 p.m.

Submitted by: Doris Beeson