

# MERLIN Acquisitions/Serials Control Committee

## Minutes – 29 August 2006

Members Present: Becky Merrell (UMR), Minnie Breuer (UMR), Patrick Bickers (UMKC), Buddy Pennington (UMKC), Rich Rexroat (UMC-HSL), Glenn Higley (UMKC-Law), Needra Jackson (UMC-Law), Bette Stuart (UMC), Karen Darling (UMC).

Members Absent: Joyce Edinger (UMSL), David Owens (UMSL).

Other Attendees: Fran Stumpf (MOBIUS), Maggie Trish (UMR), Georgia Hall (UMR), Nancy Stancel (UMKC-Law), Sue Barnes (UMC), Adrienne Arden (UMC), Margaret (Jody) Webb (UMC).

*Becky Merrell (Chair) called the meeting to order at 10:00 a.m. Attendees introduced themselves.*

### 1. General discussion about using MILACQ and MILSER

- **Sending Invoices to PeopleSoft**
  - (P. Bickers) UMKC is encountering delays in getting new vendor codes and other problems with vouchers. They would like to be able to upload their invoices directly into PeopleSoft.
  - (K. Darling) UMC is doing electronic feeds directly to PeopleSoft and it seems to work well. They receive new vendor codes usually within a day or two. Karen offered to share details and assistance to UMKC.
- **Check-In Box Problem**
  - (B. Pennington) Millennium distinguishes between regular issues, indexes and supplements. When an issue is mistakenly checked in as a supplement or index, or vice versa, Millennium does not allow you to modify the issue type. To correct the issue type, you have to delete the box and insert a new one. In instances when the check in box is linked to an item record, you have to create both a new box and a new item record and delete the old ones. Buddy reported that according to III, a fix for this would require an enhancement.
- **Order Records**
  - K. Darling would like to avoid having to key information twice: once when ordering via the web and a second time to get the order information into MERLIN by using vendor websites to order and edifact to create and load the records to MERLIN. This may be a problem for MCO because UMC might be sending orders daily to multiple vendors, and sometimes more than once in the same day for rush orders. F. Stumpf will pass this concern on to Gary.
  - B. Pennington asked a question regarding entering order status records into MERLIN using EDIFACT. F. Stumpf will try to get an answer.

- (M. Breuer) After the new server was installed, Rolla began experiencing a loss of connectivity with the server while entering order records. The problem was reported to the Help Desk.
- (K. Darling) UMC does not know why it is getting duplicate exports of order records and authority records. The problem is occurring intermittently, and is under investigation.
- **Summary Screens**
  - In Millennium, the summary screens can be customized by each accounting unit. Each accounting unit can decide which fields they want to display and the order in which they want them to display. K. Darling asked if anyone had decided which fields to display and if they were happy with the decision. B. Pennington pointed out that the customization is by module. UMKC has the acquisitions and serials modules set up to match.
  - **ACTION ITEM:** B. Pennington will send the list of fields and their order to K. Darling.
  - (B. Pennington) Can the top portion be customized by accounting unit, or is it by cluster?
  - **ACTION ITEM:** F. Stumpf will investigate and get an answer.
- **Vendor Codes**
  - Special characters/symbols in vendor codes are a problem in Millennium. This is a III problem, and has not yet been fixed.
- **Enhancements that are in the works:**
  - Claiming – The enhancement will enable you to stop and restart claiming as in the text version.
  - Exporting pay fields – the enhancement will enable you to limit by date.
  - This loss of functionality (something we can still do in telnet) will not be available in 2006. The 2006 enhancement will provide the ability to export the elements of the PAID field (invoice #, invoice date, etc.) as separate columns in a spreadsheet. The loss of functionality appears to be in limbo. Something III knows is a problem but has provided no specifics on when we'll see it in Millennium.
- **Status 1 Order Records**
  - (P. Bickers) UMKC is having difficulty deleting order records. They are able to cancel, but not delete status 1 order records.
  - F. Stumpf suggested that you may need to be in the summary screen in order to delete the records.
  - Arden reported that she is able to delete from within the actual record – not the summary.
- **Summary Holdings**
  - There was discussion about the MARC summary holdings format. None of the libraries represented are currently implementing the MARC holdings format. It was reported that there is a problem with using the open dash in Millennium: Millennium moves the dash.

- **Macros**
  - There was discussion about macros. The consensus is that macros in Millennium are not as robust as the text-based version.
  - Examples of Millennium macros:
    - “Q” – When you are in the check in card and hit “Q”, it saves and closes the card in Millennium.
    - “T” – prints today’s date
    - “C” – brings up a calendar
    - “B” – blanks out the date
    - Left and right square brackets – use to move up and down within the boxes of a check in card
  - Shortcut Keys - Page number 100742 of the Millennium manual
  - **ACTION ITEM:** F. Stumpf will send a copy of the III documentation on macros to K. Darling.
- **Printing**
  - Rolla and UMC-Law reported they are printing routing slips with Millennium on 8 1/2x11” sheets of paper, one to a page.
- **Customer User Manuals on CS Direct Web Site**
  - New Customer User Manuals are available on the CS Direct web site. They are word files that can be locally edited for use in training.
- **Release 2007**
  - It was reported that Release 2007 will require more memory. Libraries may have to update their hardware.
- **Telnet**
  - F. Stumpf believes that the telnet version of MERLIN will remain available for some time. There are still some functions that can only be done using the telnet version.
- **Public Display**
  - Item Record Sorting
    - (B. Pennington) UMKC public services staff would like to have item records sorted in descending order so that recent volumes would display first. UMKC would be interested in changing the sort if it can easily be done (i.e. without having to change the sort record-by-record). All MERLIN libraries would have to agree to the change from ascending order to descending order.
    - An idea for a possible enhancement request would be to give patrons the option to display items records in ascending or descending order.
  - Check In Records
    - (B. Pennington) UMKC would like to have check in records sorted and displayed by location only. At present, all active check in records are displayed first (local library first), followed by all inactive check in records (local library first).

- **Serials Solutions**

- R. Rexroat asked if anyone is modifying Serials Solutions records. UMR is not. UMKC is adding call numbers so they can do subject level analysis of use.

- **System Printing**

- UMKC is experiencing problems with system printing. UMR's problem has been resolved.
- **ACTION ITEM:** UMKC can consult with UMR to help resolve their system printing problems.

## **2. MCO Announcements (F. Stumpf)**

1. Beth Fisher, the new Executive Director of MOBIUS, began August 1<sup>st</sup>.
2. Release 2006 bugs need to be worked out.
3. The training server is being upgraded today.
4. SLU clean up continues. 1.2 million items have been deleted. SLU accounting units have been changed to "UNUSED".
5. MCO staff are scheduled to receive YBP training tomorrow.
6. OCLC collection analysis – MCO staff – MCMAC Committee
7. Gary is writing a grant for agency software that will allow us to get individual collection statistics.
8. Training scheduled at MCO:
  - Sept. 28 – Global Update
  - Oct. 25-26 – Serials
  - Nov. 15 – TBD
  - Dec. 13-14 – Acquisitions

## **3. IUG 2006 Enhancement Cycle**

Winners of the recent enhancement cycle were reviewed.

## **4. IUG Report**

B. Pennington gave a report from IUG.

## **5. Materials Booking**

- None of the represented libraries are currently using the materials booking feature.
- F. Stumpf announced that MCO would do training for anyone interested in using it.

## **6. Chair Position**

The consensus was that Becky has done a fine job and we would like her to continue as chair. Becky graciously accepted.

## **7. Next Meeting**

Becky will schedule a meeting for a year from now.

*Meeting adjourned at 1:30 p.m.*

Submitted – Bette Stuart (9/21/06)