MERLIN ILS Coordinators Meeting

Friday, January 25, 2008
10:00 AM (rev1: 8/9/2009 12:21 PM)

CHAIRPERSON: Judy Maseles (MU)
MINUTES: Raleigh Muns (UMSL)

IN ATTENDANCE: Judy Maseles (MU), Raleigh Muns (UMSL), Sarah Cron (MU), Brenda Dingley (UMKC), Felicity Dykas (MU), Christopher Gould (MCO), Needra Jackson (MU Law), Kurt Kopp (LSO), Becky Merrell (MS&T), Hardy Pottinger (LSO), Nancy Stancel (UMKC Law), Maggie Trish (MS&T)

Agenda:
http://mulibraries.missouri.edu/guides/coordinators2008.htm

3. **MERLIN Issues (MCO/LSO)**
    a. **Handouts and notes from Coordinators**
        i. **See:** http://mco.mobius.missouri.edu/filemanager/list/289/

        ii. **Email subject lines**

ACTION ITEM: Refer to access services committee to come up with new subject lines for email

        iii. **Blocking table (limit by ITYPE)**

PSEUDO ACTION ITEM: Tell colleagues about this; will be investigated and discussed later. Some interest in doing this on other campuses, but not a pressing issue. You can use a blocking table to limit by ITYPE (we've been using the booking module to reserve rooms). This is cluster wide. Potential to monopolize ITYPEs. MU just added lots of DVDs.

        iv. **System options**

ACTION ITEM: Come up with a way to capture and "freeze" current settings so we can refer to these when they inadvertently change. We need a safety net. A centralized document. To be done following a review of System Options.

ACTION ITEM: Direct appropriate MERLIN Committees to review their relevant SYSTEM OPTIONS at their next meetings.
- See MANAGEMENT -- INFORMATION -- SYSTEM OPTIONS (text only) to review system options.
- See current system options screen shot:
  http://mulibraries.missouri.edu/engineering/merlinsystemoptions.jpg

ACTION ITEM: Keyword Search. Turn on "AVS Quote Insertion" setting to YES; Turn on "AVS Performs Adjacency Search" to "YES"

    b. **Transactions Files**

ACTION ITEM: Ask MQCC survey members to see what potential activities (Global Updates; suppress / unsupressing of records?) could be causing Transaction File problems (e.g., indexing). Transaction file fills up when a lot of indexing is going on; e.g., some recent work on the State Historical Society scope change (scope changes for item and bib recently done). MERLIN chose

not to purchase the re-indexing service so I had to do this by suppressing and unsupressing records. It costs about $1000 to do this when purchasing a new index. It was decided not to pay for a new index, so II spent about 6 months suppressing and unsupressing records. Our standing policy is that when the Transaction File hits 60 percent we run daily jobs. **IMPORTANT POINT: Suppressing and unsupressing a record causes reindexing.**
ACTION ITEM: Assuming no cost, request Innovative to increase size of transaction file.

c. **Persistent URLs and how to make them scope properly**

ACTION ITEM: Persistent URLs will be for entire MERLIN system (unscoped)

d. **Access to restricted MERLIN Information on the MCO website.**

ACTION ITEM: Recommend that MCO/MERLIN site be read-only available to any MERLIN staff member.
ACTION ITEM: Recommend to MERLIN Directors to see if Sunshine Law is relevant to allowing access to all pertinent resources not otherwise to be kept private due to contract or personnel (private) information. (NOTE problem with passwords and proprietary information in listserv archives.

e. **Bookbag**

ACTION ITEM? Send in a ticket request to MCO for moving up NO REQUESTABLE ITEMS message higher (make more prominent).

g. **RSS feeds (staging directory) (III Manual #107080 | LSO Issue #234)**
    i. http://merlin.mobius.umsystem.edu:2082
    ii. http://merlin.mobius.umsystem.edu:2082/search~S3

ACTION ITEM: We should wait until the RSS product is improved since it doesn't work as advertised and is inconsistent.
- Demonstrated here: http://merlin.mobius.umsystem.edu:2082~S3 (may not always work)
- There is a codeword that allows RSS feeds to be put on any page of the webpac. As many feeds as you want; anywhere you want.

h. **Reading history (http://maurice.bgsu.edu/screens/help_index5.html)**

ACTION ITEM: Refer this to MCDRSC for action. Recommendation is to implement and come up with an information page. E.g., see: http://maurice.bgsu.edu/screens/help_index5.html

- MU has created a fake patron you can use on request (Judy will give you ID and Password on request). This is set up only as "opt in." You can remove individual records, retaining only some (currently only implemented for fake patron).

4. **LSO/MCO changes - review; others needed?**

a. **WebPac Issues**
- LSO: Hardy put together a new system which manages all the webpac files using Perl Template Toolkit committed to our code repository so we can track changes; this is all built into LSO's issue tracker. He can now start working on all the calls that you report.

b. **RMO's**

i. **System Messages**

ACTION ITEM: forward the System Messages on to all MERLIN Committees (not the

Coordinators). (LSO has a script written for the System Messages which clears and mails them off to Hardy)

ii. **Bounced emails**

ACTION ITEM: Discontinue this RMO. If serious e-mail delivery issues crop up, the bounced e-mail tool can be used to diagnose the problem.

c. **Other Rolling Files**

i. **Licenses in Use**.

ACTION ITEM: Raw data will be sent to JUDY. Coordinators will make a decision in JULY as to dropping any licenses.
- LSO has been saving data on the use levels of licenses for several months. When licenses come up for renewal they should have about 1 year of data. This information is being captured so that we can see if we could cut back further on the number of licenses and save money. Licenses cost (proprietary info deleted). There is an open enrollment period for licenses is around August.

ii. **Override files**
Log file of overrides (etc.) actions by staff. This is a rolling file (about a month) and the information drops off. Recommend coordinators review this files as needed.

see ALTER SYSTEM PARAMETERS - LIST SYSTEM OVERRIDES (text mode only)

iii. **User searches**

ACTION ITEM: After discussion, recommend no change (retain 10 day current setting).

d. **MCO Problem reports**

ACTION ITEM: Turn on receipt notification (even if it's ugly) as an interim solution.
ACTION ITEM: Recommend the creation of a drop-down box of all MOBIUS coordinators so that they do not have to continually enter personal information.

MCO request:
- All tickets, including WebPac tickets should be submitted to MCO, and we would then pass things on to LSO when relevant. (May give LSO a heads up if you wish.)
- If you have screen shots and files supporting a problem, indicate in the ticket that you have them so that we can request them from you as needed. Do not submit them automatically when you fill out a MCO report form.

5. Coordinator Issues
a. **Alternate to represent MERLIN / MCAG**

ACTION ITEM: Raleigh Muns volunteered to be the MERLIN / MCAG alternate.
ACTION ITEM: Submit ticket to MCO to update
http://mco.mobius.missouri.edu/article/archive/346/ appropriately.

b. **Listservs and communications (MOBIUS, MERLIN-L, MCAG)**

ACTION ITEM: Open up a new ticket to populate MERLIN-L with all committee members, and allow UM staff and faculty to opt-in.
ACTION ITEM: Items that cross the areas of two or more MERLIN committees will be sent to MERLIN-L instead of all the committees.
ACTION ITEM: Judy will continute to forward MCAG items to the Coordinators and not to

MERLIN-L.

   c. Review Files - how to keep them open

ACTION ITEM: Use MERLIN-L to communicate review file problems.
ACTION ITEM: Notify via MERLIN-L that if anyone's file is more than 6 months old it can be deleted. Files should be renamed so that the date is updated.
ACTION ITEM: We can send out a standard message at need regarding deleting of unneeded review files. People can be warned in advance. If no response, we should be able to delete review files.

   d. **Review of Open Tickets**

ACTION ITEM: Send information regarding Open Tickets that have wide-spread effect to the Coordinators Lists (who will decide if we need to go beyond that).

   e. **Review Committee information on MCO (SLU still listed)**

     ii. MERLIN Committee Communication Guidelines

ACTION ITEM: M&ST reps will address general MERLIN Communication guidelines ton incorporate new role for MERLIN-L
ACTION ITEM: Charge the committees to review their online materials at the MCO site and update removing SLU references and personnel.
ACTION ITEM: Nancy Stancel will review Coordinator's Information and submit tickets to update removing SLU.

   f. **New Chair**

ACTION ITEM: Unanimous agreement that Judy was doing a fine job and if she is willing, can continue as chair of the committee.

6. **Report from overlay Task Force**
   - http://mulibraries.missouri.edu/wordpress/
   - MOBIUS Task Force on Search Overlay Software has started this ball reporting upward and we may get more answers about the specifics (do they work with federated searching, etc.) as this unfolds.

7. **MERLIN Committee/MOBIUS Committee Reports**

ACTION ITEM: Committee reports will be disseminated as they are received.

MISCELLANEOUS ISSUES:

ACTION ITEM: Send a request to MCDAC to look at putting links in Innreach regarding "how to authenticate" that leads to each campus.
http://mulibraries.missouri.edu/engineering/merlinids.htm
https://mobius.umsystem.edu/screens/ReqInfo.html
ACTION ITEM: Judy will re-work the MERLIN "UM ID HELP" box appropriately to reflect EMPLID lookup by staff and employees.
ACTION ITEM: System Messages will continue on the same schedule.

MEETING ADJOURNED