

Merlin Access Services Committee Meeting was held on February 21, 2006. In attendance were:

Mary Anderson, (UMKC); Lisandra Carmichael (UMSL); Diane Collins (UMC-Law); John Dethman (UMC-Law); June DeWeese (UMC-Ellis); Adrienne Detwiler (MCO); Liz Glankeler (SLU-Law); Tamara Guilford-Davis (UMC-Law); Gary Harris (MCO); Annette Howard (UMR); Shuqin Jiao (SLU-Pius); Terri Knouff (UMC-HSL); John Meyer (UMC-Ellis); Larry Ruzich (UMKC); Mary Ann Samson (SLU-Law); Trish Svendsen (SLU HSL); Mary Zettwoch (UMSL);

Mary Anderson brought meeting to order. A motion was made and seconded that the Merlin Access Services Committee Meeting October 19, 2005 minutes be approved.

Mary suggested that we start off the meeting by reviewing the notes from the February 7th, 2006 MAAC meeting.

- She pointed out that it was noted on the second page that SLU has asked to be the lender of last resort during the period that they're going out on their own as a cluster and that otherwise this list remains exactly the same. SLU Law said that we should keep in mind that we could always call if we have an emergency.
- Scott Britten has suggested that putting big and bold codes on the green MOBIUS bands will prove very helpful to those processing the books coming in and being sent out.
- The Mobius Lost Book Policy was reviewed.
- MAAC members present recommended one important revision for the Lost Book Policy. The borrowing library is now responsible for a book that it has requested until it gets back to the owning library. No longer does the in-transit state represent the end of the borrowing library's responsibility. They are now responsible essentially for the whole, entire time. A subcommittee was charged with the responsibility for rewording this section and bringing the revised document back to the committee.

THE SLU/MERLIN REQUEST FOR APPROVAL OF SPECIAL LOAN PERIODS:

- The status of our current cluster's request to the other Mobius libraries that the Merlin and SLU libraries might continue with our present loan periods was discussed. It was stated that so far, half of the libraries have responded approving our requests for the present generous loan periods between all MERLIN & SLU libraries.
- UMKC shared that although Miller Nichols Library wishes to keep 120 day loan periods for their grads, staff and faculty members, and four week loan periods for their undergrads; the UMKC Law and HSL libraries have decided that they would prefer 3 week loan periods.

SLU's MIGRATION:

- Mary Ann replied that the SLU catalog will be down for only 2 days, Sunday, May 21st and Monday, May 22nd and that they should be up again by either Tuesday or Wednesday.
- Shuqin and Mary Ann said that the SLU P.R. committee will have a Question and Answer website and that they would send the link out to everyone to answer questions in the future.
- It was asked whether the Merlin and SLU libraries would want to get their overdue notices set up the same with the new loan rules and the consensus was that the notices should remain the same.
- Adrienne said that this confirms that MCO will do that for SLU and Merlin. It was agreed by all that we'd like to keep two renewals.
- Shuqin said that she was also concerned about patron block for hold limits and that they would like to see a limit of 30 for faculty members and a limit of 10 or 20 for students. She asked whether it was possible to raise that amount ourselves.
- Adrienne said that there would be blocking tables to consider and that they would have to be set up with blocks with new loan rules.
- The question posed was whether an increase in maximum number of holds would be one which would have to be reviewed by Mobius, and whether faculty, staff and grads., would all be in categories slated for the increase.

THE RETURNED TOO LONG LIST:

The next topic for discussion that arose was the Returned Too Long List. It was acknowledged with sadness that the Merlin members would no longer be able to depend on Mary Ann to shoulder this responsibility.

- In recognition of the coming change, Mary Ann briefed everyone on the finer points of the Returned Too Long List. She explained that it works best when done twice a month, and if you do it when it is posted on the first of the month and the fifteenth. She stated that it is time consuming, taking about three hours, and if not done, simply builds. She cautioned everyone to keep in mind that although it is possible to keep it up by tending to it once a month, the reports do change twice a month, and often, the changes are radical.
- Mary Ann explained that she uses Excel because she finds it helpful for alphabetizing and sorting the item records with the cut & paste feature. She said that with each current down load you need to take out the old, and put in the new, and that she herself uses Mill. Circ. and installs the item record. She said that there is a help page on Excel spread to consult. She gets the file off MCO web page down load and then cleans it up for Excel. She always deletes out other records. She says that it's different than most Merlin reports because it includes information for all of the clusters.
- She also explained that "Returned Too Long" is actually a misnomer because the list includes overdues, which need to be scrutinized to determine whether they are actually still checked out or returned.

- It was asked whether we should take on the list individually or assign it to someone, and it was the consensus that we should just start with each Merlin campus being responsible for books from their own libraries. Everyone agreed that we can talk about making changes to this tactic if it was judged that this would be needed in the future.

We reaffirmed the plan that each Merlin campus will tend to own reports and the directions for accomplishing this are:

1) Go to the list posted on Mobius;

<http://mco.mobius.missouri.edu/article/archive/303/>

2) Go into our committee's section;

3) Under Documents Find the "Returned too Long" list;

4) Use the Excel spread sheet.

- It was noted that there are other reports under MAAC which need attention as well, they are on listed in the same area, and that we can go to the Help Desk for assistance if needed.
- The Inn Reach reports and directions exist there explaining how each report should be posted.
<http://mco.mobius.missouri.edu/article/archive/197/>
- The In Transit Too Long reports are also on the Mobius web site.
- Sometimes it is possible to check a book back in and clear up the problem, but ... if you notice that it's still a problem (either a "requested too long," or a "paged too long," or an "in-transit too long") please call MCO so they can work on it.

INDIVIDUAL ANNOUNCEMENTS:

- June reminded everyone that the 2006 Scholarly Communications Conference "Open Access was being held on what was then the next day, February 22, 2006.
- UMSL shared that they are gaining a new staff member Erica Marks in ILL, who is replacing Christina who had had a baby.
- Mary Anderson shared that David Jones has joined UMKC's Access Services and that while Larry is still there, David might be contacting people at some time.

VALIDATING PATRON RECORDS & DETERMINING EXPIRATION DATES:

The difference in how the expiration date was determined by our five different campuses was then discussed. All campuses present depended either on the enrollment indicator or the Cashier's Office.

- UMKC is linked to Cashiers Office and UMC is linked to a payment plan.
- UMSL said what they're going to use to validate library records is now in discussion, but it is their understanding that they will in the future be using the Registrar's information which will mark library records as valid as long as students are enrolled and taking a class. UMSL had lots of questions for the group related to their recent campus change in this policy.

MIGRATION CONCERNS WITH THE INPUT OF GARY HARRIS:

- Gary Harris stated that when the loan rule change takes effect in May, SLU Merlin checkouts will not be converted. He said that what needs to take place for the changes is pretty complicated and explained that what has to happen is first of all the outputting of data on March 27th. Before that date, they will be creating lots of lists of item records that MCO will output, and that Innovative will then be cutting these up into manageable sizes and loading them into SLU's server. He explained that they will have to look at SLU item records and identify candidates for suppression which will be done gradually, and will be accompanied by the creation of new codes.
- SLU shared that they are planning to encourage all their patrons to return all checked out books.
- There will be no in-transit status when you check in SLU items in MERLIN after the migration.
- Gary was very happy to report that MCO will be replacing their Merlin server this summer with a SUN server.
- It was agreed that it is quite positive that all Merlin libraries can tell their faculty that essentially, for them, nothing has changed.
- It was asked whether it might be possible to raise the number of items requested. Gary said that he would go back and look at the INN Reach rules-

INN-REACH ENHANCEMENTS:

- Gary said that the Inn Reach enhancements were partially dependent on our suggestions and if we had some wishes for improvements we should pass them on to him so he could pass them on to submit them for review and a vote.
- Mary Anderson said that we would set up a general time table.

NEXT MEETING:

- It was asked when the group should meet again. Annette suggested that we wait until September unless we needed an emergency meeting.
- Mary Anderson said that she must remind everyone that Lisandra is scheduled to be our fearless leader starting in July. Lisandra said that she would take care of everything!
- It was agreed that we would try to plan for our next meeting on Tues., Sept. 19th and reserve Tuesday, Sept. 26th as a backup if the room was not available on the 19th. With this, the meeting was adjourned.