

MERLIN Acquisitions /Serials Control Committee (MASCC) Meeting  
LSO Conference Room  
2 April 1996

## Minutes

Present: Rich Rexroat (UMC-HSL), Suzy Bent (UMC), Fay Watkins (UMR), Becky Merrell (UMR), Richard Amelung (SLU-LAW), Joyce Edinger (UMSL), Ellen Grewe (UMSL), Janet Jackson (LSO), Janet McKinney (UMKC-LAW), Gary Harris (LSO), Jack Montgomery (UMC-LAW), Brenda Dingley (UMKC), Robert Cleary (UMKC), Carla J. Paul (UMKC), Hunter Kevil (UMC), Alice Allen (UMC), Bette Stuart (UMC), Rhonda Glazier (UMC), Andy Stewart (UMR), Jan Herweg (SLU), Betty Berryman (LSO), George Rickerson (LSO), Patrick McCarthy (SLU), Scott Staugroom (SLU)

1. It was agreed to rotate recording of minutes by going down Brenda's list. Rich Rexroat (UMC-HSL) agreed to take minutes.

The minutes of last meeting were approved without corrections.

2. Announcements: Hunter Kevil requested that anyone who has experience with vendors of monographs, serials, standing orders, and binding and would like to share their experiences, please contact him. UMC is beginning to review bid responses and would like to hear from others of their experiences with the vendors. Brenda Dingley recommended that the vendors being considered by MU libraries be put on the MASCC e-mail list (macq-1@lists.missouri.edu) for comments.

3. LSO updates: George Rickerson reported that LSO is working on getting the remaining loads into MERLIN. They are: SLU gap tapes, MU retro and Documents loads, and UMR Autographics load. The remaining 930's will be loaded but LSO has found a problem in the loading profiles. This bug has to be corrected before the 930's will be loaded. George also reported that he is getting ready to place an order for the Cataloging Workstation. A discussion was held concerning the SCAT tables. It was decided that there was a need for one more table and this will be ordered when the tables for SLU are ordered. The allocations and naming will be done by LSO and they will let the coordinators know when they are ready to use.

Brenda reported that with Release II one can pull information from two different kinds of records when running statistical reports. Brenda asked if we need to schedule a meeting maybe in May to discuss fiscal year closing and pulling certain types of reports. Everyone was in agreement with this suggestion.

LSO updates cont.: Janet reported that the code "n" for suppression has been added to CODE3, ACQ TYPE has been changed to PAY TYPE, made default "-" when no label, turned off internal note printing, has set up a list of acquisition's options. She was reminded that SCODE3 on the serials checkin record needs the label for suppression added. Which has been added now.

Acquisition's options: Brenda asked: Do the approval load tables reside in the campus module or in MERLIN? Brenda will call Innovative with this

question. Committee members who have further questions concerning approval loads should contact Brenda. Janet discussed her handout, INNOPAC SYSTEM OPTIONS (Acquisitions options), MU/SLU 4/2/97. She needs the group to let her know at what percentage they wished for MERLIN to notify them as their funds decrease. When LSO does the new release we will have to check to see if what was entered is still correct or if it went to the default. Order types were discussed. UMSL would like to use order types 2-7 as the subfunds in their fund activity reports. They will contact Janet about their needs.

>From Release II Enhancements: The standard three-part INNOPAC Purchase Order form may now be produced on a laser printer. The form is identical to the tractor-fed form, except that the height of the form has been reduced by 1/6" to allow printing three forms in landscape mode ...

4. Standards for use of active/inactive checkin records: George has a request for more checkin records from UMKC-LAW. After reviewing the current use of checkin records in MERLIN, he has proposed to the ILS Coordinators that a standard be set up. Two reasons: 1. checkin records are expensive (\$1.00 for active, 35 cents for inactive) and 2. how they are used has an influence on what the library users see. The library directors have told George that they want him to continue to pay for them and standards should be written. MQCC has been instructed to write the standard with help. Examples of possible poor use of checkin records: 1. a bibliographic record with 2 checkins. This example was the result of the 930-load loading a second checkin record. Clean up of this type of situation would result in freeing up more checkin records for other uses. Libraries may want to put a higher priority in getting rid of these. The point of this example was really that the library should not attach checkin cards to titles for which they do not have a current subscription or standing order. If nothing has come since 1991, maybe checkin cards are not necessary. 2. A serials checkin record for items in the stacks and serials checkin records for items on reference. It was suggested that one could delete the reference checkin records and put in the identity field "Latest vol. on REFERENCE."

If one wants to see how many Serials Checkin Records and Checkin Cards have been allotted per campus, you can:

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M > MANAGEMENT information
I > INFORMATION about the system
Enter password
F > File information
S > System status
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under "Max allowed" the first number represents the number of serials checkin records allowed, the second number represents the number of checkin cards. Serials checkin records can have checkin cards attached but only up to the second number. The second number in parentheses may be modified by III.

It was asked if we need to have standards for the Library has: statements. George will talk to the other committees.

A discussion of Notes fields was held. Brenda asked if it was possible to have a variable note field that could be displayed to the public. Brenda will check with III.

5. Approval plan interface. It has been asked if there is a need to develop guidelines for approval plans loaded into MERLIN. UMKC is currently loading approval records. UMSL and UMC plan to in July. UMKC currently checks for duplicates by title key match. When merging duplicate bib. records select the bibliographic record with item attached, not the record with order record attached. Also when resolving duplicates, follow the MQCC Standards for Resolving Duplicates. [If you don't have access to this standard, I am happy to post to MASCC list, just let me know.]

One problem in the future as more libraries use approval plan loads is that we will have more and more duplicates. We could ask shared vendors if they could send one bibliographic record with multiple order records attached. Or we could have a match on vendor number if it is in the bibliographic record. Another problem will be scheduling of the loads. Currently UMKC works with Vivian to schedule their loading. As other libraries firm up plans to begin approval loads, they should notify the list.

6. Fixed field codes proposals for order records (Hunter): It was decided that Codes 1,2,3 and 4 will be left open and undefined and will not have labels. EXCEPT: "N" in Code3 for suppression. Hunter proposed to open up all the other values in the order type field. All agreed to open up and have no labels. For order type fields, UMSL will work with Janet on what they need, and the rest of the values will be opened up.

7. Scodes: LSO will open up all scodes.

8. Substitution phrases: There are 120 available for use. This will be discussed later.

9. Outstanding issues list: The list will be maintained on the LSO Web Pages. Anything to add should be given first to Brenda. Some corrections were made to the current list -- #2 and #3 should be combined, #5 should be deleted, #6 should be deleted, #7 should be an enhancement, second part of #7 should be dropped, and Brenda will modify #8.

Future discussions may include electronic ordering. At the next meeting there will be a workshop/discussion about end-of-year activities. The date is: MAY 14, 1997.

Respectfully submitted,

Richard J. Rexroat  
UMC-HSL  
7 April 1997