

MERLIN Access Services Committee Meeting Minutes

August 18, 2010

Members Present:

Terri Hall - MU
June DeWeese - MU
John Meyer - MU

Paul Sharpe - UMSL
Patrick Tansey - UMSL

Mary Anderson – UMKC
June Snell - MST
Annette Howard - MST

I. **Call to Order and Introductions:** Terri Hall

II. **Adoption of the Agenda:**

III. **Approval of Minutes:** June DeWeese made the 1st motion. Mary Anderson 2nd the motion. All others were in favor.

IV. **OLD BUSINESS:**

MERLIN has one Issue pending with MCO –Increase of patron loads throughout the year. One vote needed from UMSL and they voted yes.

RELEASE 2009A Enhancements to activate:

CIRCULATION:

#1: Optional retention of previous five patron record numbers that checked in an item.

VOTE = NO.

After a general discussion the decision was made not to activate. Mary Anderson stated that MERLIN had previously decided not to retain even one patron record that checked in an item, due to privacy. June DeWeese stated this should be the Patrons choice. Paul Sharpe stated that if we are subpoenaed there won't be any information for them to look at.

#2: New Collection Agency functionality to expose more of the detailed item information in the collection agency report.

VOTE = NO.

None of the MERLIN Libraries use this one.

V. **NEW BUSINESS:**

RELEASE 2009B Enhancements to activate:

No vote was needed on enhancements that have a III automatic setup.

CIRCULATION:

#1: Batch extension of due dates.

VOTE = YES.

Mary Anderson thought it would be useful especially in a disaster situation.

#4: Items that are checked out will now be available to reserve for a course when using Course Reserves.

VOTE = YES.

Most thought that it would be useful as a trial and if it doesn't work, then it could be turned off.

#5: Libraries using Item Status API to integrate Millennium Circulation and Express Lane with their RFID system will now be alerted if an item is recognized as an "incomplete set", i.e., a 2-disc set is missing 1 disc.

VOTE = NO.

None of the Merlin Libraries use this one.

#7: Library staff will not be able to extend the Pickup By date for items on the holdshelf.

VOTE = YES.

Already being manually done for MERLIN books. June Deweese thought it would be too confusing for students/staff, because we could extend pickup date for MERLIN and not MOBIUS. Mary Anderson thought each school could decide for themselves.

#12: When items are renewed online or by telephone, optionally retain the statistic group of the original checkout. This allows the renewal to be associated with the original checkout location when compiling statistics.

VOTE = YES.

June DeWeese said patrons may claim to never have visited the library before. Mary said it would be helpful to see where books were originally checked out.

#13: When opening a patron record in Millennium Circulation, library may choose to display all of the m-tagged message fields associated with the patron record in a single popup.

VOTE = YES

Mary Anderson said if there is something noteworthy they wanted to record in a patron record that they don't want the patron to see, UMK puts it in the note field and not the message field, because the note field does not pop-up. June DeWeese would like all her messages visible.

#15: Whenever a patron record is touched by any Innovative API or Web Service product, the CIRCATIVE field in the patron record will be updated. The affected products are: Patron API, SIP2, Fines Payment Web Service, Patron Update Web Service and My Millennium Web Service.

VOTE = YES.

There was some uncertainty as to when a patron record was updated, so the decision was made to try it and turn it off later, if needed.

#16: Libraries may page open locations first.

VOTE = Yes.

#17: Held Item mailing labels can contain the contents of the PMESSAGE field.

VOTE = NO

None of the Merlin Libraries use this one.

#18: Allow the blocking of held items at self-checkout stations.

VOTE = NO.

None of the Merlin Libraries use this one.

#19: Libraries may transfer Bursar Out/In files via SFTP.

VOTE = NO

UMC is only one using it.

MILLENNIUM GENERAL

#5: Millennium will allow certain fields to be required in a patron or item record, for example, a name would be required before it is possible to save a patron record.

VOTE = NO.

8: It will be possible to save sorting, exporting, and listing parameters in Millennium Create Lists. (IUG)

VOTE = YES.

Mary said there probably would be costs for increasing the maximum number of listing, sorting and exporting parameter sets. Terri stated we should say yes, and if any campus needed to add more sets they can find out for themselves about any costs involved. Mary thought we should take it back to our campus LIS team because it may affect every module.

INN-REACH

#1: New options are available for managing data when INN-Reach items are not returned by the borrower, including marking an INN-Reach loan as lost, updating the item record at the owning library, and interacting with Circulation-based billing. In addition, changes to the message that is provided when an item is claimed returned provide better clarity about the action the system will take when an INN-Reach loan is marked Claim Returned.

VOTE = NO.

June said this is similar to Claims Returned which people have used to get out of responsibility for losing books.

#5: Patrons will have the ability to indicate a “Not Needed After” date when placing an INN-Reach request. The system will automatically cancel the request if it is not filled before the patron specified date.

Vote = NO.

June said people misuse this by putting in the next day’s date thinking they will get books faster. Mary said this may cause confusion to the patrons.

#8: Staff will have the option to print Pick Up Anywhere paging slips separately from other INN-Reach paging slips in Millennium Circulation. (IUG)

VOTE= NO.

John said not needed since slips have large PUA printed on them.

#10: New options for managing Unicode and non-Unicode record storage when records are contributed to the central server are now available.

Item was discussed, but it was decided it was not one of Circulation’s items.

#14: DCB libraries will now receive a notification to put an item in transit when it is received at a location other than the correct pickup location, provided the receiving location is part of the same agency as the pickup location.

It was decided we need further clarification before we can make an informed decision.

WEB OPAC /WEBPAC PRO

#4: Enable display of the loan period for Course Reserves items. (IUG)

Library set up needed if wanting to increase the maximum number of listing, sorting, and exporting parameter sets to more than the default 100...

Mary Anderson said she would like this one for UMKC. Terry will ask for further clarification.

#13: Offer a special item status message that indicates the title has been checked in but is not on the holdshelf yet, giving staff time to get it processed.

VOTE = NO.

Mary Anderson said if we say yes, we need to configure time to hold table -- easier not to do.

VI. Adjourn Meeting: No date was decided for the next meeting. Terri Hall will send a list of dates for all to agree on.