

MERLIN ILL Committee Meeting, July 23, 1998
Held at Library Systems Office, UM-Columbia
Chaired by MaryAnn Samson
Minutes taken by David Shocklee

Attendees:

MaryAnn Samson, SLU Law
Gary Harris, LSO
Janet Jackson, LSO
June DeWeese, UMC
Tammy Green, UMC
Marilyn Voegelé, UMC
Delores Fisher, UMC
Alice Edwards, UMC HSC
John Meyer, UMC
Needra Jackson, UMC Law
Paul Buchanan, Wash. U.
Vicky Witte, Wash. U.
Nada Vaughn, Wash. U.
Bob Heyer-Gray, UMR
Minnie Breuer, UMR
Mary Zettwoch, UMSL
Doris Beeson, SLU Pius
David Shocklee, SLU Pius
Jean Parker, SLU Pius
P. J. Koch, SLU HSC
Mary Ann McFarland, SLU HSC
Shirley Baker, Wash. U.
Janet McKinney, UMKC Law
Elizabeth Ader, UMKC
Nancy Radonovich, UMKC
Amy Arnott, UMSL

The meeting began about 10 a.m.

MaryAnn Samson opened the meeting with the question of whether we should continue to date the patron-initiated book bands, even though the turnaround time study was over. Mary Zettwoch emphasized the importance of filling in the "to" and "from" sections on the book bands. Her staff had to check the system sometimes to understand where the book was headed. Mary Ann McFarland noted that books are sometimes delivered to the wrong library. June DeWeese suggested color coding as a possible solution. Gary Harris spoke about his experience with the SILO delivery system in Illinois. They stamped dates and circled library codes for destinations. A discussion followed about the idea of crossing out "to" and using "from" as the destination for returned books. Elizabeth Ader said she wanted to keep three elements: date printed out, date sent, and date received. George Rickerson thought it would be useful to continue dating the elements of the band for tracking purposes. Gary Harris wondered about doing random sampling of patron-initiated loans using the INNOPAC.

The meeting then moved to the ILL Best Practices Team from Washington University. Vicky Witte began with an overview of why the Best Practices

Team was formed and spoke about some of the advantages in ILL borrowing productivity from using the Colorado State University model as had been discussed at the MIRACL ILL Best Practices Meeting last April. Paul Buchanan then spoke about the visit July 9-10 by the MIRACL delegation (Shirley Baker and Paul Buchanan of Washington U., Ted Sheldon, UMKC, George Rickerson, LSO, and Mary Jackson, Association Of Research Libraries) to III in Emeryville, CA. The MIRACL delegation submitted a document entitled, Enhancing the INNOPAC ILL Module for MIRACL as a basis for discussion with III. (See the document which was distributed to the group.) Colorado State University uses their ZAP (proprietary software) electronic patron request form to send to OCLC via ILL PRISM Transfer where, after staff review and manipulation, it becomes an OCLC request. They use CLIO software to track the operation. The INNOPAC ILL Module has limitations, but perhaps the meeting with III will yield the desired improvements. Paul said the delegation was waiting to hear from III about their commitment to the suggestions for improvements, but III was interested. CLIO software would be okay for awhile until the ILL Module was ready. But III needs to write programs for checking local holdings, producing G-function (patron-initiated) requests, and routing to ILL if appropriate. Paul thought that Phase 1 and 2 of the 3 Phases outlined in the document were possible by the end of the year. He hoped III would get back to us by the year's end about Phase 3. Release 12 of the ILL Module fixes the problem of letting multiple staff members work on Review File requests. Also addressed in Release 12, or some subsequent upgrade of it, were the double updating of records and interface between OCLC and the INNOPAC ILM, as well as the ability to track copyright compliance information.

Mary Ann McFarland asked about a possible interface with DOCLINE. Paul Buchanan said this was mentioned to III, and CLIO would be interfacing with DOCLINE. Mary Zettwoch asked if Phase 2 (concerned with the automated checking of local holdings and producing of patron-initiated requests) would collect statistics on ILL and patron-initiated requests. Paul said this was not talked about specifically but the software should be able to track these. Patrons are not able to see their requests through CLIO, which is why Innovative software would be better. But they probably would not be able to do this by the end of the year. Janet McKinney asked why, if Phase 1 and 2 were not possible concurrently, that ILL Direct to OCLC was Phase 1 instead of Phase 2. Shirley Baker said this was not perfect but it speeds up the process. The average request sits in the ILL office for four days. George Rickerson commented that this was the biggest increase in productivity. I asked about books not checked out, but missing from the shelves. This prevented the patron from placing a G-function request and would adversely affect the automated production of these requests as outlined in Phase 2. June DeWeese said these books were being declared missing more quickly.

Mary Zettwoch suggested a status change in MERLIN for items that cannot be borrowed but were not necessarily non-circulating. Paul Buchanan said this was not mentioned to III, but was a good idea. June DeWeese stressed the importance of a software that would check local holdings and produce a patron-initiated request because this method of borrowing was faster. She asked Shirley Baker if we didn't have more leverage now than ever before because of MOBIUS. Shirley Baker thought that was true, and III had asked about MOBIUS. George Rickerson said he would be stunned if III couldn't do what

we were asking, that it was more a question of when. Shirley Baker said there would be a lot of publicity around the country for what happens here.

Nada Vaughn then spoke about some of the things she was doing to improve ILL borrowing. She had set up macros for Custom Holdings, six groups of libraries, each with several hundred locations. She suggested a simple way of adding new locations: go to the OCLC website, call up suppliers by state, cut and paste using commas between symbols, add "+" to add to whichever Custom Holdings group you want, and the system adds them in. She said the biggest challenge was user education. She would rather her patrons not use the Web request form because it went to e-mail. She preferred they use WorldCat instead so no rekeying by ILL staff was necessary. Her department made more use of macros to speed up processing, constantly monitored Custom Holdings for fastest suppliers, and made less use of document delivery if they could get fast service from free suppliers. Mary Zettwoch asked how Nada dealt with Enter My Symbol Twice libraries (which Custom Holdings cannot do). Nada replied that OCLC said it was a programming nightmare. Vicky Witte mentioned that Olin Library uses First Search, and asked if OVID has a way of cutting and pasting to a request. Mary Ann McFarland said her library uses OVID for patron requesting to ILL. I asked Nada how she handled locally owned requests. She said she stopped bothering to send a student to check the stacks because half the time the material wasn't there. She just went ahead and requested the material from another library. Shirley Baker said this was to provide better service to the patron. June DeWeese said her department still checked the stacks for locally owned material and thought about 25% of their ILL requests were owned by their library. Marilyn Voegelé thought it might be as high as 30%. Shirley Baker asked if she was hearing that we need to consider service to each other as well. MaryAnn Samson asked Nada what she was doing to streamline the lending side of ILL. She replied her department was trying to get photocopies out faster. Also, they had started to charge non-Missouri libraries and all law firms, which helped to cut down on requests. Vicky Witte mentioned that they had added a new scanner for ARIEL, but it wasn't hooked up yet. Shirley Baker said that both lending and borrowing were important to Best Practices and that University of Missouri at Columbia was part of an ARL study on lending practices.

At this point in the meeting, Shirley Baker received a communique from III and read it to the group. III had decided to use Phase 1 in an interim release of Release 12 this fall. Shirley Baker continued about how there had been a dramatic change in importance of ILL. Resource sharing was critical. ILL needed to work more like patron-initiated borrowing. We have an opportunity to revolutionize ILL in a year what took cataloging five to ten years.

The discussion then moved back to patron-initiated requests. MaryAnn Samson suggested the book bands should have the patron's last name first. Mary Zettwoch asked that the extra deep Rubbermaid tubs not be used because the one they weighed was 74 lbs. The courier driver from SLU Pius and the UMSL mail room people did not want to handle them. Also, the light blue Government Document depository tubs had been used for MERLIN loans and they should not be. June DeWeese added that the light blue tubs had caused confusion with delivery people. The tubs had sat one time on a loading dock for ten days. Mary Zettwoch mentioned a problem of getting mixed tubs, with some books

for UMSL and some for SLU, as an example. Elizabeth Ader said we should have standards for book bands. And for packing tubs, added June. MaryAnn Samson said she would write some standards and distribute them to the group.

Nancy Radonovich then brought up her question from the previous meeting of how to handle ILL requests from other than home library patrons. She had done a survey of several libraries around the country and the consensus was that these patrons had to go to their own library. She asked if the other libraries had an e-mail request form for these patrons. Mary Zettwoch said she would continue to process ILL requests from other University of Missouri campus students. MaryAnn Samson summarized that other than UMSL, the rest of us will not do it. Elizabeth Ader asked what this indicated for distance learning students. Mary Zettwoch said her library seemed to revise their policy each semester.

MaryAnn Samson then spoke about her library wanting to create separate patron records for law firm accounts. She wondered if there would be any problems with her creating duplicate ILL records with manual charges for law firms. There was no opposition to her doing this. MaryAnn then brought up ILL patron record standards and passed out example sheets to the group. The discussion then moved on to the patron-initiated and ILL turnaround studies. After some discussion, it was decided the statistics for these studies would be due to MaryAnn by September 1st. She would submit a compilation of these statistics to the MIRACL directors by October 1st.

The final item of business was the selection of a new chairperson. After some discussion, Janet McKinney volunteered and was acceptable to all.

A tentative date for the next meeting was set for October 29th for both the ILL and Circulation Committees. The morning half would be for Circulation and the afternoon half for Interlibrary Loan.

The meeting adjourned about 2:20 p.m.