To: Judy Ganson  
From: Marilyn Rogers  
Date: 2/8/08

SERIALS REPORT ON EFFICIENCIES, NEEDED ENHANCEMENTS, REPORTS DERIVED FROM, AND USES OF THE SYSTEM  2-8-08

Attached are separate reports from Molly Moore and Judy Casada reviewing serials checkin and serials acquisitions in relation to Millennium. Below is a brief review of some of the elements in their reports.

A. Serials checkin
   1. Molly monitors the IUG listserv for features that are used by other libraries. When IUG discussion involves new features, she and her staff discuss the possibility of implementing these features here.
   2. From monitoring the IUG listserv, Serials checkin has implemented the use of the “marc” note (“y” tag) to provide access information to the public in specific checkin records, such as the Swimsuit issue of “Sports Illustrated.”
   3. During the year, serials maintains a spreadsheet of enhancements for the serials module. In December 2007, serials submitted five enhancement requests to IUG. They are attached.
   4. Serials has implemented codes for the checkin records to assist in identifying materials, such as paid, exchange, gift titles for statistics and are planning codes for identifying titles that need the issues printed or converted to CD-ROM’s, usually for Special Collections.
   5. Serials checkin will consider “electronic claiming” when the claims agent has been in the position long enough to have a good understanding of the overall claims process.
   6. Serials checkin will review the UPDCNT and PCOUNT processes to see if they can be used efficiently in their work. Both of these processes are counting processes for serials.

B. Serials Acquisitions
   1. Processes in serials acquisitions are efficient. Use of codes, create lists, macros, and rapid update in the system contribute to the efficiency. These processes assisted in the planning and cancellation of journals during the 2008 Cancellation Project for serials acquisitions and checkin, vendors and publishers, library staff and the public.
   2. One of the important efficiencies is the use of electronic invoices from vendors. Large invoices from vendors/publisher are entered into our order records by ftp for Holly to process in InfoLinks.
   3. Serials Acquisitions did not request any acquisitions enhancements for IUG in December 2007. Two enhancements that we would have requested were already on the list: (1) When searching for titles in MilAcq, provide the ability to limit a list of titles to only show those with order records attached and (2) Increase the optional payment note of the paid field so that it can be up to 50 characters in order record.