CCLINC Implementation Team
Minutes of Meeting, 19 September 2000 (3:00 - 4:45)
Telephone conference call
Unapproved, but we wanted to get you the information ASAP.

PRESENT:

From the CCLINC libraries
Luella Teuton, Chair, CCLINC Steering Committee (Sandhills)
Gretchen Bell, Chair, CCLINC Training Subcommittee (Piedmont)
Lorraine Krichko, CCLINC Serials Subcommittee (Wake)
Linda Leighty (Pitt)
Debbie Luck, CCLINC Cataloging Subcommittee (Randolph)
Raye Oldham, CCLINC ILL Subcommittee (Sandhills)
Angela Sox (Gaston)
Linda Stone, CCLINC Acquisitions Subcommittee (Central Carolina)
Gloria Sutton, Bridges Editor (Wake)
Dan Swartout (Edgecombe)
Renee Watson, CCLINC Media Booking Subcommittee (Central Carolina)
John Wood (Rockingham)

From NCCCS
Ruth Bryan
Roxanne Davenport

From sirsi
Eric Cohen, CCLINC System Administrator
Mary Wood, Implementation Liaison
Terry Jarnigan, Manager, Library Products Group
Tracy Moyers, Dataload Specialist

ABSENT:
Pam Doyle

ANNOUNCEMENTS

1.   **TEMPORARY PROHIBITION**

   Please do not run any overdue notices until you get the green light to do so.
   See more on overdue notices below.

2. Anyone attending the CCLINC Users Group meeting, at the NCCCS Instructors' Conference in Greensboro at the Sheraton Greensboro Hotel at the Four Seasons / Joseph S. Koury Convention Center. The meeting will be on Tuesday, October 10, at 10:45 a.m., is welcome to attend the CCLINC Steering Committee and Implementation Committee meeting immediately following. See more on the Greensboro meeting below.

3. The CCLINC Quality Control Subcommittee has been disbanded. Each Subcommittee will handle its own quality control.

4. The Implementation Team will continue meeting each Tuesday at 3:00 p.m. via telephone conference call.

5. The CCLINC Acquisitions Subcommittee will meet Thursday, September 21, at 3:00. Libraries should send any acquisitions questions to Linda Stone before the meeting.

6. MARC/Cataloging training has been scheduled! See more on training below. The Implementation Team encourages as many people as possible to attend this training. Please remember that cataloging is the base of any automated system, and it's important for serials, acquisitions, reserves, and other librarians to attend in addition to those who "do" cataloging.

7. Please, won't someone volunteer to be CCLINC Circulation Subcommittee Chair? We really need someone in place who can coordinate efforts for circulation issues, which include overdue reports and also reserves.

PROHIBITIONS

1. Effective **IMMEDIATELY**: ALL active serials accounts are to stay in the TEST SERVER (Thelma) when working with their title records until further notice from the Serials Subcommittee. (If there is a particular title you want to work on, contact Roxanne Davenport to place the MARC record on the test server if it is not already present.) Any successful work will need to be redone later on Louise.
2. **DO NOT** complete any procedures or run any reports without **first limiting for your library**.
3. **DO NOT "remove" any titles or holdings.** Instead, change the locations for holdings to either DELETEME (if you will need the information in the future for statistical reporting or to reactivate the record) or DISCARD (if you just want to get rid of it and won't need the record **for any reason** in the future).
4. **DO NOT** do anything at all to a record that does not belong to your library. Be sure you check the "library" before changing or modifying a record.

ACTIONS FOR LIBRARIES

1. If you deleted items in May and believe that some of your deleted items are still in the database, the Implementation Team suggests you use the "deletes list" you prepared for the state auditors and manually check each title against the database.
2. If you know of any titles that are missing from the database, please send the titles to Linda Leighty. Linda will begin keeping a "Registry of Missing Titles." This registry will be posted periodically so that we can all check to see if any of the titles we know we own are on the list. If so, then someone can re-import the MARC record.
3. If you use user categories 1 and 2 in your library, you need to be aware that the user category field for the patron records for those patrons you have identified as user category 1 or 2 might be corrupted. You will need to review the record with the patron when the patron next checks out LRC materials.
4. Sirsi recommends that we train our staffs carefully so that, when they see a message about recirculating an item, they realize that the item probably wasn't checked in properly. Be sure that all circulation staff at your library know how to respond when any message about recirculating items appears.

ACTIONS FOR SIRSI

1. Beginning Wednesday, September 20, 2000, Eric will begin running and distributing the holds on the shelf report to the report runners at each library.
2. Eric is preparing a template for each library to use to run overdue notices. DO NOT try to run overdues until this is ready [We hope it will be ready within 2 days.].
3. When the template is ready for general use, Sirsi will set the notice count to "0" for all patrons.
5. Sirsi will send Ruth a list of the 6 general reference titles reloaded to the REVIEW location.

6. Sirsi will run a report for all database items that will compare the owning library and the barcode on the item. They will then notify the libraries about which items are listed as owned by one library but which have a barcode from a different library. The report will include the library, the title, and the barcode.
7. Sirsi will clean up user categories 1 and 2.

AGENDA ITEMS

<u>OVERDUE NOTICES</u>

1. The unacceptable wording on overdue notices has been replaced.
2. All notices, including overdue notices, can be opened in Word or another word processing program. Once there, each library can do a "find and replace" to adjust the wording to their own liking.
3. Eric is preparing a template for each library to use to run overdue notices. DO NOT try to run overdues until this is ready [We hope it will be ready within 2 days.].
4. When Eric finishes the template, Rockingham will alpha test it. Then, if John Wood is successful, Gaston and then Sandhills will beta test the template before we're all given access to it.
5. **IMPORTANT**: When the template is ready for general use, Sirsi will set the notice count to "0" for all patrons.
6. Even when using a template, you must pay close attention to the choices you make for the notice criteria. **Most important is to limit for your own library**.
7. **It's possible to do a test run for overdues without having your attempt count as a notice sent**. Check (or do not check) the box that indicates whether the notice should count as a notice sent.
8. **It's also possible for you to "view" notices without printing them**. Try this until you are satisfied that the notices will look like what you want them to look like.
9. Remember that you can open the notices in a word processing program and change any wording to suit your library.

<u>HOLDS</u>

1. Beginning Wednesday, September 20, 2000, Eric will begin running and distributing the holds on the shelf report to the report runners at each library.
2. Sirsi does not yet have an explanation for why the "place immediate hold" function is not working. The behavior of this function varies inconsistently from library to library.

<u>FORUM</u>

1. Ruth sent login information to each library director for using the Sirsi customer support pages and the NCCCS forum.
2. From the NCCCS forum, we can ask questions and follow discussions on topics of interest to our libraries.
3. CCLINC will also be posting some documents on the forum. These will include training aids and ILL information sheets for each library, for example. The relevant subcommittee must first approve any documents to be posted. Upon approval, the subcommittee chair will send the document to Gloria Sutton, <u>Bridges</u> Editor, who will post the document on the forum.
4. Roxanne will scan the general Sirsi customer support forum for information useful to CCLINC. Others can use this general forum as well.

<u>TRAINING</u>

1. Cataloging training has bee organized into 3 groups of sessions:
❖ General Cataloging, presented by SOLINET, sponsored by LRA
    When: week of October 2; 4 sessions -- 1 day each session
    Where: Guilford TCC
    Students: 25 per session
    Who: open to all LRA libraries
❖ Interpreting MARC, presented by SOLINET, sponsored by LRA
    When: week of Oct. 16; 4 sessions -- 1 day each session
    Where: Fayetteville TCC or Central Carolina CC
    Students: 25 per session
    Who: open to all LRA libraries
❖ Applications in Unicorn cataloging, presented by Roxanne Davenport
    When: week of Oct. 23 and/or week of Oct. 30
    Where: Central Carolina, possibly other locations across the state
    Students: 20-25 per session
    Who: CCLINC libraries only

2. Barbara McKibbin and Carolyn Oakley are handling the SOLINET training. Gretchen Bell, as the CCLINC Training Subcommittee Chair, is handling Roxanne's Roadshow.

BIBLIOGRAPHIC RECORDS and REPORTS ISSUES

1. Sirsi will send Ruth a list of the 6 general reference titles reloaded to the REVIEW location.
2. Ruth also has the report about which items have no prices.
3. Running bibliographic reports is still a problem for the libraries. Sirsi will send the Implementation Team the name of a librarian at Emory University who has used the Unicorn system and run reports for 7 years.
4. Sirsi strongly suggests that anyone running a bibliographic report look closely at the help screens that define the different output options. The helps tell what the different selections will do and also provide examples of what the report will look like.
5. To get your library's call number to appear in a bibliographic report, check "catalog shelflist" and have nothing checked for call number.
8. If you deleted items in May and believe that some of your deleted items are still in the database, the Implementation Team suggests you use the "deletes list" you prepared for the state auditors and manually check each title against the database.
9. If you know of any titles that are missing from the database, please send the titles to Linda Leighty. Linda will begin keeping a "Registry of Missing Titles." This registry will be posted periodically so that we can all check to see if any of the titles we know we own are on the list. If so, then someone can re-import the MARC record.
10. Roxanne will run the report "Check Nonfiling Indicators," but only when she has finished other duties and has time available to deal with the results.
11. Sirsi will run a report for all database items that will compare the owning library and the barcode on the item. They will then notify the libraries about which items are listed as owned by one library but which have a barcode from a different library. The report will include the library, the title, and the barcode.

CIRCULATION ISSUES

1. Sirsi will clean up user categories 1 and 2.   If you use these categories in your library, you need to be aware that the user category field for the patron records for those patrons you have identified as user category 1 or 2 might be corrupted. You will need to review the record with the patron when the patron next checks out LRC materials.

2. Correction to information about recirculating items: Sirsi is unable to turn off the ability to check out an item to 2 patrons at the same time. Sirsi recommends that we train our staffs carefully so that, when they see a message about recirculating an item, they realize that the item probably wasn't checked in properly. Be sure that all circulation staff at your library know how to respond when any message about recirculating items appears.

CCLINC USERS GROUP MEETING

1. The CCLINC Users Group will meet at the NCCCS Instructors' Conference in Greensboro at the Sheraton Greensboro Hotel at the Four Seasons / Joseph S. Koury Convention Center. The meeting will be on Tuesday, October 10, at 10:45 a.m.
2. Because this meeting will take place during the NCCCS Instructors Conference, the Conference organizers want everyone who plans to attend the Users Group meeting to pay the Conference registration fee. The Implementation Team decided that each library should make their own decision about whether to pay this fee.
3. The Implementation Team encourages as many librarians as possible to attend this meeting.

GENERAL QUESTIONS

1. How can I keep track of all the information I'm receiving about how to use Unicorn?
    The Implementation Team suggests that you create a special Unicorn folder on your desktop and save minutes and other documents to it.
2. Can we develop a dual language dictionary for Dynix to Unicorn translations?
    Yes, but the Implementation Team needs to know which terms you'd like translated. If you have suggestions for terms to be included, please send them to Linda Leighty.
3. How should I report problems to the helpdesk?
    It would help Eric and Sirsi if, when you report problems, that you include the following information:
    - As much detail as possible, including barcodes, etc.
    - Any deadlines you are facing that would make this problem one that should be resolved prior to the deadline.
    - Indication if this issue is a top priority issue. A "Priority Issue" is one that prevents your library from operating normally.

FROM A RECENT ISSUE OF **Library Systems Newsletter**

Sirsi Establishes Itself in Consortium Market

Sirsi Corp. has developed many database options to enable consortia to operate as one unit but retain the individual policies and security of each separate library. Since doing so, Sirsi has established itself in the consortium market. The latest consortia to select Sirsi's UnicornConsort are the Capital Region Library Council of Connecticut (34 multipurpose libraries), the Georgia Department of Technical and Adult Education (26 public libraries with 98 facilities), S.A.I.L.S. Library Network of Massachusetts (48 multitype libraries with 64 facilities) and the North Carolina Community College System (59 institutions).