

CCLINC Implementation Team
Minutes of Meeting, 5 September 2000 (3:00 - 5:00)
Telephone conference call
Unapproved, but we wanted to get you the information ASAP.

PRESENT:

From the CCLINC libraries

Gretchen Bell, Chair, CCLINC Training Subcommittee (Piedmont)
Lorraine Krichko, CCLINC Serials Subcommittee (Wake)
Linda Leighty (Pitt)
Debbie Luck, CCLINC Cataloging Subcommittee (Randolph)
Angela Sox (Gaston)
Linda Stone, CCLINC Acquisitions Subcommittee (Central Carolina)
Dan Swartout (Edgecombe)
John Wood (Rockingham)

From NCCCS

Pam Doyle
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:

Luella Teuton, Chair, CCLINC Steering Committee (Sandhills)
Raye Oldham, CCLINC ILL Subcommittee (Sandhills)

ANNOUNCEMENTS

1. The Implementation Team will continue meeting each Tuesday at 3:00 p.m. via telephone conference call.
2. It is possible to search by the old Dynix bib number. Choose the "general" search in WorkFlows and enter the number.
3. The full CCLINC Users Group will meet next at the NCCCS Instructors' Conference in Greensboro at the Sheraton Greensboro Hotel at Four Seasons / Joseph S. Koury Convention Center. The meeting will be on Tuesday, October 10, at 10:45 a.m.
4. The Implementation Team and the Steering Committee will meet immediately following the Users Group meeting.
5. The Cataloging Subcommittee will meet September 13.
6. The SmartPort group will meet following the Cataloging Subcommittee meeting.

The Implementation Team and the various CCLINC Subcommittees will compile a set of easy to use "how to" instructions that provide screen prints and basic steps for common procedures. These will be posted to the CCLINC FORUM that we'll have available in a few weeks. Some of these have been started, such as the circulation training guides distributed by Pitt. Others, as at Randolph, are in progress. Sirsi will give Roxanne the URL for procedural training materials developed by other Sirsi customers, and Roxanne will make these available to us as well. [Thanks to Mario at Randolph, here's the website that was mentioned in yesterday's conference call.

<http://www.libraries.rutgers.edu/rulib/ruldocs/train/index.htm>

Be alert that some of the info may not be as up-to-date as the version we're using. When I briefly looked at it, I noticed some dates several years back.]

7. NOTE: Because the meeting covered complex issues, I've tried to cull specific actions that everyone needs to be especially aware of.

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.

ACTIONS FOR LIBRARIES

1. Library Directors should supply the name of their serials contact person to the Serials Subcommittee, Lorraine Krichko, Chair, (Wake) if they have not already done so. ALL serials contact personnel should add the serials contact list to their own email and **most importantly, CHECK** their email **DAILY** for information regarding serials.
2. If an issue that seems to involve just one library or a group of libraries also affects you, please let Eric know.
3. The Implementation Team learned that the circulation flag (Y or N) can be set on a library by library basis. If a library selects "N," the public display in Webcat will contain text such as "NO CIRC," or a similar phrase.
4. Each library needs to decide how to handle multi-layered charging.
5. Edit the library's "intransit user" record so that the library's name and address will appear correctly in reports, including overdue notices.

ACTIONS FOR SIRSI

[See below for a further explanation of the issues listed in the Sirsi document, "NOCA Bibliographic Investigation."]

1. **RECOMMENDATION** from the Serials Subcommittee and the Implementation Team: That SIRSI provide a staff member who is knowledgeable about the serials area and who may be contacted regarding serials issues and concerns.
2. Sirsi has promised instructions for setting the properties for helpers, especially the "add temporary title" helper under the checkout wizard.
3. The Implementation Team decided that issue 4 will be **RESOLVED as soon as Sirsi completes this work.**
4. The Implementation Team requested a more complete explanation of the choices involved in issue 6.

5. Sirsi will send the libraries a report to resolve issue 7. The report will be sorted by library, by call number, and it will include the barcode. The report will list all items without prices IF the ITEM has one of the following ITEMTYPES: AUDIO, AV-MISC, BOOK, REFERENCE, VIDEOTAPE. The Implementation Team ranked missing prices as **priority #2**.
6. **VERY IMPORTANT:** The Implementation Team ranked issue 8 as **priority #1**. Sirsi will reload these titles with as complete holdings as possible. **The bib record will be good, and the holdings record will include all the libraries listed up to the point of truncation.**
7. The Implementation Team determined that issue #9 will be resolved as soon as Sirsi provides a report listing the items involved.
8. Sirsi will research whether they can fix the problems in issue #12 and will report to the Implementation Committee.
9. Sirsi has promised to clean up user categories 1 & 2 as soon as possible so that all curriculum codes will appear in category 1 and everything else will appear in category 2.
10. Sirsi will continue to work on getting our HOLDS function active. The Implementation Team ranked HOLDS as **priority #3**.
11. Sirsi will continue to set up the media desks.

AGENDA ITEMS

SERIALS ISSUES

The Serials Subcommittee, because of the numerous problems occurring in the serials area of the SIRS system and confusion among serials contact personnel regarding the appropriate steps to take in placing of titles under serials control, STRONGLY RECOMMENDS and URGENTLY REQUESTS the following:

2. 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.)
3. Library Directors should supply the name of their serials contact person to the Serials Subcommittee, Lorraine Krichko, Chair, (Wake) if they have not already done so. ALL serials contact personnel should add the serials contact list to their own email and most importantly, **CHECK** their email **DAILY** for information regarding serials.
4. That SIRS provide a staff member who is knowledgeable about the serials area and who may be contacted regarding serials issues and concerns.
5. That SIRS provide templates or concise instructions for placing titles under serials control so that corruption of other data in the system is prevented.

The above recommendations were approved by the CCLINC Implementation Team at the meeting September 5, 2000.

In reference to the Serials Subcommittee recommendation 4, Sirsi made a distinction between staff learning to use the Unicorn WorkFlows product and staff learning about MARC holdings records. Sirsi is able to help only with questions regarding WorkFlows and believes that the help screens are adequate for most situations. For additional information regarding MARC holdings, Sirsi refers CCLINC serials staff to the Library of Congress pages.

BIBLIOGRAPHIC RECORDS ISSUES

1. The Implementation Team discussed SMARTPORT, its timetable, and other associated issues.

SmartPort is a bibliographic gateway that allows a cataloger to import a MARC record from the Library of Congress. It is limited in its usefulness because the Library of Congress database is composed mainly of hardback books published by mainstream publishers. Very few AV materials, paperbacks, or books by other than mainstream publishers are included in the collection. Presently, five libraries are testing SmartPort. The following issues were referred to the Cataloging Subcommittee for discussion at their September 13 meeting:

1. A specific date for pilot project to end and criteria for evaluation at end of project need to be determined.
2. Pilot schools will meet following the Cataloging Subcommittee meeting to discuss an accepted procedure for using SmartPort
3. Determine who is responsible for overseeing SmartPort implementation (Implementation Team, CCLINC Steering Committee, CCLINC Cataloging Subcommittee, LRS, a combination, ???).
4. Discuss and agree upon match points used to overlay records.
5. Should colleges begin practicing SmartPort on the test server before procedures, etc. have been established by the pilot colleges? Bad habits might be hard to break once they've moved to the production server. But then again, practice makes perfect, so to say. This could get a good argument either way. And we all need to move forward on this as soon as possible, but we also need to be very careful.
6. Should colleges begin using SmartPort in the production server prior to cataloging training? Some probably could; some probably shouldn't. How to determine this? Who should determine this? This is a **real** tough one. The Cataloging Subcommittee is working on training. SOLINET has been contacted by Mary Davis at Alamance about the possibility of sessions on "Interpreting MARC Records." Bethanie Benson at Cape Fear (who is working on training issues for our subcommittee) is talking with Carolyn Oakley about LRA involvement. Pam, Roxanne, Bob, and Debbie will be talking with Linda Stone soon about possibilities through Central Carolina. And Roxanne will be doing some training on applying MARC on Unicorn. But it is so hard to pull all of this together quickly during fall semester when we are all so busy, but fall semester is when we need this training.
7. Define "cataloging." One thing we've discussed in the Cataloging Subcommittee is that we have no idea what someone actually does when they tell us they do "cataloging!" I suspect it only means that they do something at some level in the cataloging module!
8. The biggie!!! **Maintain database integrity!** We must make this the top priority, and we must prove to LRS that this is a priority with us in the way in which we proceed with SmartPort. SmartPort is extremely easy to use - easier than many of the SIRSI procedures encountered so far; however, the colleges should be warned that, although the procedure is easy, the interpretation of data and consequences of choices may not be as clear cut. Roxanne & Luella have had the most experience with SmartPort to this point, and they have information to share with us concerning SmartPort use.

The Implementation Team made the following decisions regarding adding new titles to the database.

1. All libraries should be aware of the different levels of record.
 - a) **Add Temporary Title** is what we used to call a FastAdd. It is created during a circulation transaction to allow a patron to check out **immediately** something that is not in the database. It is shadowed in Sirsi because the home location should be TEMPORARY.

When one of these items is returned, instead of saying STACKS or RESHELVING it will say TEMPORARY. This is the clue that it needs further processing and should not be put back on the shelf. This button is one of the helpers under the Checkout wizard. Sirsi will send instructions so that the helper properties can be set correctly.

EXAMPLES OF TEMPORARY TITLE USES:

- Check out a spare lamp for a projector
 - Check out something that normally doesn't circulate but is needed by an instructor for classroom use, such as a globe
 - Check out a book or other regular LRC item that hasn't yet been processed
- b) **Add Brief Title** is a brief record with that is not shadowed in most cases [Be sure your properties are set correctly!]. It is intended to be used
- as a title that LRS will later replace with a full MARC record, or
 - as a title that will be permanent, but include only brief information

Roxanne sent specific directions on how to add a brief title. The Implementation Team has amended these directions in the following manner.

STEPS [More graphically-pleasing, screen print type directions will be available soon.]

NOTE: You'll be able to follow these directions only if you are authorized to use both the cataloging toolbar and the circulation toolbar. If you aren't, and you need to, you need to let Eric know.

VERY IMPORTANT: If you are planning to send this record to LRS for them to overlay it with a full MARC record **or** you are planning later to overlay the record with one you import from the Library of Congress using SmartPort (after you've received training and clearance to do so), **then** you can stop after step 5.

1. From the cataloging toolbar, right click on a blank space and choose "Add button."
2. Scroll down and select TITLEBRADD.
3. Highlight TITLEBRADD and click OK.
4. Right click on the "Add brief title" wizard, choose properties, and set your properties.
BE ESPECIALLY CAREFUL ABOUT

- WHETHER THE LOCATION IS SET TO CATALOGING IF YOU PLAN FOR THIS RECORD TO BE OVERLAYED IN THE FUTURE
- WHETHER THE TITLE IS A PERMANENT PART OF YOUR COLLECTION
- WHETHER THE ITEM CIRCULATES
- WHETHER THE TITLE IS SHADOWED
- WHETHER YOU HAVE SELECTED THE "FORMAT" THAT CORRESPONDS TO THE MATERIAL YOU'RE CATALOGING.
- WHETHER (under the "use entries" line) YOU'VE SELECTED TEMPLATE
- ALL PROPERTIES WILL REMAIN IN PLACE UNTIL YOU CHANGE THEM.
 5. Now, when you click on "Add brief title," you should get the following fields to fill in:
ISBN
Personal author (**Please, please** choose from existing authors if at all possible--cut & paste.)
Title
Publication information
Physical description
General note
Contents note
Abstract
Local note
Subject term (**Please, please** choose from existing subject headings--cut & paste.)

If you plan for this record to be a permanent brief record [It will not be overlaid.], then continue with Roxanne's instructions regarding filing indicators, subfield indicators, and fixed fields.

DISCUSSION ABOUT SIRSI'S REPORT ON THEIR INVESTIGATION ABOUT OUR BIBLIOGRAPHIC RECORDS

VERY IMPORTANT: If an issue that seems to involve just one library or a group of libraries also affects you, please let Eric know. Also, if a library wants to view the documentation about any particular issue that Sirsi provided, please let me know.

Issue #1: Angela Sox reported that all of GAST-LINC item's were missing. All of the items were loaded into Unicorn. For example, the holding code "GALCD" would map the item's library to "GAST-LINC."

Resolution: Sirsi was instructed to use the DYNIX location and sub-location to overwrite the library that was set for the holding code. (The reasoning behind this decision was based on some libraries had used the same collection codes for both the main campus and branch libraries.) The items that contained a holding code belonging to "GAST-LINC" also contained a library field of "GA," which mapped to GASTON. This caused all of GAST-LINC items to load to the GASTON library. Upon written approval, Sirsi selected all items that had a holding code that belonged to "GAST-LINC" from the Asheville data export and used the barcodes to transfer the selected items to the GAST-LINC library. This process moved 336 items to the GAST-LINC library over the weekend of 8/26/2000.

❖ The Implementation Team decided this issue was **RESOLVED**.

Issue #2: There were a couple of libraries that reported they had items that migrated to Unicorn with an incorrect home location. Angela Sox from Morris Library (Gaston), supplied Sirsi with sample barcodes to use for research. To research this issue, Sirsi searched the Unicorn database for the barcodes reported and looked at the 949 tag and the 999 tag for the MARC record attached to the items in question. Sirsi looked for the holdings (949) tag containing the barcode in question and used the subfield-c (lc) of the 949 (DYNIX holdings tag) as a holding code to populated the item level information. The two examples below contain the requested 949 (holdings) tags.

Resolution: In both records, the holding code is GAGC. The holding code GAGC was mapped to the home location of "GENRL-COLL" and an item type of "BOOK."

❖ **Sirsi is still checking on other instances for issue 2.** Dan Swartout at Edgecombe reported that he found a fiction book in the general collection. You might want to be alert to the possibility.

Issue #3: Angela Sox at Morris Library asked if Sirsi would assist them in changing all items that had a Dynix collection code of "GALAW" to have a new home location of "LAW_REF".

Resolution: Sirsi will select all items exported in the Asheville tape that have a Dynix holding code of "GALAW." Sirsi will use the barcodes selected above to set the home location of these items to "LAW_REF."

❖ **The situation at Gaston is resolved.**

❖ **VERY IMPORTANT:** However, if any other libraries have similar requests, please let Eric know. Sirsi is willing to review mapping issues for a limited period of time only.

Issue #4: Penny Sermons at the BEAUFORT library, brought it to Sirsi's attention that their Videotapes did not migrate with the correct item type and home location.

Resolution: Sirsi discovered that a mistake had been made when the holding codes were entered into Sirsi. The holding code "BFVR" was entered with the information from the holding code above on the page, which was the PAMPHLET. Upon approval from the library, Sirsi will extract all items from the Asheville export that contain a holding code of "BFVR." Sirsi will use the barcodes from the selected items to change the item's type to "VIDEOTAPE," the home location will be changed to "VIDEOS," and the item category1 will be changed to "VHS."

- ❖ The Implementation Team decided that issue 4 will be **RESOLVED as soon as Sirsi completes this work.**

Issue #5: Penny Sermons at the BEAUFORT library asked why the number of pieces for the books on tape was always set to one. In most cases, this number should be more than one (1).

Resolution: Sirsi reviewed the data analysis document and the data that was exported for loading into Unicorn. Sirsi was not able to find any information in the data export to use to map this subfield of the item level information.

- ❖ The Implementation Team decided that Issue 5 was **RESOLVED.**

Issue #6: Kathy Williams at Martin Community College asked why their reference material was set so that it could circulate to the patrons with an override.

Resolution: Sirsi reviewed the holding code chart the libraries supplied and the holding codes for "MRHC", "MRNCREF", "MRREF" and "MRRES" contained mappings to set the circulate flag to "Y." Setting this flag to "N" would keep these items from being circulated. With written approval, Sirsi will select all items from the Asheville export with one of the holding codes listed above found in the subfield-c (collection code) of the Dynix export. Sirsi will use the barcode of the selected items to set the circulate flag to "N" for these items.

- ❖ The Implementation Team learned that the circulation flag (Y or N) can be set on a library by library basis. If a library selects "N," the public display in Webcat will contain text such as "NO CIRC," or a similar phrase.
- ❖ The Implementation Team requested a more complete explanation of the choices involved in issue 6.

Issue #7: There are several libraries that reported that the price information did not transfer for every item in the Unicorn system.

Resolution:

- ❖ Sirsi will send the libraries a report. The Implementation Team designated this issue **priority #2.**
- ❖ The report will be sorted
 - By library
 - By call number
 - And include the barcode
- ❖ The report will list all items without prices IF the ITEM has one of the following ITEMTYPES:
 - AUDIO
 - AV-MISC
 - BOOK
 - REFERENCE
 - VIDEOTAPE

Issue #8: Most of the libraries reported missing certain titles after Sirsi migrated the data into Unicorn.

Resolution: Although Sirsi may not be able to recover every item that is missing after the migration to Unicorn, Sirsi developed additional software to recover some of the item information that was lost in the export from the Dynix system. Sirsi sent a report last week explaining our findings with the MARC bibliographic records that were not in USMARC format. If approved by the libraries, the processing outline will recover the majority of the items that most of the libraries are missing.

- ❖ **VERY IMPORTANT:** The Implementation Team ranked **issue 8 as priority #1**.
- ❖ **Sirsi will reload these titles with as complete holdings as possible.**
- ❖ **The bib record will be good, and the holdings record will include all the libraries listed up to the point of truncation.**
- ❖ Some of the difficulties
 - Most of the missing items were recovered in the second loading of the ASHEVILLE data export.
 - However, there are still several colleges that are missing their copies of a few large reference books/sets. Sirsi found the following titles with their holdings:

- 1) Current biography yearbook
- 2) South eastern reporter. Second series.
- 3) Great books of the Western World. Encyclopaedia Britannica, inc., in collaboration with the University of Chicago. Robert Maynard Hutchins, editor in chief United States code service
- 4) American jurisprudence; a modern comprehensive text statement of American law, State and Federal
- 5) United States code annotated
- 6) North Carolina reports; cases argued and determined in the Supreme Court of North Carolina
- 7) Corpus juris secundum : complete restatement of the entire American law as developed by all reported cases
- 8) Twentieth-century literary criticism
- 9) Contemporary authors; a bio-bibliographical guide to current writers in fiction, general nonfiction, poetry, journalism, drama, motion pictures, television and other fields
- 10) Nineteenth-century literature criticism
- 11) Contemporary literary criticism

- Sirsi is going to describe the problem that was encountered and why records were not loaded by the tools that Sirsi uses to process MARC record. The USMARC format states that the first 5 digits of a MARC records describes the length of the MARC records.

In the example, "00540naa 2200157 450000100..." the first 5 digits (00540) describes the length of the MARC record. In this example, the MARC record would be 540 bytes long. In the 540th byte of the record, there must be a special character that marks the end of the record (octal value 035). With this in mind, USMARC standards states that a record can only be 99,999 bytes long (the first 5 digits of the MARC records would be all 9's). However, in the case of these bibliographic records that Sirsi received, the record was MORE than 99,999 bytes long, and the beginning of the MARC record would look like "107423cas 22182771 " for the title "Current biography yearbook". Please notice that the length of the record was marked with 6 digits and not 5. The USMARC standard states that the 6th byte of the MARC records represents the records status. In this case, it is "c" or "Corrected or revised records". However, this information is in the 7th byte and not the 6th byte. As you would imagine, this problem of the record's size being larger than 99,999 bytes causes the entire record to be in error.

- After trying to work with these records, Sirsi noticed that these records were being truncated after 100,005 bytes. This left Sirsi with two new problems to overcome.

- First, the record would state that it is 107423 bytes long. However, it was truncated after 100,005 bytes. Therefore, the end of record marker (octal 035) was never present for these records.
- This caused the next record in the file to be ignored/error out as well. Sirsi has found the following titles that were being ignored because of this situation, and they are listed below.

Powder metallurgy;|bproceedings.

Readings in price theory, selected by a committee of the American Economic Association.

Members of Congress, 1945-1970.

Crescent color guide to kittens /|cAngela Sayer.

The old-fashioned Dutch oven cookbook;|bcomplete with authentic sourdough baking, smoking fish and game, making jerky, pemmican, and other lost campfire arts.|cCover plate by Charles Conkling; sketches by Jack Ostergren.

Easy bulletin boards for the school library,|cby Melvyn K. Bowers.

By means of performance :intercultural studies of theatre and ritual credited by Richard Schechner and Willa Appel. Gatsby

Extensile exposure /|cArnold K. Henry.

Dictionary of literary biography yearbook.

Decorative napkin folding for beginners /|cLillian Oppenheimer and Natalie Epstein.

(NOTE: These titles were pulled directly from the 245 tag and may have some subfield markers included.)

SOLUTION:

Sirsi has written special software to extract these records from the ASHEVILLE data export. Sirsi also wrote a special tool to print these records into a format that can be loaded into the Unicorn system. If the libraries would like, Sirsi can make this file of record viewable before loading.

Sirsi can only load these records after receiving written approval from the libraries. This will solve the most of the missing items that the libraries are finding. However, there are many items that were truncated after the 99,999 bytes in the data export and therefore were NOT included in the data export. Since Sirsi never received these items, we will be unable to create the holdings for some of the remaining libraries. Sirsi can supply a report that gives the number of items per library for each of these titles listed above.

- The Bibliographic record will be there; there will be some holdings, but anything that falls after the truncation cannot be recovered. This is going to affect libraries that fall the end of the alphabet more than others, because these items' holding tags appear to be in alphabetical order according to the holding code.

Issue #9: A few libraries have reported some titles, which were always treated as REFERENCE material in the past, but are now appearing in Unicorn as BOOK/STACKS or in the general collection.

Resolution: This happened because of the Dynix collection code found in the subfield-c of the 949 tag in the data export. In this example from CC-LEE, the subfield-t or the Dynix ITYPE "CCREF" does reflect that the item is reference material. However, the holding code found in the subfield-c stated that this item was in the general collection "CCGEN."

- ❖ The Implementation Team determined that this issue will be resolved as soon as Sirsi provides a report listing the items involved.
- ❖ Issue #9 is also related to issue #2.
- ❖ **If your library has items where the itype does NOT match the Dynix collection codes, please let Sirsi know.**

❖ **Sirsi will need a list of the itypes involved.**

Issue #10: This issue represents a problem that has raised some real concerns and confusion. There are a couple of libraries that are reporting items attached to the incorrect title. Sirsi's first area of research was to find out if our de-duplication process had anything to do with this problem. Upon investigation, Sirsi found out that none of the items reported were even processed by our de-duplication process, which means the bibliographic records had unique title control keys.

Resolution: What Sirsi found is that the items were attached to the incorrect title in the Dynix export. Below I have pasted in the bibliographic records in question. I know that Deborah Luck at Randolph has been investigating this issue as well by comparing the records to their old Dynix system. There does not appear to be anything that Sirsi can do to correct this, since the data we received appears to have this problem. Our hope is to be able to give Deborah more information to help her find this problem, because Sirsi has no way to view the former system.

- ❖ The Implementation Team and Sirsi decided that these problems were pre-existing in the Dynix system and had been caused by incorrect de-dups.

Issue #11: Deborah Luck at Randolph reported that the barcode 39875000209411 should belong to the title The Stand. However, the item is attached to Annie John. When Sirsi retrieved the records for The Stand, Randolph has an item attached and, as Deborah pointed out, the barcode attached to the record for Randolph does not match the barcode on the book.

Resolution: This problem is different than the one described in Issue #10. First, Sirsi extracted the two affected titles from the data received in the first export. Below are the raw data records and their holdings statements in the 949 tags, which will make this a little clearer. Upon investigation, Sirsi found that the CIRC user at the Randolph library modified the first item, with the barcode of "33031000076576," attached to the title Annie John. Sirsi has extracted the transaction from the history log for clarification. On July 20, 2000, the barcode "33031000076576" was modified and given a new barcode or item ID of "39875000209411."

- ❖ Neither Debbie nor Linda (representing Randolph and Pitt, the two libraries involved in this issue), were totally satisfied with Sirsi's explanation, but we decided to let the matter drop.

Issue #12: the FLIP-FLOP problem: Several titles the libraries own in common show a "copy" designation instead of a "volume" designation. Sample titles include the following:

Who's who of American women
North Carolina legislation
World Book Encyclopedia
Encyclopedia Britannica
Worldmark Encyclopedia of the Nations
International Dictionary of Company Histories
Annals of America
New grove Dictionary of Music
Encyclopedia of World Art
Poetry for Students
Information Please Almanac
Mental Measurements Yearbook

Resolution: Sirsi has determined that there are really two problems here.

- The "flip-flop" problem occurs in 8,359 items.
- For another 140,000, the volume designation is just missing.

When Sirsi did the second data load, there was a problem with subfield "f." Sirsi suggests the libraries look in the NOTES field for any titles they discover with a "volume" problem, and the

correct volume designation will probably be there. Sirsi will research whether they can fix these problems and will report to the Implementation Committee.

RESOLUTION OF UNFINISHED BUSINESS

1. Sirsi has promised to clean up user categories 1 & 2 as soon as possible so that all curriculum codes will appear in category 1 and everything else will appear in category 2.
2. Eric has referred the HOLDS problem to Sirsi Software Development because he believes he's set up our system correctly so that we can place holds on onshelf items at other libraries, but Louise won't let us. Sirsi said that they expect to have resolution of this this week. The Implementation Team made resolution of the HOLDS issue **priority # 3**.
3. Related to the HOLDS issue is learning how to edit the library's "intransit user" record because it's from this record that all reports pull the library's address, etc. Follow these directions:

Here are the instructions to correct the overdue notice from printing LIBRARY NAME Intransit User.

- You will need to look up your library's intransit user. This can be done by going to the Look Up User Wizard on the circulation toolbar. You will need to type your library's name and search. This will bring a list of Users that have your college's name.
- Select the LIBRARY NAME Intransit User that is associated with your library. You will need to display this user and then click modify user. This will allow you to change the lastname, firstname field which is currently set the way you see it on overdue notice.
- Change the lastname, firstname to what you want the patron to see on the overdue notice.
- Tab to the Address tab and enter the address you wish to see on the notice. Click ok

These are the steps to make this look proper. Please make sure you do not change the id of the library. If you have any questions, please let me know. Thanks!

Sincerely,
Eric D. Cohen

4. Sirsi provided information related to changing the location for a group of items and also related to the "recirculation" issue (being able to check out an item to more than 1 user at a time. The following is Sirsi's information. Please read it carefully because each library will need to decide how they want to handle both changing the location and also recirculation.

Multi-layered Charging

One of the special features of Unicorn is the ability to charge an item out to more than one user at a time. This allows an item to be tracked through successive locations, with Unicorn automatically routing the item to its previous location upon subsequent discharges.

Layered charging, like other circulation functions, is controlled by policies. An item may be charged out to more than one user simultaneously only if the last of the users has a user profile that permits items to be recirculated from that user.

(If recirculation is not allowed, a CHECKOUT command will produce the message "ITEM CHARGED AND MAY NOT BE RECIRCULATED.")

To give a specific example, a group of items from the collection are gathered and will be displayed for a special exhibit. To reflect this temporary location the items will be charged to a special user with a user ID of DISPLAY. The DISPLAY user has an associated user profile that allows recirculation of items. This user also has a special location that will display in the public catalog to denote that these items are shelved in a different location of the library than usual. In this case, the location can be DISPLAY, EXHIBIT, etc.

It might be the policy of the library to still allow these items to be pulled out of the temporary location and circulated to users. The item, already charged to the DISPLAY user, can be recirculated to a library user. When the item is returned to the library, it is discharged. Unicorn automatically produces a message routing the item back to DISPLAY.

Once the item(s) is no longer required for the exhibit, then the items are discharged and Unicorn automatically produces a message to route the item back to its home location in the library (STACKS).

There is no limit to the number of special users that a library can create and use. Special user profiles and locations might have to be created to support the needs of these special user records. Keep these things in mind when planning to create a special user. What location do you want to display in the catalog? Do you want these items to be recirculated during the period of the temporary shelving status? What user ID do you plan to assign to this user? Which library will own this user record?

All this information will allow your system administrator to make the policy changes needed to support the use of this type of special user record.



5. Sirsi is still working on setting up the necessary "media desks" so that we can begin to use Materials Booking. To aid them, Sirsi asks that each library planning to use this feature of Unicorn please let Eric know. That way, he won't need to set up media desks for libraries that don't plan to use them.