*Items in **BOLD** are stuff I'm not sure is correct or worded correctly. Of course, there may be a lot of that in the Black type too! Most of the **BOLD** stuff is information I lifted from SC minutes of days gone by, so it may not work the same way now.*

Things to Know about CCLINC & Symphony

CCLINC in general

- When colleges request information on joining CCLINC, Colleen Turnage from the System Office sends them a packet which includes a new member application, a cost statement, a listing of the different trainings and any associated costs, an explanation of how on-going business costs are calculated, the basic hardware that is required, information on barcodes, and the cooperative agreement. A cover letter explains what everything is and clarifies that a college does not become a member of the consortium until after the CCLINC Cooperative Agreement has been signed by all parties and their money has been collected. If the System Office continues to fund the software contract payment as a system-wide project, then of course the payment is not collected directly from the college.
- Communication: There is a CC CCLINC list in Outlook. However, each library should be aware that there is a problem inherent in using the CC CCLINC list. Any "CC" list in Outlook is NOT made up of names, but rather is an aggregate of local lists aka "LL" which are created and maintained at the local college, usually by the IT staff. All library staff members should be on each college's LOCAL "LL CCLINC" list. Colleen Turnage maintains a CCLINC mailing list comprised of individuals' email addresses, but she is also dependent on the local libraries' notifying her of staff changes. The various CCLINC Subcommittee Chairs also try valiantly to maintain mailing lists of pertinent local library staff in their various areas of responsibility.
- CCLINC has two servers: the Live server (aka the Production server) which is where all normal work and transactions take place; and the Test server which is where new software upgrades are tested, new settings tried out, and training is done. The bib/item database in the production server is periodically copied over to the test server, but the test server's database is NOT meant to be a backup of the production server. Doing testing in the TEST database means that records may be merged, deleted, and mangled with impunity to see what happens. WE DO NOT WANT THIS HAPPENING IN THE LIVE DATABASE.
- The CCLINC consortium is governed by a Steering Committee, with functional policies proposed, reviewed and recommended by subcommittees for various functions. All CCLINC member library staff should be familiar with the CCLINC policies and procedures that directly affect them. These policies and procedures are on a web page hosted by LTS. Contact Colleen Turnage for login information, and for contact information for the Steering Committee and its members.
- Have questions? There are several resources for answers. For general questions or questions you don't know how to direct, you can start with Colleen Turnage at the System Office. For operational questions like system settings, authorizations, properties, etc., ask the Sirsi System Administrator, also at the System Office. For general policy questions, ask Colleen or the current Steering Committee chairperson. For questions on policy and

procedures in particular work areas such as Cataloging, Serials, Lending Services, etc., ask the appropriate current Subcommittee chairperson. You can always copy Colleen Turnage on your questions to the Sirsi System Administrator or the various CCLINC contacts to ensure follow-through.

The Database & System in general

- Assume all settings are global unless told otherwise. The System Administrator will be able to tell you which settings may be tailored to your individual library, but there are relatively few of these.
- A staff client must be loaded on all staff workstations in order to interact with the system. Certain settings can be customized in the Java client. For example, customized toolbars can be created in each client. However, the wizards that can be used by any given staff person are controlled by that staff person's login. The library director must tell the System Administrator which wizards to authorize in each desired login.
- At a single station used by multiple staff, some staff may be able to use certain wizards that other staff cannot, based on what their logins are authorized to use.
- "Generic" or "Function" logins can be created to be shared by multiple staff; for instance, a circulation station might be logged into the system with a generic login so that it can be manned by different staff without having to log in and out. There should be a generic CIRC and TECH login set up for each member college with enough wizards authorized to provide minimum functionality.
- Each wizard has to be authorized for each login. So if you want a login to be created for a new staff member or a shared function, then you have to tell the System Administrator which wizards you want authorized in that login.
- When using a wizard, especially for the first time, be sure that you review that wizard's properties and determine that they are set properly before beginning any activity. Not having the properties set correctly will cause difficulties and extra work.
- There is no need for "system" printers. All print jobs can be opened into a resident PC application (wordpad, notepad, MS WORD, or other word processor) and saved, printed, emailed or whatever from that application. Reports can be emailed from "within" Symphony, but there is a buffer limit on the number of characters that the email function can process, so lengthy reports will get truncated without notice if you email from the Reports function. Better to save the report to your PC and then email it using GroupWise or your email program of choice.
- Try to find choices for locations, types, statuses, notice headings, etc. that are already in existence that will do the function or create the end result you need. The numbers of unique locations, types, etc. is getting unwieldy. If an existing setting produces the desired effect, in most cases the public isn't going to know or care what it's called. If you feel you must request a new code, the request must be submitted to the appropriate subcommittee to begin the approval process.

- All member libraries are expected to participate in keeping the database as "clean" as possible. This means cataloging correctly, following policies, and occasionally running reports to reveal nonconforming data or other problems.
- Each library has its own gateway to the public catalog. You can choose to have your patrons "click" directly into your "own" catalog (i.e., searching already defaulted to your library) or the greater "CCLINC" catalog (all libraries).

Cataloging

- To put it simply, all information at the bibliographic record level is "community property," even if there is only one library's holdings attached. The Holdings level (call numbers and copy information) is where your local information resides. Information on the bib record cannot be edited without implications for all holders or potential holders. You DON'T find a "close" bib record and edit it to match your item. You find an exact match or one you can live with as is, and attach your holdings. If you can't find either, then you import an OCLC record that matches your item (if one is available) or you do original cataloging in CCLINC to create a bibliographic record for your item. If you do original cataloging and your item is permanent, the record will end up in OCLC when the batch uploading of new additions is done. The only exception to this limit on editing bibs is when information that is lacking may be added to improve the record, such as filling in the physical description field in CIP records.
- The library director and the staff member most actively involved in cataloging must attend the CCLINC Cataloging training. Staff involved with areas such as circulation, reserves, serials, media booking, etc. may not consider themselves "catalogers." However, if such staff CREATE BIB RECORDS in the database, they are in fact cataloging, and need to comply with policy. It would be beneficial if such staff could attend the CCLINC Cataloging training. If they cannot, the library director or staff cataloger should provide in-house training for such staff that passes on the pertinent information from the CCLINC training.
- Library staff will not be authorized to use the Smartport wizard or the Global Edit Wizard unless they have attended the CCLINC Cataloging training.
- There are a number of location settings that are SHADOWED – i.e., using these locations will prevent the item from showing in the public catalog because they "shadow" information at the copy level. SHADOWED locations include DISCARD, DELETEME, MISSING, LOST, INPROCESS, TEMPORARY and SHADOWME**. (What others?)**
- It is also possible to shadow bibs, call numbers and/or copies by using the SHADOW *helper*. It is against CCLINC policy to shadow anything at the bib, or title level, with the single exception of AV equipment records. For EVERYTHING else, one may shadow only one's local information, which is to say that shadowing can only be done at the call number or copy level.
- LTS will continue to periodically update college holdings in OCLC. Because this is the database that is searched for OCLC interlibrary loans, we want the information about which books we do hold in our libraries to be as accurate as possible. Records in the DELETEME file will be used to notify OCLC of withdrawals at our libraries. <u>The CCLINC libraries can help</u>

LTS by careful use of the "permanent" status when adding a record.   Please check "permanent" only if the item will truly be a permanent part of your collection.

- Every item record in the system MUST have an item ID (barcode). If you are creating an item record and forget to enter its barcode into the Item ID field, the system will fill that field with a system-assigned number. Also, forgetting to enter the barcode means that the system will respond with an "Item not found in catalog" message when that barcode is searched. This may lead to the unnecessary creation of temporary bibs by Circ staff handling such items.
- Using any REMOVE or DISCARD wizard makes everything go away beyond recall. If you want to weed an item, but need statistics on it, change its HOME LOCATION to DELETEME. Everything in DELETEME will be changed to DISCARD and removed by the Sirsi SA annually at the end of July.
- There is a difference between the Add Temporary Title Helper and the Add Brief Title wizard.
    - *Add Temporary Title* can be 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.   The record template does not allow very much descriptive information to be input. These records should be removed when the item is returned.
    - *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 will be overlaid later with a full MARC record, or
        - as a title that will be permanent, but include only brief information. This brief information should still be sufficient enough to allow another library to make "attaching" decisions, or to allow LRS to make "merging" decisions.
- The titles of temporary items should be entered in ALL CAPS. This alerts other libraries that the original holding library considers the bib to be temporary.

Lending Services

- Checked-in items show up in RESHELVING for a limited period of time, then they resume their home location.
- Circulation staff MUST check the holds report every morning. All member libraries are expected to participate in in-system "interlibrary loan," since the catalog is shared and users are expected to treat it as a single library system.
- **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.**

  o   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.

- **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.**
- **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.**
- **Remember that you can open the notices in a word processing program and change any wording to suit your library.**

Serials

- Serial holdings are reflected in the system by the addition of MARC serial holdings information to the appropriate bib record, and by creating one catalog holding (call number & copy) to indicate ownership.
- LTS owns inventory scanners which may be used by the colleges for inventory on a first-come, first-served basis. Each college is free to purchase its own inventory scanner if it wishes.

Reports

- All member libraries should have one staff member who is designated as the "report runner."
- DO NOT run any reports without first limiting to YOUR LIBRARY!!!!!! This CANNOT be emphasized enough! The System Administrator will run aggregate reports that provide information on a system-wide (all-libraries) as or if such reports are needed.
- **The original implementation team agreed that finished reports could be removed from the system after 30 days by the Sirsi System Administrator, and recommended that recurrent reports be saved as templates and that needed finished reports be saved to individuals' PC hard drives. (20010130 minutes) Is this 30-day removal still being done? As far as I can tell there was no such agreement made about report templates. Do we need to have one? Is there a way you can tell how active or inactive a template is?**
- Reports run faster when there is less activity on the system. The best time for people to schedule "wee hours of the morning" reports is between 3 am and 6 am. As a general rule, don't try to run reports between midnight and 3 am, that's when some of the system's self-programmed processes run, like index updating. Late afternoon and early evening is also a good time to run reports - early to mid-morning is NOT a good time to run reports.
- There is a Reports Manual on the CCLINC policies and procedures website that gives instructions and helpful hints for running the most commonly-used reports.

Acquisitions and/or Media Booking

- The capability of performing acquisitions and media booking functionality exists in Symphony but there are not active subcommittees for these functions at the present time.

Contact Colleen Turnage to put you in touch with users of these functions if you are interested.