CCLINC Implementation Team
Minutes of Telephone Conference Call, 12 May 2000 (2:00-3:25)
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 Committee (Piedmont)
Linda Leighty (Pitt)
Debbie Luck (Randolph)
Angela Sox (Gaston)
Linda Stone (Central Carolina)
Dan Swartout (Edgecombe)
John Wood (Rockingham)

From NCCCS

Pam Doyle
Roxanne Davenport
Ruth Bryan

From sirsi

Judy Culpepper, Manager, Delivery Department

ABSENT:
Lorraine Krichko (Wake)
Raye Oldham (Sandhills)

AGENDA ITEMS

Timeline

1. 18 May 2000: LRS will officially notify epixtech of which files we've selected to migrate.
2. Samples of data will be sent to sirsi. After their review and OK, the full data will be sent.
3. 26 May 2000: epixtech will have created the output for tapes and will send them directly to sirsi.
4. 31 May 2000: **All libraries and LRS will cease all Dynix activity other than circulation**. This prohibition includes **any activity, in any module** other than circulation.
5. TBA: Circulation will have a cut-off date as well. That date should be close to the end of June. The information about circulation is subject to change!
6. 1 July 2000: We will begin operations using the sirsi system. We may be limited to BIB, HOLDINGS, and the PATRON files at that time. However, we will have enough to be operational for our patrons and also enough to begin adding and modifying item records to take up where we left off 31 May.

Files and data elements expected to migrate

1. BIB
Includes BSE and fast add records.

2. HOLDINGS
Fields: call number, volume, classification field, copy, barcode, price, acquisitions date, date modified, date last checked out, date last inventoried, total number of checkouts, times inventoried, in-house use, circulation flag, permanency flag, item type, home location, current location, library, number of pieces, notes

3. PATRON
Fields: Barcode, Dynix Key, Name, agency, ptype, pstat [See note below regarding pstat; all information the sirsi system cannot interpret will migrate to a notes field. Pstat will not be lost, just not migrated as you might expect it to.], street, city, zip, phone, street2, city2, zip2, phone2, birthdate [See note below.], date.added, date.expired, lastuse.

> **NOTE**: Some confusion exists between what information will actually migrate and what sirsi features will be available to all libraries after migration.
> Example1: If you have a patron code XXFS (XX=your agency code; F=faculty; S=staff), then all of these patron records will migrate to the sirsi patron profile of "faculty." Why? Because you have the two categories together in one patron code, and the migration program will not distinguish who is faculty and who is staff. After migration, you'll be able to make this distinction, but only by looking at each individual record, identifying the staff, and entering this information into the sirsi record.
> Example 2: Because the sirsi software has a field for a 4-digit date for either a birth year or a graduation year, the data in the Dynix birthdate field will mugrate to a notes field if it doesn't match this 4-digit format.

2. CIRC.OUT
Fields: Patron Dynix Key, item barcode, agency, date.checked.out, duedate. Patron barcode.

3. PURF
Fields: Patron Dynix Key, item barcode, agency, fine amount, block code, Patron barcode.

4. NEWS (**This file will be used for Rockingham only**.)
Fields: Publication, Abstract, Subjects, publication date, title.

7.   All dates will appear as YYYYMMDD.

8.   Codes will appear as descriptions and not as codes.

8. MARC.HOLD (applies to serials only)
Fields: Dynix Bibkey, Physical description, Fixed length data, Location information - $b=agency code, $c=collection code, $i=call number, $+=copy, $x=non-public note, $z=public note, Main run pub pattern, Supplement pub pattern (if applicable), Index pub pattern (if applicable) [See note below.], Main run summary of Holdings, Supplement summary of holdings (if applicable), Indexes summary of holdings (if applicable), Alternate display main (if applicable), Alternate display supplements (if applicable), Alternate indexes (if applicable)

> **NOTE**: At the present time, these 11 libraries are active serials users.
Cleveland, Fayetteville, Gaston, Halifax, Mayland, Pitt, Randolph, Roanoke-Chowan, Sampson, Wake, Wilson. In sirsi, the system looks for the pub pattern in the MARC record. LRS says that the great majority of our records should be OK for this process. The pub pattern can be easily edited in sirsi.

Choices, etc.

1.   Whether you want your patrons to go directly to the search screen or first to a welcome screen will be a local option. There will be a welcome to CCLINC screen if you choose to use it.
2.   Sirsi recommends that we use their defaults until we have some experience with the system and can make informed choices about what we want to change. One change already suggested is this: The sirsi default sorts the titles on the bib summary screen in the order in which they were cataloged. So, if you have a 1967 book that just happened to be cataloged last, it will appear first. We'll probably change that sort order.

3. The UUGI (sirsi users' group) has web forums subdivided into interest groups. Although we are members of this group as a unit, each libraries' local SA will have a password to the customer pages, and we can join in the web forums. Our sirsi SA, Rita Nunn, will subscribe us to them.
4. Some of the statuses we currently have assigned to items will migrate, but others will not. Nor will any history information migrate. However, all blocks will migrate.
5. Sirsi will be able to strip out the ss# part of the Dynix user ID and will put it in the alternate ID field.
6. The Implementation Team is still working on a "don't forget" document. The calendar will not migrate. This kind of information will need to be printed out. Rita will ask us for this information so that she can enter it into sirsi. Remember, we're all in this together and it's likely that the information you want to print out from your records is the same as that others need. We'll tell you what and how to do this.
7. If you have discovered that you need a new circ rule, a new location, or some other change to information you've submitted, please wait until we're up and running on sirsi. It will be easy to make those changes then, with Rita's help!
8. If you submitted a code and have since deleted it, don't worry. The migration program will react appropriately to the absence of data.