

CCLINC Implementation Team
Minutes of Meeting, 12 September 2000 (3:00 - 5:00)
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)
Lorraine Krichko, CCLINC Serials Subcommittee (Wake)
Linda Leighty (Pitt)
Debbie Luck, CCLINC Cataloging Subcommittee (Randolph)
Raye Oldham, CCLINC ILL Subcommittee (Sandhills)
Angela Sox (Gaston)
Dan Swartout (Edgecombe)
John Wood (Rockingham)

From NCCCS

Pam Doyle
Roxanne Davenport

From sirsi

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

ABSENT:

Gretchen Bell, Chair, CCLINC Training Subcommittee (Piedmont)
Linda Stone, CCLINC Acquisitions Subcommittee (Central Carolina)
Ruth Bryan

ANNOUNCEMENTS

1. The unacceptable wording on the final overdue notice (about the collection agency) will be removed immediately.
2. All subcommittee chairs and Gloria Sutton (Wake), who is overseeing the updating of the Bridges manual, have been invited to join the Implementation Team.
3. "Place immediate hold" is still not working throughout CCLINC, but some holds are possible at some libraries.
4. Ruth is in Huntsville this week, receiving administrative training.
5. The Implementation Team will continue meeting each Tuesday at 3:00 p.m. via telephone conference call.
6. 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.
7. The Implementation Team and the Steering Committee will meet immediately following the Users Group meeting.

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. Search for the newly loaded general reference titles in the location of REVIEW and change the location for your library's holdings to the appropriate one for your library.
2. Run the "hold pickup notices" report.
3. Go to Thelma and review the following:
 - a) the display of the journal JAMA
 - b) the properties for helpers
4. Notify Eric of you library's choices about modifying the properties of helpers so that he can set up the properties for helpers on Louise.
5. Sirsi has received only 1 request for an change of itemtype or location for a large collection of items. If libraries want to make these changes, they need to let Eric know right away.
6. Notify Luella if you would be willing to serve as Circulation Subcommittee Chair. This subcommittee also handles reserves issues.
7. Notify Luella or the appropriate subcommittee chair if you or someone from your library would like to serve on a subcommittee.
8. Subcommittee chairs should create GroupWise mailing lists for all subcommittee members.
9. Check to make sure that you can replace an existing barcode by scanning in the new one and having it overlay the existing one.
10. 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.

ACTIONS FOR SIRSI

1. Run the report for missing prices and forward it to the libraries.
2. Continue to troubleshoot the "place immediate hold" function.
3. Eric will begin running the holds report for holds placed on items on the shelf and will forward it to the report runners at each college.
4. Eric will set up Thelma so that libraries have the necessary authority to change properties of helpers.
5. Sirsi will fix the records with the flip-flop problem.
6. Sirsi will continue to work to clean up user categories 1 and 2.
7. Eric will continue to create users for the "forum."
8. Eric will continue to set up the media desks for materials booking.
9. Eric will begin notifying all local SAs whenever he receives a trouble call about a universal problem we all need to know about.

AGENDA ITEMS

ISSUES REPORT FROM SIRSI

1. Yes, Sirsi has assigned someone to be the liaison for the Serials Subcommittee. The name of this person will be sent directly to Lorraine Krichko, CCLINC Serials Subcommittee (Wake).
2. Sirsi has reloaded the general reference titles that the Implementation Team ranked last week as priority 1. They should have been indexed last night (Tuesday, 12 September). These records did not load originally because the records were too long (too many holdings attached to them) and the load truncated before it was completed. The records will have a location of REVIEW and will be shadowed until each library looks at the list and fixes the location. The libraries at the end of the alphabet will probably have more work to do because their holdings still might not appear.
3. The report for the items with missing prices should be run today (13 September). Sirsi waited to run this report until the general reference titles were in the database.
4. 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. Because of the inconsistency, which does allow patrons at some libraries to place some kinds of holds, the Implementation Team recommends that libraries run the following holds reports:
 - a) HOLD PICKUP NOTICES
 - b) LIST ITEMS WITH HOLDS [This report is used primarily to clean up the holds shelf. It can alert you to items that have been on the holds shelf for "too long" (library defined) a time that need to be returned to the shelves.
 - c) In addition, Eric will begin running daily the report he needs to run to alert the libraries of holds placed on items on the shelf.
5. Sirsi recommends that CCLINC libraries take a closer look at the training aids at the Rutgers site listed in last week's minutes. In addition, the Serials Subcommittee recommends that libraries look at the journal JAMA in Thelma.
6. Libraries will need to make choices for how to set the properties for helpers. Eric will set up Thelma so that libraries have the necessary authority to change properties of helpers. The directions for how to do this are in the "help" documentation. Libraries can then determine which options they want for their helpers. Once they have decided, they need to notify Eric of their choices so that he can set up the properties for helpers on Louise. These will be set up library by library.
7. Sirsi has received only 1 request for an change of itemtype or location for a large collection of items. If libraries want to make these changes, they need to let Eric know right away.
8. Sirsi has sent to Ruth further explanation about how the circulate flag works.
9. Sirsi has researched the flip-flop problem and determined that they can fix those records where the volume designation became copy designations during the migration. There is some possibility of error, but the process should go smoothly, and any errors will be easily identified.
10. Sirsi is in the process of cleaning up user categories 1 and 2.
11. The "forum" which will be available for our use is in process of being set up. The set-up work has been done internally on the server. Now Eric will create users from each library so that we can access the forum and post messages, questions, or help screens.
12. Libraries have been notifying Eric about their intended use of materials booking. He is in process of creating the necessary media desks so that we can use this feature.
13. The documentation for StandAlone, which will allow us to continue to circulate materials even when the server is down, is ready. In addition, Sirsi has prepared a diskette with the necessary software for each library. Ruth will be bringing the diskettes back with her from Huntsville.
14. Ruth also has an up-to-date list of all CCLINC library policies.

ISSUES REPORT FROM CCLINC

1. All the CCLINC Subcommittees except the Circulation Subcommittee have chairs.
Luella Teuton, Chair, CCLINC Steering Committee (Sandhills)
Lorraine Krichko, CCLINC Serials Subcommittee (Wake)
Debbie Luck, CCLINC Cataloging Subcommittee (Randolph)
Raye Oldham, CCLINC ILL Subcommittee (Sandhills)
Gretchen Bell, Chair, CCLINC Training Subcommittee (Piedmont)
Linda Stone, CCLINC Acquisitions Subcommittee (Central Carolina)
Barbara McKibbin, CCLINC Quality Control Subcommittee (Cleveland)
Renee Watson, CCLINC Media Booking Subcommittee (Central Carolina)
2. Please let Luella know immediately if you would be willing to serve as Circulation Subcommittee Chair. This subcommittee also handles Reserves issues.
3. Anyone with their director's permission and who wants to can serve on a subcommittee.
4. The Cataloging and Serials subcommittees have become very active in working to resolve issues in their areas. The ILL and Training subcommittees have also met. The Acquisitions subcommittee is waiting for clarification about some global issues before meeting.
5. Please let Lorraine Krichko know immediately who at your library will be handling serials issues. It's important to designate a serials person even if you plan to wait before activating serials. It's important that this person receives critical information and keeps informed.
6. Subcommittee chairs can create GroupWise mailing lists, then export the list as a file, and then send the list to all subcommittee members. The subcommittee members can then import the file to their GroupWise accounts. Doing so will insure that all subcommittee members can communicate readily with each other.

ISSUES REPORT FROM LRS

CCLINC IMPLEMENTATION TEAM **September 12, 2000**

STATUS REPORT FROM LRS

What is the status of adding the new libraries?

South Piedmont was a DAC participant and Lenoir CC made an early commitment to join the CCLINC consortium, so their accounts have already been set up in Unicorn. Alamance CC and Tri-County CC joined after much of the pre-installation setup had been done, so they were delayed until the existing 39 libraries were up and running. Ruth Bryan and Mary Wood are working with the new libraries to get their accounts set up. As vacancies in the training occurred, staffs from the new libraries were added, so they are ready to begin adding their holdings.

The Cataloging Committee decided to continue the process of libraries adding their holdings to existing records rather than allowing colleges to do bibliographic and holdings data migrations. As soon as the accounts are set up, the colleges may begin adding their holdings to the CCLINC union database.

Are other libraries expressing interest?

The NC LITN consortium has been investigating the process and cost of joining CCLINC. At this time, they are content to continue as they are and have no immediate plans to join. They have expressed concern about not being allowed to migrate their bibliographic and holdings data.

No other libraries have expressed interest in joining.

Will the CCLINC resolutions passed at Alamance be discussed on October 10, and will we be told whether and how they were followed? Since 3 committees are mentioned in the resolutions, should they meet before the Oct. 10 CCLINC Users Group meeting?

The resolutions passed on August 7 were referred to the administration. Payment of the final invoice was delayed until legal counsel could review the terms of the contract and the issues. Many of the initial problems seemed to relate to the bibliographic and holdings data extraction received from epixtech. Resolution of the bibliographic dataload problems slowed Sirsi's ability to address other issues. Sirsi had shown commitment to work with the CCLINC libraries to correct dataload and setup problems. Sirsi had agreed to work with the CCLINC consortium to accelerate the implementation so the epixtech contract would not have to be extended. The colleges did not always provide Sirsi with information needed to set up Unicorn within a timely manner. After discussion of all these issues, the decision was made to pay 90 per cent of the final payment. The Library System Contract Team was asked to review Sirsi's proposal and to identify issues that they thought Sirsi should address before the remaining payment is released. A letter was sent to Sirsi advising them that 10 per cent of the final payment would be withheld until the issues identified by the Library System Contract Team had been resolved. They were asked to resolve the identified issues by September 30 or to provide by September 30 a timetable for addressing problems that could not be resolved by September 30.

At Sirsi' request, Bob Blackmun and Pamela Doyle had a telephone meeting with Sirsi representatives last week to review the issues identified and to give an update on some of them. Plans are being made for Terry Jarnigan to meet with the Library System Contract Team next week to review the issues and discuss Sirsi's plans for addressing them.

BIBLIOGRAPHIC RECORDS ISSUES

1. The system will begin autogenerating item ids. This function will become active after you receive these minutes to allow libraries time to check to make sure they can replace pre-existing barcodes easily.
2. ALL records that began life as Dynix records migrated with incorrect fixed fields, filing indicators, and subfield indicators. Fix these as you find them.
3. Running bibliographic reports is still a problem for the libraries.

CIRCULATION ISSUES

1. The overdue notices sent out without libraries' knowledge in the last few days were prepared and sent in error. A staff member at one of the libraries set up the overdue notices for her library incorrectly, and notices for all libraries were sent via email.
2. The libraries that have begun sending overdue notices were also affected because the Unicorn system keeps a count of the number of notices sent each patron and makes decisions about new notices based on that number. All notice counts incremented by 1 when the erroneous report was generated. As a result, Louise thought the system had sent notices (it had!) and told those libraries that their notices had already been sent even though they hadn't been.
3. The erroneous overdue report, which ran 7 times, has been canceled.
4. The Implementation Team approved the following wording for overdue notices:

1ST OVERDUE NOTICE

The following library materials are overdue and fines may be accruing. Please return them as soon as possible. Thank you

2ND OVERDUE NOTICE

The following library materials are overdue and fines may be accruing. Please return them as soon as possible. If the item has been lost, you are responsible for the replacement cost. Thank you.

3rd OVERDUE NOTICE

Please return the following items or contact the circulation desk.

FINAL OVERDUE NOTICE

This is the final overdue notice. We have sent you several notices already. Please return the following items or contact the circulation desk.

5. No library has been successful (library defined) in running and printing overdue notices. We really, really need a Circulation subcommittee chair so that the subcommittee can begin resolving this and other circulation issues.

EXAMPLES OF OTHER ISSUES:

- a) Renewing long lists of materials checked out to faculty without having to enter an override for each item.
- b) Preparing procedures for successfully running overdue notices.