

.Minutes of the CCLINC Steering Committee Meeting
Written by: Kathy Martin
April 16, 2002
2:00 pm via conference call

Decisions:

- You can't modify patron records from other schools any more (see Old Business: Restriction of Patron Records)
- The Training Subcommittee has been disbanded (see New Business: Discussion on the Training Subcommittee)

News:

- For one of us, it's North! to the future! (see New Business: Kathy Martin is moving to Alaska)
- **Check this out!**
http://www.ncccs.cc.nc.us/Library_Resources/Training/Library_Resources_Training.html
- Updated Steering Committee Contact sheet attached (see Appendix B)

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Present:

Ann Whitehurst, Serials Subcommittee Chair
Dan Swartout, Circulation/Reserves Subcommittee Chair
Gerry O'Neill, District I Rep
John Wood, Sirsi SA
Kathy Martin, Steering Committee Chair
Libby Stone, Acquisitions Subcommittee Chair
Pam Doyle, Director NCCCS LRS
Roxanne Davenport, NCCCS Coord. Of Library Info
Ruth Bryan, Coordinator of Library Information Technologies
Stephen Hawkins, District II Representative
Susan Williams, District VI Representative
Teresa Frohock, Cataloging Subcommittee Chair

Absent:

Chris Meister, District V Representative
Gloria Sutton, Bridges II Editor
Gretchen Bell, Training Subcommittee Chair
Luella Teuton, Past Steering Committee Chair
Renee Watson, Media Booking Chair
Bob Blackmun, Associate VP for Information Resources and Technology

Old Business

Upgrading of the Unicorn Client

Please see Appendix A for an explanation of key enhancements. The Steering Committee agreed that upgrading is needed. We do not want to fall too many versions behind. Please see the minutes from the last meeting for more information.

In regards to Demand Management, which is a suite of features that allows finer control of holds in the multi-library setting, everyone uses it or no one does (see Appendix A for further explanation).

In regards to “Global Item Edit,” we can choose to not have this feature. This issue has been turned over to the Cataloging Subcommittee for discussion and a recommendation (see Appendix A for further explanation).

The suggested schedule is to try get the upgrade on Thelma (the test server) the beginning of July, depending upon the completion of the authority work. When the upgrade is on Thelma, it’s features will be tested and pending approval the upgrade will be placed on Louise. Performing the necessary tasks on Louise to perform the upgrade will take a couple of days, and we will do our best to work around school schedules. The Steering Committee is staying cognizant of the fact the schools will be running end-of-the-year reports in July.

SA’s Job Description

The Sirsi System Administrator’s job description has been approved. It further clarifies and irons out points and issues that came up as we went through the succession of SA’s so that everyone has a clearer understanding of what is expected. The System Administrator will be receiving additional Unix training between now and the 1st of July. A copy of the “Statement of Work” has been sent to the library directors.

Restriction of Patron Records

The Steering Committee unanimously approved restricting patron records so that they could only be modified by the owning school.

New Business

Kathy’s Announcement

I am moving to Anchorage, Alaska. My last day of work at the Learning Resources Center at Pitt Community College will be May 31st. Thank you for giving me the opportunity to serve CCLINC; I will miss the people, my job, and North Carolina very much.

Set date/time for next meeting

Kathy Martin will be emailing the Steering Committee members to determine a time and date for the next meeting that will be more suitable for more people. The meeting will be via phone conference and will occur some time in May. If you have anything that you would like to see on the Steering Committee agenda, please email Kathy or any member of the Steering Committee by May 6, 2002 at the latest.

LRS Website

Check this out:

http://www.ncccs.cc.nc.us/Library_Resources/Training/Library_Resources_Training.html. It’s a website that Ruth Bryan has put together. On it, you can find a schedule of training, how many seats are still available – even who’s already signed up so that you can arrange car pooling! Be sure to bookmark it and check it often for updates.

Subcommittee Updates

Acquisitions Subcommittee Update by Libby Stone

Acquisitions Training is on May 7th.

Bridges Subcommittee Update by Gloria Sutton

No update at this time.

Cataloging Subcommittee Update by Teresa Frohock

The Cataloging Subcommittee received an email showing concern about the number of duplicates in the system. Upon further inspection, a lot are not exactly duplicates; however, now is a good time to remind everyone that it is important to maintain the integrity of the database, especially with the authority work going on, and to check WorkFlows before SmartPort for existing records when you are cataloging.

Circulation/Reserves Subcommittee Update by Dan Swartout

No update at this time.

ILL Subcommittee Update

Still no chair. The Steering Committee chair has sent the ILL Subcommittee members that are eligible to be the ILL subcommittee chair an email inviting them to rotate the chair -ship so that ILL has a voice in the Steering Committee meetings.

Media Booking Subcommittee Update by Renee Watson

No update at this time.

Serials Subcommittee Update by Ann Whitehurst (please remember that this update was given 4/16/2002)

The Serials training will take place Monday, April 22, 2002 in Raleigh. At the training, the Serials committee will set up a meeting date/time and will discuss the Serials Agreement.

Unicorn 2001 Key Enhancements

(There are not as many changes from 2000 to 2001 as we encountered when upgrading from Unicorn 99 to Unicorn 2000 – Ruth Bryan)

Demand Management (Holds)

(We have a choice to use this enhancement or continue to process holds as we are currently doing in Unicorn 2000)

A number of significant improvements have been made to the way in which Unicorn creates and fills holds for library users. This suite of features, collectively known as Demand Management, allows much finer control of holds in the multilibrary setting.

Demand Management will be enabled for new customers installed at Unicorn 2001, but will not be delivered by default when upgrading to Unicorn 2001. If your site wants to use Demand Management, contact the Sirsi Customer Support help desk after completing your upgrade.

◆ **Volume-level hold across all libraries**

One of these enhancements changes the way in which holds are placed on a specific volume of a multi-volume set. With Demand Management, users can now place a hold on a specific volume across multiple libraries in the system. Previously, holds could be placed across multiple libraries, but any volume in a multi-volume set would satisfy the hold. Users could place holds on specific volumes, but only in one library. Now, a user could place a hold on volume 2 of a set, for instance, and the first available copy of volume 2 in any library in which the user is permitted to place a hold would satisfy the hold.

◆ **Holds Fulfillment "My Patron First"**

One of the Demand Management features provides a new level of control for how holds are satisfied in multilibrary systems. Libraries will be able to define, through user-defined policies, whether precedence should be given to holds placed by users of the library in which the item becomes available (typically, the library in which a checked-out item is discharged, which might be different from the library which owns the item), whether precedence should be given to holds placed by users of the library which actually owns the item, or whether precedence should be given to the next user in the hold queue.

This enhancement gives libraries the option of having the system first check whether an item will satisfy a hold for one of its users, even if that user is not the first one in the hold queue. A branch library in a public library

system might select to give priority to its users so that best-sellers might not have to be put in transit quite so often. On the other hand, a library in a consortium may wish to give priority to its users before checking whether an item will satisfy a hold for a user of one of the other libraries in the consortium. In this case, a hold placed by a user associated with the item's owning library would take precedence over holds placed by users of other libraries, even if the item is returned to a library other than the owning library.

◆ **Holdable universe definitions and holds fill policy**

The method for determining which items may be held for which users has been greatly enhanced in Unicorn 2001. Previously, it was possible to limit users of a particular library to placing holds only at certain other libraries, but any such restrictions were applied across all item types. Now, it is possible to control through policies whether holds may be placed by any combination of item type, item's owning library, and user profile. If a hold may be placed, then it is possible to limit the set of libraries against which the hold may be placed. This holdable universe consists of all libraries, a subset of libraries in the system, just the library which owns the requested item, or no libraries (which in effect means no hold can be created).

Automatic Cutting of Slips/Receipts on Slip Printers

Libraries which use receipt printers to print checkout slips and receipts will enjoy a new feature in which receipts are automatically cut by the receipt printer. If the receipt printer offers this feature, WorkFlows can send the appropriate command so that library staff don't have to manually tear off the slip for the patron. This saves staff time and wear and tear on the printer.

Lookup Item search options stored as session properties

The item lookup step, which is used in WorkFlows to identify an item for display or editing, is used in many wizards. Library staff can set default values, such as limiting a search by item type or publication date, or can specify how retrieved records should be sorted. In previous releases, these search and display options could be set by library staff, and saved for that session and future sessions. However, staff might not remember the default values they established in a previous session.

Now, the search and display options for the Item Lookup step can be configured to display at the beginning of the workstation session, the first time a staff user needs to look up an item. Staff can then review their previous settings and adjust as necessary. Once a staff user has reviewed

those options, they are automatically applied to all item lookups.

Global Item Edit

(This enhancement will need to be reviewed by the Cataloging Subcommittee before upgrading to Unicorn 2001)

Catalogers will appreciate a time-saving feature that allows item characteristics such as item type, price, location, and item library to be changed for several copies in a single step. Catalogers will be able to select from a list of editable values, specify the new values to be used, and then apply those changes to all items whose barcodes are scanned.

In addition, catalogers will be able to edit copies attached to a given title by first searching for the title, then applying the global changes from the template to all copies or only to selected copies attached to the title.

As an added convenience, catalogers will also be able to print a listing, in call number order, of the copies that have been edited in the current session.

Configurable Lookup Item Search Fields

In many staff tasks, the first step is to identify the item that the staff will be working with. In previous releases, when looking up the item, the types of searches and browses that could be performed were predefined by the system and could not be modified by customers. In Unicorn 2001, however, libraries may add to and remove choices from the types of searches and browses that can be performed. The available search types can even be tailored to specific library units, so that the search types available in serials control wizards, for instance, could be different from those offered to users of the circulation wizards.

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