

CCLINC Implementation Team  
Minutes of Meeting, 29 August 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)  
Gretchen Bell, Chair, CCLINC Training Subcommittee (Piedmont)  
Lorraine Krichko, CCLINC Serials Subcommittee (Wake)  
Linda Leighty (Pitt)  
Debbie Luck, CCLINC Cataloging Subcommittee (Randolph)  
Raye Oldham, CCLINC ILL Subcommittee (Sandhills)  
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

AGENDA ITEMS

ANNOUNCEMENTS



1. By next week, the branch libraries should have their individualized WebCat gateways.
2. By the middle of September, the CCLINC libraries should have available to them a totally new kind of resource: a **keyword-searchable** message board, called a FORUM! The message forum will
  - a) be ours only...restricted to CCLINC libraries via login and password.
  - b) be a means by which colleges can ask questions, follow topic threads, and learn from each other.
  - c) be a place where special instructions for specific tasks can be posted.
  - d) reside on the Sirsi server and be maintained by Sirsi.
3. The ability to search by groups (as for all the branches at a college) will be available in unicorn 2000, due to be released in November.

## HOLDS

### STEPS FOR HANDLING HOLDS

1. Patron places hold on items on the shelf.
2. The CCLINC system administrator (Eric) runs PULLONSHELFHOLD report. Once this report is run, Eric will email it to the individuals who are on the "Report Runners" mailing list (those people identified as the ones responsible for running reports). Eric will email the report at approximately 9:00 a.m. each morning. The report runners can, in turn, notify the individuals at their libraries who are responsible for pulling the items off the shelf. This report outputs the holds for all libraries, dividing these libraries into sections in the report. The output will allow the staff to check the shelves to retrieve the items.
3. Take the items to the Circ Desk
4. Scan each item using the Trap Hold Wizard, following the directions within the wizard. Holds are linked to the user and made available so hold notices can be sent. You might be prompted to send item intransit to another library to fill a hold.
5. Helps are available online if you have further questions.
6. Here's an example of what the report will look like:

#### HOLD PICKUP LIST

Produced Wed Nov 25 16:52:59 CST 1998

Library: BRANCH3

F19 .H34

Sprague, Richard S

A Handful of spice; a miscellany of Maine literature and history. Edited  
by Richard S. Sprague

copy:1 id:5491-2001                    item type:BOOK                    location:STACKS  
user id:15001                    user name:Cook, Arthur

G650 1829 .R8

Ross, John, Sir, 1777-1856

Narrative of a second voyage in search of a north-west passage, and of a residence in the Arctic  
region

copy:1 id:5476-2001                    item type:BOOK                    location:STACKS  
user id:15001                    user name:Cook, Arthur

#### HOLD PICKUP LIST

Produced Wed Nov 25 16:53:00 CST 1998

Library: GREENFORD

512.24 ZAR COM

Zariski, Oscar, 1899-

Commutative algebra / by Oscar Zariski and Pierre Samuel ; with the cooperation of I.S. Cohen  
copy:2 id:20-3002                    item type:BOOK                    location:STACKS

user id:RAND

user name:Childs, Rand

PS374 .F3 M4 1965

Meyer, Roy Willard, 1925-

The middle western farm novel in the twentieth century / by Roy W. Meyer

copy:1 id:3075-1001

item type:BOOK

location:STACKS

user id:SIRSI

user name:Corporation, Sirsi

## 7. VERY IMPORTANT CAUTION!

When a patron places a hold through WebCat on a title that is owned by more than 1 library, the patron is prompted to identify a call number. The unicorn system then searches for other copies of that title, that are attached to that record, and that have the same call number. If the copy identified by the patron when the patron selects the call number is not available, the system does not roll the hold over to one of the copies owned by another library **unless the call number matches**.

Example of a title owned by 6 libraries:

### 931.1 Tut

**The murder of Tutankhamen : a true story / Bob Brier.**

**Brier, Bob.**

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Personal Author: [Brier, Bob.](#)

Title: [The murder of Tutankhamen : a true story / Bob Brier.](#)

Publication info: **New York : G.P. Putnam's Sons, c1998.**

Physical descrip: **xx, 264 p. : ill. ; 24 cm.**

Held by: **CC-LEE MARTIN MCDOWELL PITT ROCKINGHAM SANDHILLS**

Personal subject: [Tutankhamen, King of Egypt--Biography.](#)

Personal subject: [Tutankhamen, King of Egypt--Death and burial.](#)

Subject term: [Pharaohs--Biography.](#)

Geographic term: [Egypt--History--Eighteenth dynasty, ca. 1570-1320.](#)

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**Copy Material Location**

Call Numbers for: **PITT**

1) DT 87.5 .B667 1998                      1 BOOK    NONFICTION

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**Copy Material Location**

Call Numbers for: **MARTIN**

2) 932.014 Tut                                1 BOOK    NONFICTION

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**Copy Material Location**

Call Numbers for: **MCDOWELL**

3) 931.1 Tut                                  1 BOOK    NONFICTION

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**Copy Material Location**

Call Numbers for: **ROCKINGHAM**

4) 932.014 Bri                                1 BOOK    STACKS

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**Copy Material Location**

Call Numbers for: **SANDHILLS**

5) DT 87.5 .B667 1998                      1 BOOK    STACKS

IF THE PATRON SELECTED THE COPY AT EITHER PITT OR SANDHILLS, THE HOLD REQUEST WOULD GO TO THAT COLLEGE, AND IF IT COULD NOT BE FILLED, IT WOULD ROLL OVER TO THE OTHER COLLEGE...BECAUSE THE CALL NUMBERS MATCH. IF THE PATRON SELECTED THE COPY AT ONE OF THE OTHER COLLEGES, AND THE HOLD COULD NOT BE FILLED, THE HOLD COULD NOT BE FILLED AT ALL BECAUSE NONE OF THE OTHER CALL NUMBERS MATCH!

The circulation staff can place a system-wide hold that would not have the limitation above, but the limitation cannot be changed in WebCat. Why does it exist? Because Sirsi made the decision to have it work this way so that a patron could specify a specific hold on a volume in a multivolume set.

8. **RESTRICTING HOLDS:** Richmond and Cape Fear have elected to restrict holds to only their own patrons.
9. Report runners are advised to look in the "circulation reports" folder to review other reports related to holds that they might want to run at their libraries. Specifically, look at the report that identifies items that have been waiting on the holds shelf for an excessive period of time (as defined by the library) and not picked up. Running a report will identify these items, and the library can then reshelve them.

## ADDING AND WITHDRAWING TITLES

### 1. DELETEME and DISCARD

Because the libraries do not have the ability to remove a title, the Implementation Team has chosen this solution. The libraries **MUST** use the location DELETEME **only** for those records for which they later will need to extract statistical information for the IPEDS and other reports. The libraries **SHOULD** use DISCARD for any record they will not need to access in the future. The location DISCARD will be periodically wiped.

### 2. the PERMANENT flag

LRS will continue to periodically update the North Carolina Union Catalog at 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. LRS will be using records in the DELETEME file to notify OCLC of withdrawals at our libraries. LRS and Sirsi are working on a way to identify which additions to our collections should be included in updating the union catalog at OCLC. They will probably search using a combination of itemtype and location. The CCLINC libraries can help LRS 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.

### 3. RESTRICTING ACCESS to holdings and patron records not our own

Sirsi is currently unable to restrict our access to records at other libraries. However, the ability to restrict access to patron records will be available in unicorn 2000, due to be released in November. The ability to restrict access to holdings records will be available in March, 2001.

### 4. COMPUTER GENERATED BARCODES

Every record **MUST** have an item ID (its barcode). The Implementation Team authorized Sirsi to enable the software so that whenever an item is added, the computer will generate a barcode for the item. Having the computer enter an automatically generated barcode will help LRS because the alternative is for them to have to type "auto" in the barcode field for every record they add. If a library does not want the barcode field filled in and prefers instead an empty data well (empty box in the barcode field), that library can disable the barcode appearing by correctly setting their properties.

### 5. PROPERTIES

Be sure that you review your properties for all functions and determine that they are set properly before beginning **any** activity. The libraries are learning through a painful school of hard knocks that not having the properties set correctly will cause difficulties and extra work later on. Sirsi is preparing directions on how to set the properties for the "helpers." This information will be sent to all libraries. The admonition to set properties carefully also applies to circulation functions.

### 6. BAD RECORDS

If an item record does not meet our standards, should we attach to it anyway? Roxanne advises in these circumstances, that the library create a new record that will meet the library's standards, and also that the library notify LRS of the bad record and ask whether the 2 could be merged.

7. Sirsi is working on a special report regarding our bibliographic records. That will soon be available for the Implementation Team to review. When we have that, we'll be better able to make decisions about our database.

### 8. SMARTPORT

- a) The SmartPort utility and its use by the libraries will be the first item discussed in next Tuesday's meeting.
- b) Eric will send a login for the libraries to use to experiment with SmartPort on the test server, Thelma.
- c) Eventually, each library will have its own login and will be enabled to use SmartPort on the production server, Louise.

## LOGINS

1. Libraries should notify Eric when staff changes so that he can change the PINs for logins not specific to an individual (the generic logins or circ logins).
2. Those libraries which have not created a login for the circ desk should do so and send the information to Eric, using the forms previously used for creating staff logins. Please include how many circ stations you have operating because he'll need to enable to login to be used at more than 1 station if you have more than 1.
3. The OVERRIDE at the circ stations is the PIN for that login. Also, staff with sufficient authority can use their specific staff PINs as overrides in all modules to which they have access.
4. If your library has branches, Sirsi advises that you consider generic logins that could be used at all campuses. Many of the libraries with branches have staff who rotate from branch to branch. A generic login would assist them in being able to do the same functions, regardless of the location.

## OVERDUE NOTICES

1. The Implementation Team agreed to add the following wording to the second notice. It will be a sentence added to the wording of the first notice.  

"If the item has been lost, you are responsible for the replacement cost."
2. Because not all libraries use processing fees, the Implementation Team decided that this wording should assume that "replacement cost" included a processing fee for those libraries using one.
3. You can have a different number of notices for different user profiles. This can be done by running separate overdue reports by user profile.
4. If the price is selected to print, then yes it will show up with \$0.00 if there is no price in the record.
5. The default price can be changed in properties or it can be made as a global change.
6. Eric is preparing directions for each library on how to edit their "intransit user" record. There is one for each library, and this is the record the system looks at whenever it is adding the library name and address to any kind of report. He will send these directions to the Report Runners and also post them on the CCLINC forum page.
7. Bounced email (primarily bounced overdue notices) will go directly to Eric. He, in turn, will notify the library involved. The library then has the responsibility to modify the patron record by deleting the incorrect email address.

## STATISTICS

1. You can have reserve, charges, serial charges, and renewals in the statistics report.

## INFO DESK

1. Info Desk is a feature of WebCat. In it, we can list library hours, special messages, and booklists (like lists of new titles, bestsellers, etc).
2. Because we now each have an individual gateway to WebCat, we can use Info Desk specifically for our library.
3. When your library is ready to make use of this nice feature, notify Eric, and he'll set it up for you.

### OTHER CIRCULATION ISSUES

1. Instructions for using StandAlone, the circulation software that will allow us to continue to check materials in and out while the server is down, are in process.
2. As many have discovered, unicorn allows a circulation person to check out an item to 2 people at the same time. The Implementation Team asked that this feature be disabled. Sirsi cannot disable it, but Sirsi insists that any attempt to check out an item to the second person brings up a warning message and requires an override to continue with the circulation transaction.
3. Please alert your circulation staffs about not overriding and allowing an item to be checked out to 2 people at the same time.
4. As a last resort, Sirsi can disable the operator privilege to complete this dual check out, but this would have to be done for every override in the system--a daunting task.
5. The FULL override has been disabled.

### BIBLIOGRAPHIC REPORTS

1. There are no limits to the number of titles in a bibliographic report.
2. There are limits on the number of search terms that can be used in a single search, but Sirsi couldn't give us the exact number during the meeting .
3. Separate searches cannot be merged into one report.
4. Sirsi suggests that, if we need to merge searches, that we change the path of the report output to Excel and try to sort using Excel. Upon reflection, I wonder if Access might not be better because we could sort and not separate the sort field from the rest of the bibliographic information.

### MISCELLANEOUS ITEMS

1. The Serials Subcommittee will meet Thursday, 8-31, at Wake. They will share the minutes with everyone.
2. Sirsi will report to the libraries when Materials Booking is ready for use.
3. Ruth has a report from Sirsi about bills and billing problems. It runs to 1600 pages. When she determines how to subdivide it, she'll get it to us.
4. The Implementation Team will meet again on Tuesday, 9-5, at 3:00. Please send me any issues you'd like added to the agenda.