CCLINC Implementation Team
Minutes of Meeting, 2 August 2000 (2:00 - 4:00)
Telephone conference call
Unapproved, but we wanted to get you the information ASAP.

PRESENT:
<u>From the CCLINC libraries</u>
Luella Teuton, Chair, CCLINC Steering Committee (Sandhills)
Gretchen Bell, Chair, CCLINC Training committee (Piedmont)
Lorraine Krichko (Wake)
Linda Leighty (Pitt)
Debbie Luck (Randolph)
Raye Oldham (Sandhills)
Martha Robinson (for Angela Sox, Gaston)
Linda Stone (Central Carolina)
Dan Swartout (Edgecombe)
John Wood (Rockingham)

<u>From NCCCS</u>
Pam Doyle
Ruth Bryan
Roxanne Davenport

<u>From sirsi</u>
Eric Cohen, CCLINC system Administrator
Mary Wood, Implementation Liaison

AGENDA ITEMS

TIME CRUNCH

1. Because fall semester will begin in less than two weeks, because of the unfortunate delay caused by the 200,000 missing records, because of additional database problems, because of computer configuration problems, etc., etc., the Implementation Team strongly **recommends and implores** that sirsi delegate additional staff to getting the CCLINC libraries up and running.
2. The Implementation Team identified these priorities for working on the system:
   <u>FIRST PRIORITY</u>: setting up individual staff logins [**NOTE**: Eric reported that 98% (all but the new colleges) had been completed as of 11:25 a.m. on 8-3.]
   <u>SECOND PRIORITY</u>: setting up overdue notices for the individual libraries [**NOTE 1**: All directors received a questionnaire to complete and return to Eric. Please ignore the last question. ALL OVERDUE NOTICE TEXT WILL BE THE SAME FOR ALL LIBRARIES. **NOTE 2**: The questionnaire omitted two important questions, namely, whether the library uses mailers, and whether the library plans to send notices via email. **NOTE 3**: If you like the wording for any of the notices, you will have the option to use it on all of your notices. **NOTE 4**: The Implementation Team is reviewing the text for overdue notices. We've asked sirsi to also provide us with the text for "billing" notices to determine if we want to use some of those. **NOTE 5**: Sirsi is preparing a questionnaire about what other kinds of reports we'll need.]
   <u>THIRD PRIORITY</u>: setting up individual WebCat screens so that the default search will be the local library. [**NOTE 1**: Ruth reports that these screens will be in place early Monday morning, 8-7. **NOTE 2**: Because the libraries decided to enable the REQUEST button on August 15, the local libraries will need to decide which of the possible requests they want enabled at their library. See the addendum at the end of the minutes for additional information. **NOTE 3**: Included in priority 3 is providing all libraries access to whatever reports they'll need to use the "place immediate holds" requests and also brief instructions about how to use this feature since it was not included in our training.]
   <u>FOURTH PRIORITY</u>: restoring missing data, including bib, holdings, and patron records or the parts of any of these that are missing. See alerts below for additional information about missing data.

<u>FIFTH PRIORITY</u>: responding to helpdesk questions <u>other than</u> priority 1 issues. [**NOTE**: Sirsi requests that (until the time crunch is over) CCLINC libraries limit their helpdesk questions to those that are absolutely essential and that are not identified in these priorities.] Please remember that your CCLINC colleagues are also information resources.

ALERTS (These are items you especially need to be aware of)

GroupWise mailing lists
1.   The address CC CCLINC in the GroupWise address book has been disabled. The CC DAC is enabled. Please check with your campus GroupWise administrator to be sure that all the library staff are subscribed to LL DAC at your college.
2.   Sirsi will continue to route messages for all libraries through NCCCS. In turn, NCCCS will route these messages and others pertaining to the operation of CCLINC to <u>both</u> the library directors and also the local library system administrators.
3.   NCCCS will rename the personal mailing list previously named "CCLINC," which really includes only library directors, because the name is misleading.

Missing records/data
1.   Sirsi is still doing some data cleanup.
2.   The data, including holdings records, for large reference sets, especially those with open entries, is missing. Missing titles include, but are not limited to, the following:
   - United States Code annotated
   - Contemporary authors
   - Nineteenth Century literary criticism
   - Twentieth Century literary criticism
   - Contemporary literature criticism
   - Corpus Juris Secundum
3.   A large percentage (estimates vary between 1/3 and 2/3) of the holdings restored to the database no longer have prices in the price field. We think that this problem is confined to those records that were added. If anyone has evidence that the original set of records also have missing prices, please let Ruth Bryan know. Sirsi is checking to see if they can do anything to fix this situation.
4.   Some "fast adds" done in May are missing.

Dynix records
1.   When records entered from the old Dynix template as "Dynix records" migrated, the author ended up in subfield "c" of the 245 tag. This is a legitimate place for the author, but having the author in this subfield can cause display problems.
2.   Examples:

Personal Author: Oxenbury, Helen.
            Title: Tom and Pippo and the bicycle Helen Oxenbury.

Personal Author: Kimmel, Eric A.
            Title: The old woman and her pig adapted by Eric A. Kimmel ; illustrated by Giora Carmi.

Patron records
1.   When the circulation transactions were reloaded after the missing bib records were restored to the database, some patrons were <u>billed twice</u> for the same fine. If you think this might be the case, when you check a patrons fines, be sure to check "all" to get a bills history.

2. The user category 1 and user category 2 choices are being edited so that all choices for user category 1 will be curriculum codes and all choices for user category 2 will be something other than curriculum codes. [**NOTE 1**: If your library uses these categories <u>and selected one of the ones that's moving</u> from category 1 or category 2, then there is a possibility that there will be data corruption in that user record. **NOTE 2**: The category 1 & 2 editing should be complete by the time you read this.]
3. What happened to patrons who had LOST or MISSING records in Dynix, but their patron records no longer reflects this? For LOST, you can identify the patron by using "item search and display" to find the title. Then, look in the "bills" folder. The patron's name is displayed. Then you can go into the patron record and bill the patron for the item. [**NOTE 1**: Sirsi is looking into the possibility of being able to run lists of LOST and MISSING for each library <u>if the library did not create a list of these items prior to the migration</u>. **NOTE 2**: So far, no one knows how to identify missing items, so if you didn't print out a list, you may be up a creek without a paddle. **NOTE 3**: The link between the patron and the item for lost and missing items has been severed and will need to be manually resored.]
4. Sirsi has identified 23,000 patron records with no barcodes. Most of these are very old records from the days when some of the libraries used a "patron load" interface with the STUDMAST in the Registrars' area. However, some of the libraries did have patrons (chiefly faculty and staff) with no barcodes. An error report is being repaired so that the libraries can review these patron records to determine whether to delete these records or to add them to the system.

<u>OTHER TOPICS OF DISCUSSION</u>

<u>WebCat</u>
1. The search screen for WebCat will be changed Monday morning (8-7-00) at 7:30 a.m. Each library will have a screen with their library listed as the default search library.
2. Once these individual WebCat gateway screens are available for each of the libraries, we can begin to make other customized changes.
3. Each library MUST decide prior to August 15, which buttons under REQUEST buttons they want active.
4. The number of records a patron can "print/capture" will be set to 30. This number was decided previously, but the number has not yet been set in WebCat.
5. Please use this URL when bookmarking or referring a patron to the public catalog:
   <u>www.cclinc.ncccs.cc.nc.us</u>
   The URL using the name "louise" to access WebCat has been disabled.

<u>Locations</u>
1. The Implementation Team deferred a decision on whether to have a location of REPAIR. There is currently a location of BINDERY, but the description of this location is not appropriate for all situations.
2. The Implementation Team did authorize a location of TEMPORARY to be used for "add a title" items so that they can be found later and deleted. Unlike the Dynix system, all "fast adds" live forever in the database until manually deleted. The TEMPORAY location will be shadowed and will allow no holds.

<u>Shadowing items</u>
If an item is shadowed, it does not appear in WebCat, although staff can easily search for the item in WorkFlows. Some items are shadowed because their location is a shadowed location. It is possible, however, for you to shadow an individual item, and you'll probably want to do this for lost and missing items so that the patrons won't think the item is available when it isn't.

<u>Renewals</u>
The Implementation Team reconfirmed that the number of renewals will remain at "1," whether it is renewed online or at the circulation desk. However, circulation staff can override and renew an item more than once.
ADDENDUM:

Users enter request text information and staff enter answers in the "reply text" fields of a request record.

Each type of request has its own set of entries that contain information the library needs to fulfill the request.

Here are the types of requests:

➢ Place Immediate Hold
   This request is the CCLINC holds we're accustomed to. The "place immediate hold" selection creates an actual hold, assuming the item or user is not blocked. The Implementation Team has already decided to enable this request for all libraries.

   Circulation staff can place holds for people from WorkFlows at the circulation desk.

   The User Services choice in WebCat allows patrons to display and cancel hold requests.

➢ Suggestion Box
➢ Questions
➢ Comments
➢ Literature Search
➢ Place Academic Reserve
➢ New Title Purchase
➢ Interlibrary Loan   (refers to interlibrary loans "outside" the CCLINC libraries.)
➢ Change of Address
➢ Requisition Additional Copies