CCLINC Implementation Team
Minutes of Meeting, 7 June 2000 (10:00 - 1:00)
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)
Raye Oldham (Sandhills)
Angela Sox (Gaston)
Linda Stone (Central Carolina)
Dan Swartout (Edgecombe)
John Wood (Rockingham)
<u>From NCCCS</u>
Pam Doyle
Roxanne Davenport
Ruth Bryan
<u>From sirsi</u>
Rita Nunn, CCLINC SA
<u>From sirsi, via speakerphone</u>
Judy Culpepper, Manager, Delivery Department
Susan Wagner, Eastern Sales Manager
Mary Wood, Implementation liaision

ABSENT:
Debbie Luck (Randolph)

AGENDA ITEMS

<u>Communications</u>

1. **EACH LIBRARY MUST LOAD THE SIRSI WORKFLOWS CLIENT ON EACH STAFF STATION**. The software is on the LRS web page. Instructions for downloading it have been sent to each LRC Director.
2. **If you have problems loading the software, please let Rita Nunn know immediately**. Some libraries have had difficulties, and loading the software and connecting to the training module is the only way you'll know about possible difficulties. You'll want everything to run smoothly after July 1.
3. Rita Nunn is "officially" on the job. The **designated local SA** may contact her via GroupWise or by phone (919-733-7051, ext. 620). Rita's office is located near Parks Todd's in the Caswell Building garden level. Ruth has also moved to Parks' side of the hallway.
4. The **designated sirsi contact person at each library (or the designated backup) should be the ONLY person** to communicate directly with Rita Nunn, our new sirsi SA. Please ask your library staff to direct questions through the designated local SA and NOT to attempt to contact Rita themselves.
5. In turn, Rita and the LRS staff will communicate directly with the local SAs about sirsi matters, with copies to the library directors when advisable. Everyone will make every effort to see that the appropriate people are informed in a timely manner about the news and information they need to know.
6. Rita will be saving a copy of questions she receives during the week, and will send the questions and her answers to the CCLINC SAs weekly. Especially in the beginning, when we'll have lots of questions, this process should help us with implementation of the new software.

7. As soon as the LRS website has the necessary security in place to allow restricted access to a special sirsi area, the Q&A pages and other helpful information will be posted there as well.
8. Additions to the local system administrators list sent Tuesday:

GAST-LINC	Nicole Robertson**	Angela Sox
GASTON&&	Angela Sox	Brian Williams**
S-PDMT-E&&	Chris Meister**	Lynn Gambon**
S-PDMT-WB	Chris Meister**	Lynn Gambon**
S-PDMT-WU	Chris Meister**	Lynn Gambon**
SANDHILLS	Luella Teuton	Raye Oldham**

9. The next full meeting of the CCLINC Users Group will be at the Distance Learning conference in New Bern on Thursday, July 13 at 2:15. Rita will attend. Others from sirsi have been invited.
10. The Implementation Team will meet immediately after the CCLINC Users Group meeting.
11. A tentative telephone conference call meeting has also been scheduled for June 27 at 10:00. If you have any items for the agenda of either meeting, please let Luella Teuton know.

Access to sirsi

1. The functions available at a specific workstation depend on who is logged in at that workstation because functions are directly connected to the individual logins.
2. It will be possible, however, to have 2 logins available on the desktop simultaneously.
3. Rita will be sending each college a form on which we'll provide the name and other required information about our staff. Then, for each staff member, we'll indicate on the form the functions we want that staff member authorized to perform.
4. Because the number of local staff is large and the time is short, not all staff may be entered with individual logins before July 1. So that we'll still be able to function, sirsi will provide each college with generic logins.
5. If an individual staff member attempts to execute a function for which that person is not authorized, the system will prompt for an override. The override password will be GLOBAL per module.
6. Sirsi will try to provide us access to the "real thing" a few days prior to July 1. The server is being customized and our records loaded in Huntsville, AL, sirsi's home location. It will be shipped to LRS on July 23.

Training

1. Comments or questions regarding the current training cycle should be sent to Ruth Bryan.
2. Ruth will be sending, to the LRC directors, an updated list of available training dates. Some staff have canceled their reservations, and as a result, some slots have opened.
3. Comments or questions regarding future training should be sent to Gretchen Bell. If we can outline the criteria, sirsi can customize for us any kind of training we need.
4. Because all colleges will be using the Blackboard software for distance education classes, it's possible that we might be able to develop staff training modules using Blackboard. Raye Oldham at Sandhills has some experience with this software.
5. The Implementation Team is also looking into the possibility of developing a library module to be inserted in the distance learning classes being developed at NCCCS and being made available to all the colleges.
6. Linda Stone at Central Carolina is also developing library instruction online, and other libraries may be able to build on what she's done.
7. The implementation team is looking for volunteers for each module who will use the new system and push it to the max. We want to:
➢ identify efficient and easy ways to perform the necessary functions,
➢ learn quickly the possibilities for greater functionality that come with this system,
➢ and identify a core group of people who can serve as additional resources for the rest of us.

If you would like to volunteer, please send your name to Roxanne Davenport.

8. ALL STAFF AT ALL LIBRARIES ARE FREE TO USE THE TRAINING MODULE AND TO PRACTICE THE FUNCTIONS THEY'LL NEED TO PERFORM JULY 1. The changes they make will be wiped out each day when the trainers reset the system so that they'll know what to expect when they begin each day's training.

9. Each library has a copy of the sirsi documentation on CD-ROM. The online help features are available to all staff in the training module. Please make sure that your staff becomes familiar with the online help. Knowing how to find the answer to a question will further prepare us for using the new system more easily.

Specific questions and answers, etc.

1. GENERAL FUNCTIONALITY:
➢ Remember that it will take us some time to become really familiar with which features we like, which we don't like, and which can be changed. Sirsi has asked us to use the system with its delivered defaults in the beginning. The Implementation Team has asked for a list of defaults, including which are global and which local.
➢ The Implementation Team has already requested that some of the defaults be changed to better meet our needs. For example, the search/sort limit will be set to 2000.
➢ Apparently, doing almost anything in batch mode is difficult in sirsi. The Implementation Team will be working with Rita and other sirsi staff to determine what is possible and whether there's an equivalent to CIV. Learning how to manipulate records in batch mode requires additional specialized training.
➢ The search screen that we see in training is the default screen. It includes such buttons as "Find it fast," and "Just for kids" because some of the community colleges serve as official public libraries during certain hours. These buttons are part of the public library reference features. The search screen your patrons will see can be designed by you, so if you object to these buttons, you'll be able to remove them.
➢ Sirsi recommends that we take a look at the UVA search screen:
  http://www.uva.edu/lib.html

➢ Sirsi also recommends that we look at the Ball State University screen:
  http://www.bsu.edu/library/indexjs.html

2. HOLDS:
➢ The tentative date for resuming holds is August 1.
➢ Holds will work the same way that they do now [Patrons place holds through the "request" function; Libraries run the "equivalent of" RHA, etc]. The Implementation Team decided to allow "automatic" holds. Some trainers are telling staff about a holds' review process prior to the holds becoming active. We will not be using this review feature.
3. HOLDINGS:
➢ Access to an individual library's holdings records is restricted to staff at that specific library. We will not be able to modify any record that doesn't belong to us.
➢ **VERY IMPORTANT!!!!!** In Dynix, when we delete a record, the record is automatically moved to the DISCARD.HOLDINGS file, and we can later go in this file to extract information we need for the IPEDS and other reports. **In sirsi, when you delete a record, it's gone!** Solution: Do not delete (remove) records you'll need later. Instead, move their location to DELETEME. This location will be a shadow location [Records won't appear in the public catalog.] Then, we can use this fail in a manner similar to the way we currently use DISCARD.HOLDINGS.
➢ Staff will be prompted for an override password to **remove** a record so that they can be absolutely sure that's what they want to do.
4. PATRONS:
➢ We **will** be using PINs.

- When you register a patron (or when the patron file is loaded), the system supplies a computer-generated PIN. Tell the patron what this number is. Then, instruct the patron to hasten to a public access terminal and change their PIN to something they choose.
- Patrons **will** be able to renew materials online.
- And, the staff will also be able to renew materials at the circ desk.

5. PUBLIC ACCESS:

- If your library has dedicated PCs for the library catalog, it will be possible to set the browser at these workstations to something called "kiosk mode." In kiosk mode, the patrons will not be able to use the browser for anything other than the public catalog.
- After July 1, Rita will work with the computer staff at any college that would like to implement this kiosk mode feature.
- Students using the public catalog from a remote location will be able to select their library as they login so that they'll see local holdings first.
- The choice of "ascii" as a print/capture option cannot be turned off.
- Search results will appear by publication date order.

6. RESERVES:

- When placing an item on reserve, staff will select loan periods from the list of circ rules already available.