

CCLINC Implementation Team  
Minutes of Meeting, 22 August 2000 (3:00 - 4:45)  
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)  
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

ABSENT:

Gretchen Bell, Chair, CCLINC Training Subcommittee (Piedmont)  
Angela Sox (Gaston)  
Linda Stone, CCLINC Acquisitions Subcommittee (Central Carolina)

AGENDA ITEMS

CORRECTIONS TO THE MINUTES FROM THE CCLINC USERS GROUP MEETING, 7 AUGUST, ALAMANCE COMMUNITY COLLEGE

Please add these colleges to the list of colleges represented at the meeting:

Blue Ridge  
Southwestern

The addition of these colleges brings the total number of CCLINC colleges with representatives at this meeting to 36.

I. \*\*\*\*\*HOLDS\*\*\*\*\*

1. When sirsi activated the requests buttons each college chose, "place immediate hold" was also activated. The holds function has been working since sometime last week.
2. Sirsi will provide a workflow listing the steps for handling holds. Reports needed for the holds function, and all other reports the libraries need, can be run by each library **as needed**.
3. The Implementation Team made the following decisions:
  - a) Holds will be active at all CCLINC libraries.
  - b) Patrons will be able to place holds on all holdable items at the libraries (items both checked out and on the shelf).
  - c) The libraries may choose one of the following:  
\_\_\_\_\_My library wants to share materials with other CCLINC libraries by placing holds at and allowing holds from other colleges.

- \_\_\_\_\_My library wants to restrict holds to just patrons at my library (includes no branches).  
\_\_\_\_\_My library wants to restrict holds to just library patrons at my college (includes all branches).

IF YOUR LIBRARY SELECTS ONE OF THE "RESTRICTED" OPTIONS, PLEASE LET RUTH BRYAN KNOW IMMEDIATELY!

## II. SIRSI report on dataloading, circulation, and patron issues

The following includes excerpts of the sirsi report the Implementation Team reviewed during the meeting, along with decisions made.

### DATA LOADING PROCESS SUMMARY

"The purpose of this report is to review the data loading process for the North Carolina Community College Library System and to identify problems Sirsi knows to be data issues. Sirsi is committed to the success of this project and will outline the steps Sirsi can take to help the North Carolina Community Colleges to correct all of the concerns about the data loading process. There may be some issues discussed below that may require a manual process on the part of the colleges to correct. However, Sirsi will do everything in their power to minimize and help this effort."

### **"Review and possible solutions to data problems that Sirsi is aware of as of August 16, 2000.**

In the section of this report, Sirsi would like to address the different issues that have been reported as problems since the data loading process has been completed. As requested by the customer, we will turn our attention first to the outstanding issues in the circulation and bills for the patrons. Sirsi will also offer solutions or try to supply reports to identify the problem records where it would not be possible to do a batch fix for the problem.

### **CIRCULATION DATA ISSUES**

As for the charge transactions, there were libraries that noticed that some of their items that were checked out on the DAC system are not showing up as checked out on the Sirsi system. After all of the data corrections to the patrons and the search for missing item to this date, Sirsi reloaded the error files from the original circulation load.

**ISSUE #1:** There were still 307 records that could not be charged because the user's barcode could not be found in Unicorn. When the charge transactions were processed, these 307 barcodes could not be found in the user database.

**ISSUE #2:** There were about 80 charge transactions that failed for miscellaneous reasons. For example, the user was blocked or their privileges had expired. Sirsi cannot offer any batch solution to this problem. However, Sirsi can provide a report with these transactions so they can be manually tracked.

**ISSUE #3:** There are still 255 charge transactions that cannot be processed because of item's barcode still doesn't exist in the Unicorn databases. If these missing items can be recovered with another export, Sirsi can try to run this file of transactions through again. However, Sirsi would suggest that we supply the Colleges a report that contains these 255 transactions so they can at least have a record of the charges.

**ISSUE #4:** There were 560 charge transactions that failed because they contain a library policy of "ASHEVILLE". Sirsi was instructed to ignore these charges."

**FOR ISSUES 1-4, SIRSI WILL PROVIDE A LIST TO THE LIBRARIES (via Ruth) OF THE RECORDS INVOLVED. THE LIBRARIES CAN ACT UPON THIS INFORMATION AS THEY CHOOSE.**

**ISSUE #5:** Deborah Luck at Randolph reported that they had a patron with a charge transaction that was lost during the migration. Sirsi researched all data files received and only found the following bill transactions for this user. Sirsi was not able to find a charge/circulation transaction in the data received.  
**The implementation team instructed sirsi to drop issue 5.**

## **BILL DATA ISSUES**

**ISSUE #1:** There are patrons that had bill transactions that are still not showing up in the Unicorn system as fines for the users. There are two different reasons that caused these transactions to not load. First, the bill transactions contained an item barcode that did not exist in the Unicorn Item Database. Second, the bill transaction could have contained a user barcode that did not exist in the Unicorn User Database.

**ISSUE #2:** Some of the libraries have reported duplicate bills showing up on their screen for a given user. For example, a user may have two bills for the same book. This happens when the transaction was in the bill file with a reason of "OVERDUE FINES," and there was a record in the CIRCULATION file as well that created a charge in the Unicorn System, creating another bill based on the due date of July 7, 2000 (20000711).

**FOR ISSUES 1-2, SIRSI WILL PROVIDE A LIST TO THE LIBRARIES (via Ruth) OF THE RECORDS INVOLVED. THE LIBRARIES CAN ACT UPON THIS INFORMATION AS THEY CHOOSE.**

**"ISSUE #3:** The libraries are concerned about the item having a bill reason of LOST and the corresponding item not reflecting this information. Bob Schenck at the College of Albemarle expressed this concern as well as many other libraries.

**Solution:** Sirsi will select all bills with a bill reason of "LOST" and export the item id from the bill database. Sirsi will use the item id exported from the bill's database and change the item's current location in the Unicorn system to a shadowed location of "LOST". This will place the edited items in the shadowed catalog so that they do not appear to the patron while searching. Sirsi will then repeat the same procedure for the bills with a bill reason of "MISSING".

**The Implementation Team accepted sirsi's solution for issue 3. Sirsi will also send a list to the libraries of all the records affected.**

**"ISSUE #4:** The Southeastern Community College Library was concerned because all bills had a date billed of "July 5, 2000". This was the data that Sirsi did the batch load of bills into the Unicorn System. The Dynix export (purf.out) did not contain the date the bill was created in the old system. Therefore, Sirsi had to load the field with a default value." [Provided for information only.]

## **PATRON DATA ISSUES:**

**"ISSUE #1:** The Southeastern Community College reported they had patrons which were missing their Social Security Number. Sirsi reviewed the data extract and was unable to find this number in the data extraction.

**ISSUE #2:** Deborah Luck at Randolph reported that they were missing a patron record for Derek Ryan Neilson. Sirsi searched back through the data exports and was only able to find the following patron records with a name of Neilson.

**ISSUE #3:** The Randolph library stated that there were to be 248 user records that had a patron note of "NCLIVE PASSWORD". Below is a record that was used as a sample. Sirsi search the entire data extraction and was unable to find the string "NCLIVE PASSWORD" in any of the records."

**The Implementation Team, because registration has passed and libraries have made changes to patron issues as needed, instructed sirsi to drop patron data issues 1-3.**

### **III. CLARIFICATION ABOUT NOTES AND COMMENTS**

Any NOTES or COMMENTS in the extended information folder in the patron record **will not appear** to the patrons when those patrons use "User Services" in WebCat to access their records. If there is information in a NOTES or COMMENTS field, then the red alert about NOTES or COMMENTS will appear in the upper left corner when you access a patron record. Staff can use these fields differently if they choose to do so, but they will need to define how they are going to use them in their libraries.

### **IV. STANDALONE**

Eric reports that the "Standalone" feature of circulation is ready. We will be receiving information about how to use it. Standalone allows the libraries to continue to check out materials when the production server (Louise) is down.

## V. PRICES

In answer to the question posed (Could the Implementation Team please let the libraries know exactly which missing data elements cannot be recovered (see Pam's memo) so that we can begin gathering and re-entering the missing data?) , the Implementation Team could identify only prices as a data element that needs to be re-entered. **Sirsi will provide the libraries with a list of items with no price.** The list will include the call number (so that a staff member could go to the shelves and note the price on the book's jacket) and also the item barcode. Library staff can then re-enter the price in the item record.

## VI. PROCESSES IN UNICORN NEEDING MORE STEPS THAN THE SAME PROCESS IN DYNIX

In answer to the question posed (Could the Implementation Team please develop a list of those procedures in unicorn that are manual data entries but that were automatic in Dynix?), the Implementation Team and sirsi began discussing two issues:

### 1. changing locations for a group of items

Examples would be changing the location for a group of books in a collection that move from branch to branch or changing the location of a group of books to the display case. Sirsi will be providing us with instructions on how to change the location for a group of items.

### 2. renewing patron expiration dates

For libraries that use expiration dates for students, sirsi suggested we use a special circulation cut-off date, such as the end of the semester, that would be unlinked to the expiration date. As the Implementation Team discussed this option, we concluded that the solution would not work because we have too many different calendars and different procedures at the individual libraries.

## VII. SMARTPORT

PITT has been added to the list of libraries testing Smartport.

## VIII. GLOBAL DELETES

If your library was included on the distributed list of global deletes, let sirsi know which records you want to retain in the database.

## IX. BEAUFORT AS A DEFAULT LIBRARY

For staff who have not set and saved their properties in WorkFlows, sirsi will set NCCCS as the default library so that BEAUFORT won't have records added that they do not own. Roxanne will regularly review the holdings of the NCCCS library and will decide what to do with any records that end up there by mistake.

THE MEETING ADJOURNED BECAUSE WE RAN OUT OF TIME. ANY ISSUES NOT DISCUSSED, OR DISCUSSED BRIEFLY, WILL BE ON THE AGENDA FOR NEXT TUESDAY. IN ADDITION, THE IMPLEMENTATION TEAM WILL REVIEW A SIRSI REPORT ON BIBLIOGRAPHIC AND ITEM RECORDS.