

**CLC Committee Meeting Minutes**  
**Chesnutt Library, Fayetteville State University**  
**October 8, 2008**  
**9:00 a.m. – 3:00 p.m.**

Present:

FSU: Evelyn Council, Vera Hooks, Matt Lawson, Velappan Velappan and Jan Whitfield

UNC-P: June Power, Jean Sexton and Rob Wolf

UNC-W: Sue Cody, Arlene Hanerfeld and Dan Pfohl

The meeting began at 9:30 a.m.

**1. Maintenance Split**

- a. Proposal agreed to by library directors September 2008**
- b. Payments for this year: Innovative will invoice each library as usual. UNC-W will invoice FSU and UNC-P. Where we are at on payments.**
- c. Invoicing/payments for next year. Dan will coordinate with Innovative.**

Dan expressed thanks for the library directors agreeing to help with maintenance costs. The UNC-W Business Office had a small problem with the way the maintenance fee was paid. They will be cutting a check for the payment next week, by Wednesday and then UNC-W will invoice UNC-P and FSU during the next week. Next year, Dan will get the invoice and UNC-W will pay it and invoice UNC-P and FSU.

**3. Chris Holley's Visit**

- a. New Innovative regional sales rep. Visited UNC-W August 13, 2008**
- b. Subsequent interactions.**

UNC-W people met with Chris Holley. He wants to make sure the modules are working and he is interested in more than just sales. Dan feels he can call on him. Susan Conboy is a sales rep. for electronic services with a good technical background. Dan submitted a summary of the meeting that was held on August 18, 2008 with Chris Holley.

**4. III's Book Content Service (Content Café)**

- a. Can be seen on the staging directory (<http://uncl.coast.uncwil.edu:2082/>).**
- b. Syndetics functionality, especially CDs, DVDs without ISBNs.**
- c. More content than Syndetics?**
- d. Price comparison.**
- e. Functionality, especially dvd, cd titles.**
- f. Logistics of changing.**

Content Café is a Baker and Taylor product but Innovative is selling it. Aaron Blazer sent an estimate of the costs. This would be cheaper for UNC-W. Paying approximately \$3,167.00 for Syndetics and would pay approximately \$2,180.00 for Content Café. UNC-P approximately \$2,000.00 with Syndetics and would be approximately \$1,150.00 for Content Café, for FSU, paying approximately \$2,250.00 with Syndetics and would be approximately \$1,250.00 for Content Café. III has not been able to resolve the problems with Syndetics. UNC-W is experiencing a problem with their DVD information through Syndetics. We have had Syndetics, a Bowker product, for a year and the only information that is present appears to be only for DVDs that have an ISBN number. The 024 field or the OCLC number is supposed to be used to find a match if there is no ISBN. It is not working well for CDs and appears to supply primarily covers. Content Café has scanned DVD covers and in some cases the images reflect the shrink wrap and therefore appear blurry. There is a strong desire to get Syndetics working. *New*

*York Times* book reviews, *Library Journal*, *Publisher's Weekly*, *Choice* and *School Library Journal* reviews are there with minimal content. Content Café has *Booklist*, *Publisher's Weekly*, and *School Library Journal*. Today was the last day of the month long trial with Content Café. Syndetics had to be set up in the Web Bridge environment and the same would be true of Content Café. Problems with navigation in Content Café were pointed out. Syndetics is owned by Bowker, who also owns *Books In Print* and assigns ISBNs. DVD summaries are provided in the 520 MARC field. Dan said that the use of "Regular Expressions" was needed and he needed to contact Syndetics about it. He said both companies indicated that it should work. Renewal is coming up for Syndetics on December 1, 2008. There was an agreement to continue with it and see if Syndetics can work properly.

## **5. Training New Staff**

- a. Circulation, Cataloging, Serials, Government Documents, etc.**
- b. Who is responsible?**
- c. Where is training provided?**

Dan wants to be sure that new staff know what they are doing before he grants permissions. He does not have any standard training in place, so he wants to know what the schools are doing with training. Jean indicated that when she had a new cataloger, she sat down with her and to see what she was doing, and she trained her step-by-step. June indicated that she had a new Circulation person that she has trained. June lets them do it on their own and come to her if they need her. Rob also indicated that he does training with his staff. June also has a step-by-step manual in place. Ms. Council said that the new acquisitions person was trained on the acquisitions module and vendor records. Dan raised the question of whether to throw money at Innovative for training, train in-house; or get training from the III community. Matt wants to make Camtasia videos. Arlene mentioned the CS Direct Site where the training manual is located and there are other training resources, user guides, reference materials and manuals. Dan wants to know where the needs are since there are second and third generation staff that have had training. The 2007 release is not up yet. Dan has not yet turned the global update on. Dan said he could put together some training issues. Arlene said to send the link to the training guides. They look like the manual but are in Word, so they can be modified for training and for customizing.

A question came up regarding authorizations being shared, and who is in certain positions at the different libraries. The question came up as to who is in cataloging at FSU since Lewis Trott is deployed. Matt specified that he, Jackie Harris and Alice Smith are in cataloging. Arlene asked who was she to contact and Mrs. Council said that Matt was the person. It was mentioned that Lewis' email probably needed to be accessed because there would certainly be issues on it from UNC-W.

Dan asked that training needs be identified. We should survey the staff and then send the information to him. Arlene said that the person who needs the training should go to the school where the trainer is located. Dan said that sometimes it works better if the trainer goes into that person's work environment. June is developing a Blackboard course on training. There is a consortium training aspect that needs to be addressed because of the shared patrons, shared catalogs, etc. Dan expressed an interest in seeing what June is doing.

## **6. ERM, CASE, WebBridge**

- a. Progress Report**
- b. Next Steps**
- c. III Training Opportunities**

The question was asked of Fayetteville and Pembroke what they see as the future for them since they use Journal Finder. Rob wants to migrate over to CASE. Feelings are mixed because they do some things better and other things not so well. CASE is not easily customized; headers are limited, it is a new product. There is help at the bottom of the page. Over time there should be improvements. Journal Finder is low maintenance, and when there are errors, there is a slow response time on updating. Ms.

Council looked at CASE, she liked some of the features, the subject guides. She wants to keep Journal Finder and EBSCO's product.

Dan mentioned that CASE's A-Z list is an off-shoot. June said that patrons would have to go through CASE to get ERM populated. There needs to be a good grasp of what subscriptions are owned, and the ability to point at a list and the titles are downloadable within a shot, without a lot of trouble in getting downloaded. Dan is willing to sit down and show us what the pieces are. Most of CASE is on their server and not the local millennium server. The A-Z list functions off of CASE profile on CASE server. In ERM coverage, edit shows all databases loaded including ones done before CASE (ex. JSTOR, EBSCO, CINAHL). One can see all the titles in the databases, and coverage can be edited. Rob asked about scoping. There are four separate databases. The login determines what database is accessed. The login determines the profile. It would cost more money, but it would be a huge amount of work to coordinate all holdings. CASE would download into an XML file.

There are about 27,843 items in UNC-W's profile. This is a list of what they subscribe to. There is flexibility, you can go in and select titles paying for or subscribing to. They did packages where they are getting everything. The master files are updated once a month. Once something is active in the profile, you will get notified. You have to know which packages you have and are subscribing to. Dan has already set this up for everybody. If you click on request, an email will say files available. When the file is loaded, you can load a single vendor. You can then load file and make link usable. If there is no match, then a brief bib record will be created. Guidelines are in place, set by Rebecca at UNC-W to determine what happens. If there is an embargo, there will automatically be calculated and show how all pieces are working together. Most of the errors can be fixed. It was a lot of work to get this set up. They may have staff go in and load records not found. Dan is going to re-index it next week. Error reports would show those titles that were dropped - the bib records would still have to be deleted for the titles that were dropped, and would need to check the last time the item was updated and then it could be deleted. A project that needs to be done in the catalog is to run a create lists to identify records that would need to be deleted.

Somewhere down the road, WebBridge will be addressed. Dan will contact everyone in the near future to get it jump-started.

## **7. Password Security Settings**

- a. Manual 107537**
- b. Implement new features?**
- c. Time to change logins/authorization passwords?**

There needs to be better system security with regard to logins and passwords. Dan feels that system security could be greatly improved – people who have been gone for years should not be able to still access the system years later. He would like to institute an annual or bi-annual change of passwords and logins. He worked with Cindy to get UNC-P changed. Dan will go through and review which settings make sense.

## **8. UNCW Loan Rule Changes**

- a. Intra-consortium borrowing – UNCW's loan rules**
- b. Loan rule adjustments – preparation**
- c. Consortium fines – that is fines and fees charged by one library against patrons from the other consortium libraries. Specifically, the Replace Process Fee and Replace Bill Service Fee**

Dan thinks that we are all unified with a 28 days loan period. We all charge the same, no fines or fees. Processing fees are \$15.00 non-refundable.

## 9. Review of FSU and UNCP Loan Rule Changes

- a. **Changes to be completed/adjusted? UNCP's requests.**
- b. **Retired UNCP Loan Rules – can these be designated as “Available?”**

There are block tables and loan rules. Give Dan any adjustments to the loan rules. Think of the different scenarios that might occur. Dan would like to know the loan rules we are not using and he will get rid of these settings. The rule selection table needs to be examined. He will make them inactive, but we have to be sure no material is checked out under that rule. Faculty should renew under the old loan rule. The only way to retire a loan rule is to make sure nothing is checked out under it. We have to deal with replacements. If fines are not paid by now, we need to forgive and delete.

June said yes, to make changes. Dan will try to do this tomorrow. Dan is also doing the same for the CMC. Jean says the CMC materials will be entered into the catalog. June said that she did not know about this, and that loan rules may have to be created.

## 10. WebPAC Pro

- a. **“Forgot Your PIN?” has been implemented. Feedback?**
- b. **WebPAC icons – [http://www.nova.edu/library/mayz/iug\\_icons.html](http://www.nova.edu/library/mayz/iug_icons.html)**
- c. **Enable 856 links to open in new window**
  - i. **Edited the DISPLAY\_856 web option to be “z3|true”. The second segment turns on the option to display links in a new window.**
- d. **Enable Syndetic content to open in a new window**
  - i. **I also enabled the Syndetic “pop-up” option so added WebPAC content opens in a new window. When I tried adding the “pop-up” instruction to the Syndetics link, the functionality broke and the links would not load correctly. Use Syndetics navigation.**
- e. **Customize patronview\_web.html to show zero checkout, zero holds.**
  - i. **Turned on in the staging directory (<https://uncclc.coast.uncwil.edu:444/patroninfo>).**

Everyone noticed and seemed pleased with the “Forgot Your PIN?” link.

Regarding WebPAC icons, Arlene felt that there needed to be one for non-music recordings, something in 06 or 07 field. Record for an audiobook – this has to be changed when coming from OCLC. Change item and bib record at same time. Do we want to revisit the icon set? Yes, because the text is with the icon now. Dan will take another look at this and how things are coded. May use 80% - 90% of icons and figure out the rest. Could identify records and globally change them. Everyone felt that this was a worthwhile project to work on. Was there an icon for curriculum materials was raised. Dan said that he would look at this and maybe we could work together on some of these issues.

Folks felt that we should enable Syndetics to open in another window. Matt asked whether this would be a pop-up, and that he would get back to Dan if it was a problem. In using WebPAC Pro, the Syndetics link broke in the new window. Dan said that he could customize the patron view to show zero checkouts and zero holds. Dan will turn this feature on. He got positive feedback. Dan fixed the justifications in the box displays. Dan will make this fix show up everywhere.

## 11. Cataloging Issues

- a. **Duplicate OCLC records are being added to the database.**
  - i. **Different ACQ and CAT procedures allow duplicate OCLC records to enter the database.**
  - ii. **Clean up duplicates**
- b. **Bibs with MARC 856 fields that have info specific to FSU and/or UNCP holdings**
- c. **Location codes for online resources**
- d. **MARC 665 genre heading index project update**
- e. **Quality control issues and plans**

Debbie Packer sends out duplicate OCLC records UNCP is putting in brief records at point of order. UNCW does not want to use brief records. They want full record at point of order. What they are ordering and what they receive are different. Jean says they are not dealing with it. The ones from spring 2008 are not fixed. There will be problems if it is not addressed and records will be harder to find.

Rob ran a list a few weeks ago on the records with the 856 field. FSU still needs to do this. The link resolver could be used to do this. Arlene will email Rob or Matt depending.

To index the 655, the genre heading field is going to cost \$2,300.00. Can or should this be added to the existing request to re-index the Standard Number Index (i)? This cost could be split between UNCW, UNCP and FSU. Debbie will pick a record to use with the best cataloging.

There are quality control issues that need to be discussed. Who is the person to contact concerning cataloging issues at FSU since our cataloger has been deployed for months. Matt is the person to contact for cataloging.

## 12. Other Topics

- a. **Ecommerce**
- b. **Individual requests/problems from institutions**
- c. **Bib Record Tracking, Manual, 107448. Request to implement has been submitted. Does not work. Sent to Software Engineering.**
- d. **Times for running large processes such as Global Updates**
- e. **Distributing information to staff at FSU and UNCP**
- f. **UNC Resource Sharing Project Update**

Dan spoke with Chris Holly about the Ecommerce feature, does not think we should work with it now. It would allow students to pay fines by credit card. Currently Banner and the III system are not be able to talk. June indicated that they are doing everything through Banner now. Dan says that they download the file and send it to the cashier's office. FSU goes into the Banner system to place holds on accounts and block students from reregistering or obtaining their transcript. A banking relationship would be needed to handle the credit card payments.

The point of contact regarding individual requests and for handling problems is Rob for UNCP and Matt for FSU. Ms. Council wanted to know what she needed to ask Mr. Wynn for regarding consortium requests. Dan said the re-indexing at a cost of \$2,300.00. Dan will compute this by using each school's FTE and letting them know their individual payment cost.

One issue that was brought up concerned keyword searching the same keywords twice. The second time, it will say that no entries were found. Dan said to call him with examples. There appears to be no rhyme or reason to it. It is an open issue. Bib record tracking – someone needs to be identified and what caveats to use in dealing with the records. The serials record 222 field is being overlaid and the 222 field is being left out. It is doing this overnight. There are cataloging issues. Arlene will send Jean a file of bib records that she has compiled. Jean said they had a gap of a month in being current on cataloging and that now this is down to days. There was a discussion of the location codes. C was for online resources. Jean said that CI was scoped to all three locations and it meant an Internet item. She said that it had been applied inconsistently across the consortium. Jean says that they are still being created. It was thought that a list should be made of the CI location code records and a justification made for keeping them. Electronic theses were mentioned and Ms. Council said that it would be good to see a list of the titles that were in each individual library's catalog. NetLibrary books were also mentioned. There was an error in the location, and they are not showing up in the catalog. Last June's e-books are the last ones showing up.

It was mentioned to try and avoid running Global Updates between 1 p.m. and 6 p.m. Circulation bogs down when this happens. Contact Dan first, as there may be other things going on. Dan runs patron loads every day between 8:00 and 10:00. Dan wants to discourage large create list runs during the day. Set them to run after folks have left. The reclamation project was mentioned and that it still needs to be completed.

The UNC Resource Sharing Project was mentioned. UPS will be used to carry interlibrary loans. Authentication was yet to be worked out. The two ways it affects the consortium is that it is a web-based interface and verification of the patrons and the patron's IP address have not been worked out. The venture will only be as good as the delivery system.

Ms. Council asked about the UNC Resource Sharing Project. There would be an 18% discount with Yankee, but Blackwell countered and gave current users of theirs a break on the cost..

### **13. Next Meeting**

**a. UNCP**

**b. Jan, Feb, Mar?**

The next meeting will be at UNCP in the spring. Dan will send out a meeting call early in the spring.

The meeting adjourned at 1:00 p.m.

Respectfully submitted,

Jan S. Whitfield