

Conifer day
2009-06-16

- 9:00 Development update
- 9:30 OPAC - refresher
- 10:00 Coffee
- 10:15 OPAC – discussion
- 10:45 Staff client – circulation
- 12:00 Lunch!

Agenda - morning

- 12:00 Lunch!
- 1:00 Staff client – cataloguing
- 2:00 Coffee
- 2:15 Documentation, training, support
- 3:00 Reports
- 4:00 Development and support resources
- 4:30 Collapse

Agenda - afternoon

Development update

9:00 - 9:30

- From famine to feast:
 - Art's Excellent Excel Adventures
 - Acquisitions in Evergreen (at last)
- Kevin is busy converting our (J.N. Desmarais) legacy data

Acquisitions

acq-orders.xlsm - Microsoft Excel

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

VendorNote

Line #	Qty	Type	Title	Location	Price	Adjustments	Fund	Line Total	Description
1	1	Firm Order	Tabloid tales : global debates over media standards / edited by Colin Sparks and John	ACQ MON	\$75.00		COMP-MON	\$75.00	Lanham, Md. :Lanham, Md. :

Amount: \$0.00
 1.0165 \$0.00
 0.0000 \$0.00
 + 0.00
 - 0.00
 diff 0.00
 GST
 GST on Shippir

Vendor: PO Number: PO-00004DS *
 PO Date: June 15, 2009 %
 Operator ID: dscott@laurentian.ca
 Ship Via:
 E-mail: dharris@couttsinfo.com
 apetti@couttsinfo.com
 Telephone: 800-263-1686 x.7219

Vendor Code: COUTTS
 P.O. # Prefix: PO-
 P.O. # Suffix: DS
 Currency: CDN
 Coutts Information Services
 P.O. Box 1000
 6900 Kinsmen Court
 Niagara Falls, ON
 L2E 7E7 Canada

Ship To: ACQ MON Place Order
 Bill To: ACQ MON
 Delivery: Print Clear Order

Note to Vendor:

Purchase Order Totals

Sub Total:	\$75.00
Shipping:	\$0.00
Sales Tax:	\$0.00
Other Charges:	\$0.00
Total:	\$75.00

Art's Excel Adventures

1: admin@BR1-boofoo.localhost

File Edit Search Circulation Cataloging Acquisitions Admin (-)

Purchase Orders

Go Back Go Forward Debug

Purchase Order

Total Lineitems 2

Total Encumbered \$80

Total Spent \$0

--Actions--

Line Items	Items	Notes	Price
<input type="checkbox"/> 10 aniversario Ricardo Ray and Bobby Cruz. 198-?, p1975. Vaya Records, loc	Mark Received	Copies(1) Notes(0)	35
<input type="checkbox"/> 12 jazz-class-ics [196-?] Perfect, loc	Mark Received	Copies(1) Notes(0)	45

Evergreen acquisitions

Serials

- Early May 2009:
 - Basic serial holdings display (MFHD captions and enumerations)
- Late May 2009:
 - Serial holdings editing in staff client
 - Serial holdings display scoped by search scope
- Mid-June 2009:
 - Less fragile serial holdings display

Serials progress

Reserves

ENG100: Introduction to English

 [Unit 1](#)

[Show/hide tree](#)

 [Beowulf and other Anglo-Saxon poetry.](#) »

 [Collected poems, 1934-1952](#) »

 [Unit 2](#)

 [Week 1](#)

 [Dogfish Ale 60-Minute IPA, Partial Mash Clone, Half-batch](#) »

 [Brevity: A Journal of Concise Nonfiction](#) »

 [Dot and a Yellow Rose \(jpeg\)](#) »

 [Unit 3](#)

 [Week 2](#)

 [Wikipedia: Beowulf](#) »

 [Utopia](#) »

 [Condorcet : raison et politique](#) »

 [The case of the midnight visitor](#) »

Reserves – course structure

ENG100: Introduction to English

[Top](#) » **Collected poems, 1934-1952**

Title	Collected poems, 1934-1952
Type	Physical Book or Document
Status	■ On order

Additional metadata

Publisher	Dent,
Title	Collected poems, 1934-1952
Date	1952.
Creator	Thomas, Dylan,
MARC	show
Description	7 day loan

Reserves – item lookup

- “Hurry up and wait”
 - SYRUP ready for testing...
 - ... but test server wasn't ready until last week
- Features:
 - Courses structured by units
 - Electronic resources and physical items
 - Direct manipulation by professors or delegates

Development update - reserves

- Serials ETA: already there!
 - Acquisitions ETA: end of June, 2009
 - Reserves ETA: mid-July, 2009
-
- Is it 9:30 yet?

Development update: wrap

OPAC – demo

9:30 - 10:00

- Google has defined how search works:
 - One search box
 - Simple syntax
 - Relevant results
- And expectations for Web applications have evolved too:
 - Every URL should be copy/pastable
 - Integration with other services should be easy
 - Browsers of all kinds should be supported

OPAC principles

- Defaults to a keyword search
 - Keyword index includes anything that appears in a MARC record that has been converted to MODS (obviously, right?)
 - Therefore, MARC fields defined as “local” (9xx, 349, etc) are not indexed
- Search terms are implicitly ANDed
- Exact phrases are “wrapped in quotes”
- Terms can be negated by prefixing a -

OPAC syntax

- URL defines the default search scope:
 - <http://laurentian.concat.ca> = Campus libraries
 - <http://usudbury.concat.ca> = University library
- Scopes defined:
 - Campus libraries = LU campus (minus NOSM)
 - University and partners = Laurentian + HRSRH
 - Everywhere = every Conifer partner
- Why? Helps people find the best resource, not just the resources in one library

OPAC search scope

- *Format and edition grouping* brings together resources with the same author / title (*metarecords*) to simplify search results
 - It usually works nicely (*The Economist*, *Journal of World History*)
 - But sometimes it leads to... *surprising results*
- This is a global default for the system
- There are some bugs in navigating result sets

Format and edition grouping

- Dear old [Margaret Atwood](#) is a good example
- Google Preview:
 - As part of the Google book scanning project, partial or full previews are available for many of the books in our collection
- Enriched content to support user discovery:
 - Syndetic provides book covers, excerpts, reviews, tables of contents, and author biographies

Integration with other services

- Let's not forget:
 - Book bags
 - Shelf browsing
 - HTML catalogue
 - Browser search box integration
 - Skinning (look and feel)

OFOF: Other Fun OPAC Features

Break

(10:00 – 10:15)

To be followed by OPAC discussion...

OPAC discussion

10:15 - 10:45

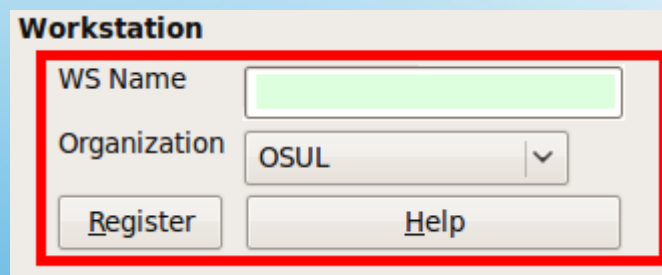
Staff client: circulation

10:45 - 12:00

- Please practice on the test server:
 - **comet.cs.uoguelph.ca**
- This is a snapshot of Conifer from early May, so passwords / permissions / configuration may be a bit wonky
- We plan to update this server with snapshots from production on a regular basis

Staff client – practice site

- Choose the right library shortname!
 - The wrong shortname will lead to all checked-in items being “in transit” to your library



The screenshot shows a web form titled "Workstation". It contains three main fields: "WS Name" with a light green text input box, "Organization" with a dropdown menu currently showing "OSUL", and two buttons at the bottom: "Register" and "Help". A red rectangular border highlights the "WS Name" and "Organization" fields.

- **Tip:** CRC.concat.ca is treated as different from crc.concat.ca, so you can register one workstation at multiple libraries


Workstation registration

- Searching
 - Limit scope to avoid permission warnings
 - All terms are right-truncated
- Click **Refresh** to update display (does not update automatically)
- To apply an action such as **Edit Due Date** to multiple items at once:
 - Click to select the first item, then hold down Shift+Click to select the last item

Circulation – patron basics

- **Check in** tells the system an item has arrived at the circulation desk of the library with which the workstation has been registered
 - From processing, or in transit, or checked out
- After check in, the item will be in **Reshelving** status for a configurable period of time (default: 24 hours)

Circulation - Check in

- Rules are applied based on patron profile, item shelving location, item type, circulation modifier
 - You can change the due date before checking out an item
- 
- Or you can edit the due date on **Items Out** tab (right-click on the item and **Edit Due Date**)
- Rules can be created per library
 - So far, Desmarais mostly uses circ modifiers to determine appropriate circulation rule

Circulation – check out

- By default, the due time for an item is not displayed
- Column picker for check out / items out / item status screens includes a **Due time** column

The screenshot shows a library circulation software interface. At the top, there is a menu bar with options: File, Edit, Search, Circulation, Cataloging, Acquisitions, and Admin (-). Below the menu bar, there are search fields for Patron Search (Patron: Scott, Daniel Brent) and Bib Record (a799551). The main area displays the patron's name, 'Scott, Daniel Brent', in a yellow box. To the right of the name are buttons for Refresh, Check Out (highlighted in blue), Items Out (0), Holds (0/0), Bills (\$ 0.00), Edit, and Messages. Below the name, there is a section for 'Check Out' with a 'Barcode' dropdown, a 'Submit' button, and a 'Normal (U)' dropdown. A table below this section lists items with columns for Barcode, Due Date, Due Time, and Title. The table contains two rows of data. At the bottom of the interface, there are buttons for Print Receipt, Export, Copy to Clipboard, Save Columns, Strict Barcode, Auto-Print, and Done.

Barcode	Due Date	Due Time	Title
30007008072018	2009-06-16	02:18:36	Lap Top Charger
30007008072273	2009-10-13	22:17:41	Lap Top Charger # 7053

Circulation – Due Time

Copy Editor

Templates:

Identification	Location (1)	Circulation (2)	Miscellaneous (3)
Status Available 1 copy	Location/Collection RESERVES 1 copy	Circulate? Yes 1 copy	Alert Message <Unset> 1 copy
Barcode 30007008072117 1 copy	Circulation Library OSUL 1 copy	Holdable? No 1 copy	Deposit? No 1 copy
Creation Date 2007-04-12 1 copy	Owning Lib : Call Number OSUL : 7051 1 copy	Age-based Hold Protection <Unset> 1 copy	Deposit Amount 0.00 1 copy
Creator alamothe@laurentian.ca 1 copy	Copy Number <Unset> 1 copy	Loan Duration Normal 1 copy	Price <Unset> 1 copy
Last Edit Date 2009-06-10 1 copy		Fine Level Normal 1 copy	OPAC Visible? Yes 1 copy
Last Editor cmarcoux@laurentian.ca 1 copy		Circulate as Type <Unset> 1 copy	Reference? No 1 copy
		Circulation Modifier RESERVE 4 HOUR 1 copy	

Editing item attributes

- On the **Copy Editor** screen:
 - Change the attributes that you want to apply
 - Click **Save** and give a name to the template
- To apply a template:
 - Select the named template
 - Click **Apply**
- You can apply templates to many items at once

Item attributes - templates

- **Alternate view** is your friend for title details

Beswick, Kevin D. : 00007001874192

Summary

Bill # 49450	Total Billed 35.00	Title	The long sword and scabbard slide in Asia
Type	Total Paid 0.00	Checked Out	2009-06-15
Start 2009-06-15T22:01:43	Balance Owed 35.00	Due Date	2009-06-18
Finish	Renewal?	Checked In	

...

Item Summary

Barcode: 30007001241974	Location: DESM-CIR	Call Number: U 853 T76 1975	Status:
Circulate: Yes	Reference: No	Holdable: Yes	OPAC Visible:
Created: 2003-06-12	Edited: 2009-06-15	Age Protect:	Total Circulations:

...

Current Bills

Balance Owed	Bill #	Finish	Start	Total Billed	Total Paid	Type	
35.00	49450		2009-06-15	35.00	0.00		

Circulation - bills

Offline client

AKA

Standalone client

AKA

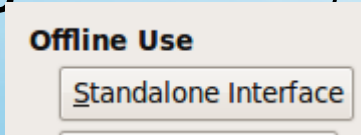
Uh oh

Circulation

- Sometimes, the network goes down
 - Once ...
- Occasionally, the system goes down
 - Twice ... both times my fault
- Old style offline client = paper and pen
 - Ugh.

Offline client

- When you cannot log into the system, or check out items, etc, start the offline client:
 - From the Login screen, click **Standalone Interface**
 - While in offline mode, you can check out, renew, and check in items; you can also register patrons
 - Remember to click **Save these transactions** after entering item transactions



Starting the offline client

- After an outage that necessitates the use of the offline client:
 - Local system administrator creates an offline session for your library
 - All clients reconnect to the network and upload their transactions to that offline session
 - Local system administrator processes the transactions and deals with any exceptions

Uploading offline transactions

Lunch

12:00 - 1:00

Staff client – cataloguing

1:00 - 2:00

- Buckets (for copies and records) enable actions against multiple objects at once
 - Record buckets for mass delete or merge
 - Copy buckets for mass delete, editing attributes, or transferring copies to a different volume (call number)

Buckets

- Each standard MARC21 bibliographic record for a serial that we hold has one or more corresponding MARC Format for Holdings Data (MFHD) records
- Each MFHD is associated with a library
- Holdings for all libraries within the user's search scope are appended to the bibliographic record display
 - For example,
Journal of Sport & Exercise Psychology

How serials holdings work today

- When a bibliographic record is displayed in the staff client, an **Edit** button will appear beside each serial location
- Clicking the **Edit** button invokes the MARC editor
- Fun!

Options

Stack subfields

MARC Record

LDR		00579cy	a22002054	4500
001		37797		
005		20090603132441.0		
008		030807	eng	090313
852		‡b DESMARAIS	‡c DESM-PER	‡h GV 706.4 J68 Per.
853	2	‡8 1	‡a v.	‡b no. ‡u 4 ‡v r ‡i (year)
866		‡a v.10 (1988) - v.30 (2008)		
591		‡a v.13 (1991)		
867		‡a v.21-30 (1999-2008)		
863	1	‡8 1.28	‡a 31	‡b 1 ‡i 2009
863	1	‡8 1.29	‡a 31	‡b 2 ‡i 2009
935		‡a a599967		

Editing serials holdings

- The **MFHD standard** is a must read, but...
 - 852 – location information
 - 853/854/855 – caption and enumeration info for issues/indexes/supplements
 - 863/864/865 – individual issue/index/supplement
 - 866/867/868 – summary holdings statement for issues/indexes/supplements
 - 590* – missing volumes
 - 591* – incomplete volumes

MFHD in a nutshell

- CTRL+UP copies the current field into a new field before your current field
- CTRL+DOWN copies the current field into a new field after your current field
- **BUG:** new or updated records are not always immediately indexed

MARC editor secrets

- We catalogue using MARC, but for purposes of indexing and display, MARC records get turned into MODS:
 - MARC example
 - MODS example
- We can index and display discrete MARC elements, but MODS gets us most of the way there

Cataloguing – MARC vs. MODS

Coffee break

2:00 - 2:15

Documentation, training, support, tickets

2:15 - 3:00

- There are a number of manuals and guides other sites have created and shared
- At the May 2009 Evergreen International Conference, a Documentation Interest Group was formed to work towards a common set of best-of-breed documentation
- We have some Conifer-specific tasks documented on the [Conifer wiki](#)

Documentation

- Dan is capable of limited training (hey, you're here today right?) but also has to enhance the system and be a regular librarian
- Training is available through [Lyrasis](#) in areas such as cataloguing, circulation, acquisitions, system administration and reporting (\$250 US / two-hour course)

Training

- The Conifer discussion list is an excellent place to ask for help; we're all in the same boat
 - You can subscribe at <http://groups.google.ca/group/conifer-discuss>
 - You don't have to receive mail
 - Please report outages here first so we can determine the extent of the problem
- You will also find birds of a feather on the [Evergreen general mailing list](#)

Discussion list

- We track defects, enhancements, and tasks on the Conifer ticket system
 - Local system administrators for each site have the ability to open, view, and own tickets
 - Enables us to prioritize and delegate work, avoid duplication, and determine how similar problems were previously solved
 - Priorities range from **Blocker** (system down - no work can be done!) to **Trivial**
- Currently have 63 tickets out of 123 open

Tickets

- We have signed a 24x7, 1 hour response time support contract with Equinox Software, Inc.
- Our servers are expertly hosted at the University of Guelph
- Each primary partner has one designated contact who coordinates problem reports with Guelph and Equinox
 - At Laurentian, that's Dan Scott and (soon) Kevin Beswick

Support