MONTANA SHARED CATALOG GLOSSARY

API – API stands for application programming interface. Accessed at the application server level of the system architecture, APIs enable staff to perform interactive or automated data input or output to the Unicorn database. All data elements of the integrated system can be retrieved and updated using these tools. SirsiDynix provides documentation, training, and support especially for APIs.

Bill Display Group - A group of libraries that have permission to display each other's user bill records.

Bill Maintenance Group – A group of libraries that have permission to modify each other's user bill records.

C-Client – The older release of Workflows that uses Sirsi's propriety C++ language. The newer version uses the Java Runtime Environment and is referred to as the Java Client. (See Java Client)

Circulation Permission Group - A group of libraries that have permission to circulate each other's materials and to modify each other's circulation information.

Circulation Rule – A system policy that defines how library material circulates including the loan period and fine structure. Rules vary based on the owning library, the Item Type and User Profile. (See Item Type, User Profile and Circulation Map).

Circulation Map – The organization of all the circulation rules in such as way so that the accurate rule is applied based on the Library, Item Type and User Profile.

Current Location – Where an item is currently. If the item is in its standard shelving location, the current location will be the same as the home location. However the current location changes when an item is checked out or is otherwise unavailable.

Development Server - A mirror image of the production server, this server is used as a backup to the Montana Shared Catalog production server, to test load and review data from new libraries and to test new upgrades and application processes.   The Development Server is accessed through the IP address on the initial configuration screen when using Workflows. This IP address is mtscdev.msl.mt.gov.

Enterprise Portal Solution (EPS) – A portal interface for users that will eventually replace iBLink. The portal is designed to synthesize data from libraries' OPACs, databases and websites, etc. This application will be available via any web browser. (See iBLink).

Director's Station – A web-based data mining and analytical tool that can be used to generate reports and statistics that can be presented in tables and charts. Directors Station is updated nightly from the ILS. Reports can be generated on circulation, cataloging,

OPAC usage, etc. Montana Shared Catalog currently has access to 10 concurrent DS seats. Each library has their own login(s) which can be used to generate custom reports.

GL3.xx - New naming convention for Unicorn software releases. The intent is to move away from date-related names such as 2003.1.4.5. GL stands for Global.

HIR (Halt and Run) – A process to briefly halt, initialize and run the servers again. A nightly HIR is required on the production server to implement any policy changes such as new policy names or circulation rules made the previous day. HIRs are also used to resolve certain server-related problems.

Hold Map – A collection of rules based on owning Library, Item Type and User Profiles that determines who may or may not place holds on certain material. This is very similar to Circulation Rules and the Circulation Map.

Hold Permission Group – A group of libraries that have permission to place holds on each other's materials and to modify each other's hold records.

Home Location – a Unicorn policy that refers to where the item resides in the library. Examples of Home Locations include FICTION, NON-FICT, MONTANA, etc. Home locations can be used to identify where an item may be and for statistical analysis.

ILS – An acronym that stands for Integrated Library System. The Montana Shared Catalog uses the Unicorn system as its ILS. (See Unicorn).

Item Categories – Unicorn policies that further denote what an item is. These categories can be used for statistical analysis and user searching and discovery. Examples include MYSTERY, MONTANA, SCI-FI, etc. Each item can have up to two item categories (Item Category 1 and Item Category 2). For items to appear in iBistro's Kids' Library, items must have an Item Category 2 of JUVENILE.

Item Library – the item's owning library as indicated in the Workflows item record

Item Type – A Unicorn policy that refers to what an item is physically. Examples include BOOK, AUDIO-REC, VIDEO-REC, etc. Each item can only have one item type. This policy name is used in conjunction with User Profiles to determine the items circulation rules.

iBistro/iLink (iBLink) – User interface used to access the Montana Shared Catalog online database. This application can be used via any web browser.

Java Client – The newest release of the Workflows staff client. It uses the Java Runtime Environment rather than the proprietary C++ language of the older release of Workflows. (See Workflows and C-Client).

Offline Mode – An option libraries should use when they cannot access the Montana Shared Catalog system. It is accessed in the Java Client by selecting Operate in Offline mode on the initial Workflows Configuration screen and then by going to the Offline toolbar. Limited circulation wizards are available because in Offline mode the workstations are not interacting with the database; instead all transactions are saved to the local workstation. When the workstation next logs in to the system all offline transactions are uploaded to the server for inclusion in the database. (See Standalone).

OPAC – An acronym that stands for Online Public Access Catalog. The Montana Shared Catalog libraries use iBLink as their OPAC. (See iBLink).

Production Server – The server that stores the Montana Shared Catalog Unicorn software and database and in which all the catalog transactions are logged. The Production Server is accessed through the IP address on the initial configuration screen when using Workflows. This IP address is mtscprod.msl.mt.gov.

Rooms – A SirsiDynix portal product that allows libraries to create and customize "rooms" of similar content to provide ready-access to information on specific subjects. Content in Rooms can include links to the catalog, websites, digital content, etc. The Rooms product is now being delivered bundled with EPS.(See EPS).

SirsiDynix – SirsiDynix is the vendor from which produces the Unicorn ILS. In 2002, when the Montana Shared Catalog was formed, Sirsi and Dynix were separate companies. In 2005 Sirsi merged with Dynix to form SirsiDynix.

Standalone – A standalone client used with the C-Client Workflows when libraries cannot access the Montana Shared Catalog system. It is accessed through a separate Standalone client. Limited circulation wizards are available in Standalone because the workstations are not interacting with the database. Instead all transactions are saved to the local workstation. When the workstation next logs in to the system all offline transactions must be uploaded to the server for inclusion in the database. Standalone has become obsolete with the development of the Offline mode in the Java Client.

Station Library – Workstation library where transactions take place. Monthly transaction reports are based on station library counts.

Test Server – See Development Server

Unicorn – Server application that runs the Montana Shared Catalog Integrated Library System. The Unicorn system provides comprehensive ILS functionality with modules for Circulation, Cataloging, Serials, Acquisitions, Outreach, Materials Booking, Reserves, Accountability, Reports, and more.

User Categories – Unicorn policies that provide demographic information about users. This information can be used for statistical analysis. Users can have up to five user

categories (User Category 1, User Category 2, User Category 3, User Category 4, User Category 5). Examples include ADULT, JUVENILE, 1ST GRADE, etc.

User Display Group - A group of libraries that have permission to display each other's user records.

User Library – a user's library as listed in the Workflows user record

User Maintenance Group – A group of libraries that have permission to modify each other's user records.

User Profile - A Unicorn policy that denotes what type of patron a user is. User profiles determine user privileges and can be used for statistical analysis.   Examples include ADULT, JUVENILE, TEMPORARY, STAFF, etc. Each user can only have one User profile. This policy name is used in conjunction with Item Types to determine the patrons' circulation rules.

User Status – Within the Sirsi system there are four user statuses.
- **OK** – the user is circulating materials, returning them on time and has no fines or bills.
- **Delinquent** – the user has at least one item overdue or owes any amount to the library. This status is maintained by the system. Once the issue is resolved the status returns to OK with no staff intervention.
- **Blocked** – the user has reached the overdue or bill threshold set in the User Profile and is automatically blocked by the system. If a blocked user attempts to circulate material staff will be prompted to override this status in order to allow circulation to proceed. Once the issue is resolved the status returns to OK with no futher staff intervention.
- **Barred –** a user status that must be manually set and removed by staff. A user with this status cannot circulate material at all until this status is changed by a staff member.

(See User Profile and User Thresholds).

User Thresholds – Policies that can vary by User Profile and are used to determine users status and are also used in conjunction with the Circulation and Hold Maps to manage circulation. Thresholds include:

- **Billable** – whether or not a patron can be billed
- **Privilege limit** – the period of time after which a user's card must be renewed. A renewal fee may also be specified.
- **Charge limit** – how many items of any type a user may have at any given time.
- **Charges allowed** – how many items of any type a user may circulate before a library card must be renewed.
- **Hold limit** – how many items of any type a user may have on hold at any given time.

- **Overdue threshold** – the number of overdues on a patron's record that automatically changes the User Status to Blocked.
- Bill threshold – the dollar amount owed on a patron's record that automatically changes the User Status to Blocked.

(See User Profile and User Status).

Workflows – Staff client software application that interfaces with the server. This software must be loaded onto each staff workstation.