

New Charge Project

Sirsi Steering Committee

February 2007

In 1998(?) the University Libraries decided to move to a third party integrated library system named Unicorn from Sirsi Corporation. About a year and a half was spent planning and configuring how the system would function. It would be safe to say that at that time little was know about how the system typically functions and best effort decisions were made to configure the system.

Along with decisions on how the system will function, policy decisions were made on “data representation”, such as libraries, locations, item types, etc. In addition, it was decided to proceed with customization of the web interface and creation of custom reports.

Since going live with Unicorn in early 2001, there has been a number of instances and circumstances that raised questions about the appropriateness of those earlier decisions. They worked well in 2001, but, as more experience has been gained with the behavior of Unicorn and some challenges which have arisen, it is appropriate to question whether the original decisions are still appropriate. It is reasonable to explore whether the original decisions can be modified to improve the utilization of Unicorn and provide more benefits for the University Libraries.

In January of 2007, IT Priorities charged “the Sirsi Steering Committee to evaluate the system as it is implemented and to examine implementation decision made six years ago to determine if there are changes that could be made to make the system run more efficiently and effectively and to better meet the needs of the University Libraries.”

A number of topics were mentioned in the charge given to the steering committee. The committee was also asked to “bring forth recommendations along with associated costs estimates by May, 2007.”

Considerations of any possible implementation issues will be dealt with by another project, if there is one.

[The following goal “statement” is intended to serve as a starting point for discussion and development of the formal goal statement. Part of the meeting on Monday is to develop and agreed on the formal goal statement that will be used to guide the project.]

Goal Statement

The Sirsi Steering Committee, with the assistance of the Unicorn expert teams, will produce a report to IT Priorities concerning the feasibility, estimated costs and advisability of modifying the way Unicorn is administered and utilized to improve the overall efficiency and effectiveness of the system.

An understanding of what and why the original implementation decisions were made will be obtained in order to identify what functionalities the implementation teams wanted to have.

Current and envisioned future needs of the library will be identified and documented.

Changes that can help Unicorn to better meet these needs will be identified.

For areas where a change would bring about improved efficiency and effectiveness the types and amounts of costs will be estimated.

It is assumed that there will be no funding for additional resources to help with the project.

The depth of the final report will be determined by the deadline that the report is to be distributed, i.e., May 31, 2007.

[The following list of deliverables is intended to serve as a starting point for discussion and development of the formal list of deliverables. Part of the meeting on Monday is to develop and agreed on the formal list of deliverables that will be used to guide the project.]

List of Deliverable

At the conclusion of the project the following will be delivered.

1. Documentation detailing the major original implementation decisions
 - a. Functionalities desired
 - b. If possible, the reasoning that lead to the decision, and
 - c. Lessons learned, including ongoing costs.

2. Documentation outlining the current and possible future needs of the library that Unicorn can help meet.
 - a. WorkFlows
 - b. iLink
 - c. Reports

3. List of changes, if any, that would have to be made to meet current and future needs
 - a. Policies
 - b. workflow (note the lower case) issues
 - c. Customizations
 - d. Types of cost and the amounts
 - i. Dollars
 - ii. Staff time
 - iii. Lost opportunities
 - iv. Training
 - v. Psychological
 - vi. Others ??
4. Final report and recommendation about the changes
 - a. Feasibility
 - b. Estimated costs
 - c. Advisability
5. So forth and so on ...