

CCLINC Policy for Use of the Label Designer function in the Workflows Java Client

GIVEN the following facts:

- a user must have authorization in the Label Designer wizard in order to use it
- only the Label Designer wizard provides access to the list of available label templates
- in order to print labels, a default template **MUST** be selected from this list
- the choice of default template is made at the **CLIENT** level (local PC)
- the label templates are stored/saved on the **SERVER**, not within the client

THEN the following policies are in effect:

1. All catalogers who have or acquire Smartport authorization will be given authorization in the Label Designer wizard in Thelma automatically. These catalogers will receive such authorization in Louise **only upon request**, since some libraries may elect NOT to print labels from Workflows. All CCLINC libraries should have at least one cataloger who has Smartport authorization, so this policy ensures access to this wizard for each library desiring to print labels from Workflows using the Java client.
2. Creation of potential label templates **MUST** be done in **THELMA**. Once a potential template is created and tested, the creator will petition the Cataloging Subcommittee to review the new template and approve it to be copied over to/re-created in LOUISE.
3. Requests for review of potential label templates should be submitted to the chair of the Cataloging Subcommittee. The Cataloging Subcommittee will work with the requestor to see that the proposed template is as accommodating to multiple users as possible and is named in an appropriate manner. The Cataloging Subcommittee is empowered to approve or deny the request without further confirmation by the Steering Committee. However, denial of a template request may be appealed to the Steering Committee if the requestor is not satisfied with the rationale of the Subcommittee.
4. In order to keep the list of templates from becoming too unwieldy, creation of new label templates should be limited. Label templates should only be created to reflect the different label stocks in use in our system and the presence or absence of desired recurring printable elements.

For example, a template is created for 1 by 1 ½ inch single-spine stock that contains current location and call number as printable elements. All libraries using this stock and desiring these elements should use this same template.

5. Templates should be created with an eye toward accommodating as wide a use as possible while still accomplishing the desired outcome.

For example, enough potential lines should be created in the call number element to accommodate LC numbers (5 to 7), even if the creator is a Dewey user who only needs 3 lines at the most.

6. The name given to each template should reflect the format and size of the label stock. If it becomes necessary to differentiate between similar templates, the name may also include type of printer (ex. laser vs. tractor-feed/dot matrix vs. dymo, etc.) or printable element variance (current location vs. call number only, copy number vs. no copy number, etc.) The name given to a template should make it easy to select an appropriate template from the list.

7. General use of this functionality by the membership will be somewhat analogous to the reports function. Templates exist at the server level. **The user will choose a default label template that is best suited for the local application from among the existing templates.** If the user is not authorized in the Label Designer wizard, the cataloger at the school who IS authorized will select the default template for the user. If no template exists that can accommodate local needs, the local authorized cataloger will construct a potential template on THELMA and submit it for consideration as outlined above. The SIRSI system administrator and members of the Cataloging Subcommittee will make themselves available to help in such design efforts.

8. Users will NOT lock templates. Users will also NOT make ANY changes in existing templates in either server, except as outlined in no. 9 below.

9. Once a template is designed and approved, subsequent users from other libraries may have quibbles about relatively superficial settings such as choice of font and font size. These should be discussed and agreed upon between the users of the template. Every effort must be made to identify all libraries using a template for inclusion in the discussion. Once agreement is reached, any agreed-upon change may be made in the template under discussion in THELMA and submitted to all template users for review. Upon approval by all users, the change(s) may be made in Louise.

10. Major quibbles with choice of label size or printable elements will more than likely require the creation of a new template. However, the Cataloging Subcommittee will NOT approve new templates that are created merely to accommodate transient elements that should be more appropriately handled by editing labels in the print preview gadget.

FURTHER:

It is understood that this functionality is new to the membership, being part of the new java client. As further use is made of this functionality, more complications may develop. In that case, users should notify the Cataloging Subcommittee chair of such complications as soon as possible, and the Subcommittee will revisit these policies for amendment or refinement. Any changes at the policy level will have to be confirmed by the Steering Committee.