

State University Libraries Interest Group
Florida Library Association Annual Conference
Thursday, April 12, 2007
Meeting Notes

Submitted by Ben Walker, University of Florida, SULIG Chair-elect

Part I. SUL Business and Reports

A. Introduction and election of officers

- Called to order by Chair Steve Fuquay at 3:30 PM
- Attendees were greeted and welcomed.
- A sign-up sheet with name-and-email was circulated, and attendees were asked to complete the information. The Chair discussed the importance of accurately collecting this information for FLA to make judgments about programming for the next year.
- Following explanation of the duties of the position for this year and next, nominations were sought for the position of Vice Chair/Chair Elect, with Ernestine Holmes of Florida A&M University volunteering to serve.

B. Technical Services Planning Committee Update - Betsy Simpson, UF, for Cecilia Botero

- Aleph Version 18 Upgrade
 - Group formed to examine Aleph indexes; after all SUL upgrade to Version 18, the indexes will be regenerated
 - Functional testing has started at institutions using the Test clients
 - Training preparations have started
 - FCLA site visits: UF will be first, on April 16; these visits will provide an overview and general information, with functional break-out sessions
 - Communicating via SUL listservs
- NOTIS
 - Committee understands the cost of maintaining NOTIS is prohibitive, but staff are still using
 - The committee is collecting usage data (UF, FSU) and sharing with FCLA
 - Primary concerns:
 - Authority file not up to date; still relying on NOTIS for authority maintenance reports; letter to be sent to CSUL: a workflow for reports is needed
 - Replacement for LTQF not ready yet

- Order record information only available in NOTIS: did not transfer to Aleph, staff are using the free text and payment note lines in the order records
 - Endeca
 - TSPC wants to play an active role and is seeking ways to participate in decision making
 - Continues to monitor the LIBOPAC list and Endeca blog
 - Cecilia Botero requested a representative to the OPAC Subcommittee (Ya'aqov Ziso)
 - Single bib interface to be used across all SUL
 - Recent conference call to discuss pros and cons of using one bib for SUL (following on reports like the University of California system white paper on rethinking bibliographic services)
 - Gathered information from CCLA, but they utilize a much smaller database and a different user base
 - Benefits:
 - Expected improvements with processes to upgrade Aleph client, apply patches, and reindex
 - Centralized authority maintenance lessens demand on individual institutions
 - Greater standardization for metadata creation and revision across SUL
 - Concerns:
 - Major effort requiring thorough analysis of workflows and procedures
 - Effect on record loading unclear
 - Merged local authority file
 - Quality control compromises, e.g., the lowest common denominator. Requires establishing a standard
 - Next steps:
 - Connect with colleagues at ELUNA (like Harvard or Maryland where a single bib is in use)
 - Compile a list of issues
 - Gather input from other SUL groups
- C. Public Services Planning Committee Update - Meg Scharf, UCF, for Rebecca Bichel
- Highlights from the year: Subcommittee Reports
 - **OPAC:** Working on the Endeca Public Interface is in progress; Feedback should be directed to the individual campus representatives
 - **Circ:** Investigating self-check out, which is an option with Aleph Version 18; Planning for 1 (or more) self-check machines for each institution.

- **ILL:** Working with OCLC, the ILL group held the first Florida ILLiad user conference in December; this was 2 days of ILLiad training and a conference; there was also some attendance from outside the state. The ILL group is also considering unmediated borrowing; with Endeca, this may be possible; the system is not yet ready, but the committee is investigating options.
- **Information Literacy:** the committee offered a program this morning at FLA which identifies best practices in the state. They are also investigating cooperative production of tools for use. This is the first year of existence for this group
- **Public Services Planning:** held their first face-to-face meeting, and demonstrated 2nd Life (UCF & USF)
- **Government Documents Summit:** 100 year anniversary of the UF Depository in June; celebration planned in collaboration with the Collection Planning Committee, but the date is not finalized

D. Collection Planning Committee - Melissa Gonzalez, UWF, for Helen Wigersma

- A statewide collection analysis project is underway, utilizing OCLC WorldCat analysis; Psychology, Medicine, Art, & Architecture should be completed in July. This analysis will provide information on the degree of overlap, the uniqueness of the collections, the age of the collections, etc. Based on the outcome of the initial analysis, the committee will make a recommendation to complete other subjects
- This information will provide the SUL with knowledge of collections, which will be useful in legislative talks, while also building on the uniqueness of individual collections and enhance cooperation. Currently, books and ebooks are being considered (scores are not being reviewed yet).
- Recommended the hiring of an Electronic Resources Librarian at FCLA, to deal with multi-institutional licenses. Claire Geiger has been hired for this position.
- Established the Digital Archives Task Force for journals; the task force identified two options for maintaining access to commercial electronic resources: LOCKSS and Portico. Portico was ultimately recommended to CSUL.
- Goals for the year: Institute a study of collection management as it relates to the ARL standards for CSUL; and assessing the impact of ebook purchases on ILL.
- New Task Forces:
 - Collection Statistics: focused on standardizing Aleph reports
 - Law Library Task Force: to establish discussions among law libraries
 - Ebook Task Force: focused on access

- JANUS Issues: focused on collection management concerns, especially as they relate to ARL standards and JANUS digitization & archiving
- E. Electronic Resources Subcommittee - Michelle Newberry, FCLA
 - Established to create and manage shared electronic collections
 - Representatives from SUL, with chair (2 year term) and chair-elect (2 year term)
 - set-up to manage the FCLA Database budget
 - Projected \$400k deficit at the start of 2006; but this amount was reduced to \$300k; group examined methods to reduce that deficit:
 - FCLA will not continue paying for First Search per search blocks after Spring; individual libraries will assume from then on (approximately \$207k)
 - Some of the databases came in under the anticipated amounts (MLA Bibliographies through EBSCO to be paid for by institution)
 - Remainder of the deficit was divided by institution
 - No suitable single source could replace Lexis-Nexis Academic; also the cost of combining different databases to replicate LN Academic exceeded the cost of keeping it. The decision, therefore, is to keep Lexis-Nexis Academic.
 - SOLINET Pilot Project: SOLINET is representing FCLA in negotiation with the University of Chicago Press. If there is no resolution by June, then the new FCLA E-Licensing Librarian will assume the responsibility for continuing negotiations.
 - Valueline-there have been recent access problems and because of this, Valueline extended the license by one month and added Valueline Resource Center at no extra cost
 - ACM Digital Licensing to SOLINET, but no immediate cost savings; by June 2008, there will be a cost reduction because of the size of the consortium
 - There are new titles for Gale Virtual Reference database
 - A new agreement has been reached with Blackwell and Springer
- F. Authorities Subcommittee - Kim Montgomery, UCF, for co-chairs
 - Developed a statewide workshop on authority control: 2.5 days at UCF, November 2nd and 3rd
 - Backloading of authority records from the Library of Congress has been extremely time-consuming, with problems noted in linking authority headings to bibliographic record headings
 - FCLA has completed the loading of backfiles for subject authority records and series authority records; these are now loaded weekly.
 - FCLA is now loading the name files; staff at UF and UNF have worked on the clean up, and their efforts were recognized at the workshop
 - A new proposal for an expedited protocol to clean up these name files was approved, but progress remains slow; FCLA hired a new

staff assistant to work on this project and is optimistic that the loading of these files can be completed by year end

- The subcommittee submitted a report through TSPC describing the continued reliance on NOTIS and urging retention of NOTIS until a current and fully operational authority file is available in Aleph
- The subcommittee is looking forward to Endeca, because any inconsistencies in records will be readily apparent to users, and will provide a stronger argument for the need for a clean and authority-controlled database

G. CAGER Subcommittee - Kim Montgomery, UCF

- Developed a cataloging and access guide for e-resources
- Historically, CAGER has created guidelines and mechanisms for communication.
- Now, using CONSER guidelines
- Creating list for standard for cataloging e-resources
- Held a Metadata Summit (11/15-11/16) to create a mutual understanding of traditional and non-traditional e-resources, to recommend the best options for PALMM Files, and to recommend procedures for continuing education. The following recommendations were made:
 - Need for a digital projects group for communication with CAGER
 - Cataloging should be involved from the start on digitization projects
 - Increase communications laterally with staff at each SUL
 - Use Endeca as the federated search engine
 - Use software at individual institutions for electronic resources
 - Establish best practices for the creation of digital libraries
 - Continue the listserv from the summit
 - CAGER should evolve into a new Metadata group, with additional members

Part II. FCLA Reports

A. FCLA general update

- Aleph Upgrade - Michelle Newberry, FCLA
 - Version 18 upgrade will begin on the weekend of July 14 at UF, UNF, and UWF
 - It will proceed like the original STP, using Circ Backup for transactions
 - System should be up the following Monday, when data will be verified. At that time, all circulation transactions from the weekend will be loaded to Version 18
 - July and August will be used to resolve problems and tweak the system

- Starting in mid-August, FSU, FAMU, and USF will receive the upgrade (approximately the weekend of August 17)
 - In mid-September, FGCU, FAU, and FIU will be upgraded
 - In Mid-October, UCF and NCF will be upgraded
 - All institutions should begin establishing workflows, examining the table settings, and testing of Version 18
 - June 1 is the implementation date for all phase I libraries to practice for the mid-July Aleph change
 - Changes to the OPAC will not migrate (customized Javascript unsupported by Aleph)--yet another reason to push for Endeca
 - No changes to the course reserves yet, but this will be the next project at FCLA
 - Authorities: FCLA will buy new authority records, load them once, and link them against the full authority file. However, the linking cannot be done until after the individual SUL has upgraded to Version 18.
 - Metalib, SFX, and Verde - Elaine Henjum, FCLA
 - Version 4.0 is available, with a general release scheduled soon. FCLA will load 4.0 on Test as soon as possible, but there is no official install date.
 - The main changes are the addition of facets and topics, which provide an additional way of retrieving and accessing data
 - Customizations will need to be recreated, and the help screens will need to be revised
- B. Q & A - Jim Corey, Michele Newberry
- Questions regarding why the Aleph OPAC will not be updated:
 - 30,000 files to maintain, and customization will not survive; FCLA does not have the resources to maintain customizations; the upgrades alone will take four months
 - Why Endeca?
 - Endeca has been proven at North Carolina State University, and NCSU is willing to share their configuration; Endeca features things the SUL wanted, and allows for easy modifications and rapid development
 - Endeca will update in real time, rather than instead of every 24 hours, like at NCSU
 - What about browse searching?
 - The status of this feature is uncertain, mainly because it is very resource intensive
 - There is no inherent browse capability in Endeca (keyword searching only, like Home Depot)
 - NCSU created a browse function by searching their LMS Sirsi through Endeca

- Importance of coordination of authority records, holdings, etc. among SUL
 - Since it is a shared catalog, it is important for items to display similarly across the SUL
 - Some expressed a need for the TSPC to have direct input to FCLA; this will be taken to TSPC for further discussion
- FCLA staff reinforced that each library should choose when to start showing Endeca to patrons; this is not up to the OPAC committee, but is an individual institution issue. Endeca does not have to be directly tied to the implementation of Aleph Version 18.