

Council of State University Libraries
Public Services Planning Committee
Quarterly Report: November 2007
Submitted by Rebecca Bichel, PSPC Chair

This report includes discussions and activities from PSPC and PSPC subcommittees from September through November 2007.

Information Items

1. Public Services Planning Committee:

The PSPC Committee is having their annual face-to-face meeting on Friday December 7th at the University of South Florida. The group will work on the PSPC Action Plan for the CSUL Directors. The committee will have a presentation and discussion on the innovative user studies conducted at the University of Rochester and University of Minnesota and how we might do such user studies at our institutions.

2. Circulation Subcommittee:

The Circulation Subcommittee had conference calls in September and November.

- a. The September conference call was dedicated to a discussion of self-check out. Zach Dunmire of 3M attended the call to answer questions. FCLA has purchased and installed their machine; their initial testing should be completed in December. The next phase will involve testing it at the University of Florida.
- b. The November call featured a discussion of identifying SUL-wide Circulation enhancement priorities to assist FCLA with implementation. They will be sending a list of available enhancements for our review. The committee also informed FCLA about the use of NOTIS data and how it would most likely be accessed in Circulation.
- c. Bridgett Turnipseed of FSU was selected to be the Chair for 2008. Conference calls will continue bi-monthly in odd months, on the second Friday at 11:00 AM. The January call will be pushed back a week because of ALA. *Submitted by Lori Driscoll, Chair.*

3. ILL Subcommittee:

There were 3 main issues for the ILL Subcommittee.

- a. The first was on the topic of the blocking policy set up by the UF business office barring libraries from UF if the library borrowing has overdue or lost items. All the participants on the call responded that they do not block other libraries. UF asked to have the support to stop this policy at their library.
- b. The second topic was the Florida Resource Sharing Conference. The conference is \$65.00 for registration and is being held at the UCF Rosen College of Hospitality Management.
- c. The third topic was unmediated borrowing. Ex Libris was asked about the ILL module-an interface between ILLIAD and Aleph from the meeting of the State Library Directors at their joint meeting. There was discussion about Endeca, unmediated borrowing and what the future holds. FCLA stated that their job was to understand the technology but the group has to look at the issues, the Task

Force has to do is research what is out there and what service expectations are desired by the group. *Submitted by Kristine Shrauger.*

4. **Information Literacy Subcommittee**

This Subcommittee met in November by conference call and elected Jacque Druash and Arianne Hartsell, both from FSU Libraries, to co-chair the Subcommittee. The group planned monthly conference calls beginning in December and in the December call will develop an agenda for 2008. *Submitted by Jacque Druash and Arianne Hartsell, Chairs.*

5. **OPAC Subcommittee:**

- a. The Subcommittee proposed an OPAC Summit scheduled for January 25, 2008. The purpose of the summit is to discuss features of next generation OPACs and move toward a definition and clear vision of the next-generation SUL OPAC with examination of the challenges and opportunities for the various features and requirements independent of any specific ILS system.
- b. Endeca usability testing taskforce formed and is ready to test specific Endeca features with users (USF, FSU, and UF participating).
- c. All issues on the Endeca OPAC current issues list have been addressed or dismissed (i.e., truncation). Larger issues such as browse feature, course reserves, etc. need to be prioritized and discussed at the summit. Although most OPAC issues on the Subcommittee's list have been addressed, problems still remain and issues with particular records still arise weekly and are discussed on the listserv, at the meeting, and are addressed by FCLA programmers during the week. Loading of records from Aleph to Endeca has stabilized to twice per week. (The full report is attached.) *Submitted by Nancy Cunningham, Chair.*

Respectfully submitted,

Rebecca Bichel
Chair, Public Services Planning Committee
November 19, 2007

PSPC OPAC Subcommittee Quarterly Report

Submitted by:

Nancy Cunningham, Chair

USF Representative

November 19, 2007

Summary of progress:

- Summit to be held on 1/25/08 on the future of the SUL OPAC. Topics need to be solidified and organized by discussion session. Purpose of the summit is to discuss features of next generation OPACs and move toward a definition and clear vision of the next-generation SUL OPAC with examination of the challenges and opportunities for the various features and requirements independent of any specific ILS system. List of attendees needs final verification.
- Endeca usability testing taskforce formed and ready to test specific Endeca features with users (USF, FSU, and UF participating).
- All issues on the Endeca OPAC current issues list have been addressed or dismissed (i.e., truncation). Larger issues such as browse feature, course reserves, etc. need to be prioritized and discussed at the summit.
- Although most OPAC issues on the Subcommittee's list have been addressed, problems still remain and issues with particular records still arise weekly and are discussed on the listserv, at the meeting, and are addressed by FCLA programmers during the week. Loading of records from Aleph to Endeca has stabilized to twice per week.

September

- All SULs successfully transition to the use of Endeca as their primary OPAC.
- Subcommittee submitted a proposal to CSUL Deans and Directors to have a joint OPAC-TSPC summit on the future of the SUL OPAC. Proposal was approved. Summit will be hosted by UCF. Taskforce organized to plan and implement the summit.
- Subcommittee created taskforce to conduct usability testing on Endeca. USF, FSU, and UF will be getting IRB approval to test Endeca features with students and faculty and submit results to the Subcommittee.
- Various features fixed or modified include RSS feed, browse search, display of results, variation on word spellings, diacritics, permalink, icons, etc.

October

- Date of January 25th, 2008 set for the all-day summit. Attendance will be capped at around 50 because of space constraints. UCF volunteered the use of a UCF facilitator. A wiki has been created to gather and share information for the summit. There is a collection of articles already posted about next generation catalogs < <http://opacvision.pbwiki.com/AllPages>>. Discussion about feasibility of charging a fee to register for the summit. Taskforce decides against a keynote speaker for the summit. Nine draft "umbrella" topics are developed for the summit.
- Endeca usability taskforce met and discussed testing the save, print, email and browse functions. The browse function test should help the committee decide how or whether to implement this feature.

- Subcommittee continues to discuss usefulness of browse and “look ahead” feature for our users, librarians, and library staff.
- Diacritics now functioning in Endeca. Feasibility of implementing the truncation feature discussed. Statistics reveal truncation searches form a very small percentage of user searches. Technically, the truncation feature may be a drag on the system. Subcommittee decides to drop this feature.

November

- Summit planning taskforce sought and received approval from the CSUL Deans and Director to charge participants a fee of 50 dollars to attend the summit. This charge will cover parking, lunch, online registration, and the use of a UCF facilitator. First draft of suggested summit topics to be changed or modified include:
 1. **New User features** – This discussion would center around Web 2.0 technologies which allow users to interact with the catalog and initiate services such as RSS feeds, tagging of records with user-created subject headings and commentary, using the catalog with systems such as LibraryThing and Del.icio.us.
 2. **Incorporating more resources in the catalog** (i.e., digital library records, articles, google results, etc.) – This discussion would center around what types of resources we want to include in our OPAC to enhance the user experience and results. This would include federated searching with articles, digital records, etc.
 3. **Interface customization by user** (Google widgets, etc.) – This discussion would regard the ability of users to customize the catalog interface to enhance their experience.
 4. **Usability and Assessment** – This discussion would regard the ability to get reports and use reports and statistics to continuously improve the catalog experience for our users.
 5. **OPAC interoperability with other systems** – This discussion would regard the ability for our OPAC to integrate with other major university systems such as course management software such as WEBCT and BlackBoard and course reserve modules.
 6. **Gateway to improved accessibility** – This discussion would involve how to improve accessibility to catalog records by the creation of indexes, etc. and include the discussion of the role of FUBR, cataloging practices, and data integrity.
 7. **Universal Borrowing and the OPAC** – This discussion would involve universal borrowing and the role of the OPAC.
 8. **Communication** – This discussion would regard how we can improve our communication methods and tools for the purposes of statewide decision making, sharing of information, and generating ideas about the OPAC and issues connected with it. This discussion may include ideas on how to improve the communication between the committees, between the committees and the CSUL Deans and Directors, and among the committees, FCLA, and the CSUL Deans and Directors.

9. **New Technologies (Open Source, etc.)** – This discussion would regard the new technologies (such as XML and Open Source) which would impact the implementation of Web 2.0 technologies with the OPAC.

- Usability taskforce met and discussed status of IRB approval process for each institution's testing team and suggested making a change to Endeca on the test server regarding the browse feature. Suggestion was to move the browse feature in the Advanced Search to the basic search screen and test users' reaction to this. This would replace the "look ahead" feature.

OPAC Subcommittee continues to meet on the 2nd and 4th Thursday from 12 to 1:30 p.m.
Endeca Usability Taskforce meets on the 1st and 3rd Thursday from 12 to 1:30 p.m. The Summit Taskforce is now meeting almost weekly to plan the summit.