

Council of State University Libraries Public Services Planning Committee

Quarterly Report: May 2007

This report includes discussions and activities from PSPC committee meetings conducted via conference call on March 26 and April 30, 2007, and from subcommittee activities.

Action Item

1. **Endeca Status Report:** The OPAC Subcommittee and PSPC recommend that Nancy Cunningham, chair of the OPAC subcommittee, and Rebecca Bichel, chair of the PSPC, be invited to address CSUL in the May/June meeting to provide a status report on Endeca implementation and to discuss Endeca implementation dates. The subcommittee in partnership with FCLA has been diligently moving through a lengthy list of usability and design issues in its two-hour weekly conference calls. There remain a number of issues of importance as the Endeca launch date nears. The subcommittee has also made a recommendation that FCLA sign a short-term contract with a web designer for the Endeca OPAC to address “design and navigation issues that need to be addressed before roll-out.”

Information Items

1. **Public Services Planning Committee**
Planning continues for a Government Documents Summit, which will be scheduled in early June to coincide with the 100th anniversary celebration of the University of Florida as a land-grant college regional depository. The committee shared feedback and idea from recent tours of library renovations and commons implementations. At the request of the OPAC Subcommittee, the PSPC charged an ALEPH v. 18 Reserves Task Force to work with FCLA on implementation for those schools using ALEPH for course reserves.
2. **Circulation Subcommittee** - Lori Driscoll, UF, Chair
The Unmediated Borrowing Task Force was recently reactivated and set up a blog at <https://sblogs.fcla.edu/index.php/circ> that anyone in the SUS can view and post comments (use Aleph userid / password). They will establish goals and a timeline, then look at other sites and technology that can be used. The plan is to report on findings to CIRC & ILL committees in October, then PSPC in November and CSUL in December. UF almost has a workable template for receipt printing ready and will send to FCLA for institutions to share when the margins aren't quite as wide. FCLA reported out that they are setting up advanced booking in ALEPH v18, but need support from ExLibris to resolve issues that were encountered. Investigation of pricing models for self-checkout equipment from 3M continues.
3. **Information Literacy Subcommittee** – Nancy Cunningham, chair
The Information Literacy Subcommittee has been meeting monthly via teleconference with the purpose of sharing information, experience, and professional trends on a variety of issues relating to library instruction and information literacy. Several sub-committee members (representing FIU, FSU, UCF, USF) did a presentation at FLA on information literacy activities at each institution. Bill Modrow will become chair of the subcommittee.

4. **Interlibrary Loan Subcommittee** – Kristine Shrauger, chair
The subcommittee has been investigating options for unmediated borrowing; Jennifer of FCLA is assisting with information gathering. Service goals are being developed and should be ready to forward to PSPC by end of calendar year. Both an ILL customer service survey is in development (locally customized) and a survey of current ILL practice among SUS libraries. The latter should be useful for describing where we all are and perhaps suggest areas for improvement in ILL service. Progress continues on the revision of existing SUS ILL guidelines. A planning group is hard at work on a program for a Florida ILL Conference and Workshop. Mary Jackson will deliver the keynote address on ILL Best Practices at the Florida ILL Conference and Workshop. Other programming will include copyright clearance issues and OCLC ATLAS training.
5. **OPAC Subcommittee Leadership:** In March 2007, Karen Schneider (FSU) and Nancy Cunningham (UCF) stepped in to the important role of co-chairs of the OPAC Subcommittee. They provided excellent leadership and made great progress in partnering with FCLA in Endeca implementation. The group scheduled weekly conference calls, and through frequent email consultation were able to work quickly through many issues. Ms. Schneider very unexpectedly left FSU and her OPAC role on April 19th. Nancy Cunningham subsequently assumed full leadership roles for the subcommittee. During a three week overseas trip (already planned), Nancy arranged for Barbara Tuck, UNF, to provide leadership. Nancy will return the week of May 28th. In lieu of a subcommittee report in Nancy's absence, I have attached a copy of the most recent agenda for the OPAC Subcommittee conference call. It gives an excellent snapshot of the ongoing work of this group.

Respectfully submitted,

Rebecca Bichel
Chair, Public Services Planning Committee
May 14, 2007

DRAFT AGENDA

***** = permanent agenda items**

1. Approval of minutes from the last meeting May 4, 2007***
2. Approval of agenda – any additions?***
3. Roll Call *** – Barbara Tuck
4. FCLA Update
 - a. Report of server load test.
 - b. Changes to ENDECA made during the week.
5. PSPC Update – Rebecca Bichel (PSPC Chair)
6. TSPC Report – Ya’aqov (UNF, Liaison to OPAC from TSPC)
7. Usability studies – Update
 - a. Jon Blackburn of FSU -- study postponed from the May 4 meeting.
- 8. Old issues – Update**
 - a. System numbers – getting to Aleph from Endeca – not finding the fields reported last week.
 - b. Search history – FGCU
 - c. Renew next to Library Account to make it easier to find. – FAMU – Done!
 - d. Predicted titles – some voted by email – we should make this legal with a vote for the minutes.
 - e. Link to Union Catalog at bottom of facets. Automatically does the same search in the Union Catalog – very nice!
- 9. New Issues**
 - a. After a search, select items, Add to List and then View List, from the View list page, if you want to email selected items to yourself checkboxes are provided but all records are emailed not just the selected items. – Jon Lutz
 - b. Stalfelt, Martin Gottfrid diacritics example – Not working as expected – Jimmie Lundgren
 - c. Duplication of fields becoming hot topic. Reported several times since LIBOPAC has been included in emails.
 - i. Has duplication of the 245 and 260 fields been noted as well – Betsy Simpson, UF
 - ii. Special added information in a record. What if a library has a specific code to pick up particular items – ex. online databases. Will that still work? What about added information in special collections records – example – signed book – Color Purple. -- UNF
 - iii. Not being able to use a library’s own records now at issue. Suggestions? TSPC should work on this? New special committee?
 - d. Is there still interest in the Genre facet? Technical services at UNF suggests limiting to one field to suppress some of the things we were seeing before.
 - e. Committee should vote to keep or reject Library/Collection facet label. Requested by UNF and showing already.

- f. LCC, NLM and SuDoc are foreign to students. Is there better language? Perhaps LC Subj. | NLM Health | Gov. Docs. Maybe a mouseover with the entire phrase?
- g. \$ xnoindex in 856 field – should be suppressed. – Looks like this is fixed?
- h. Change facet name from “Library” to “Library/Collection” for the sake of those who do not have more than one library.
- i. Will patrons be able to place holds for priority cataloging requests on items that are On Order or In Process. – UWF
- j. Add “journal” to the list of selections in the drop-down format box on the Advanced Search screen – FAMU
- k. Deadline for Endeca header/footer changes – FAMU
- l. Issues reported by FSU – some already fixed, others known problems.
 - i. Limit to specific music library
 - ii. SuDoc call number display not displaying in the correct order.
 - iii. Please add date range to Advanced Search page.
 - iv. |c field in the 245 being indexed? ex. Rampal “revised” a kuhlau piece.
 - v. 240 uniform titles are displaying toward the bottom of the record as “other titles” and not hyperlinked.
 - vi. FSU system 006066257 – question about facet heading leading to record not expected.
 - vii. FCLA has the entire list of reported problems. We’ll let them handle it!
- 10. Aleph v.18 enhanced indexing and impact on ENDECA. How will ENDECA benefit from the enhanced indexing features in Aleph v.18?
- 11. Calls for 5/18 and 5/25 – done – same number and code as 5/11
- 12. Other open issues
- 13. Review timeline***

Currently outstanding issues

- 14. System load
- 15. Usability study input
- 16. Call number browse, other indexes (i.e., sudocs)? **Is this already done?**
- 17. OPAC display in general
- 18. Display of locations (not working at some SULs) **Is this done?**
- 19. Search help needs to be written.
- 20. Facets do not reveal correct information based on the union marc (i.e., 856>505) **Still a problem?**
- 21. Possibility of merging facets to lessen patron confusion. **Discussion?**
- 22. Possibility of changing current facet label name to increase clarity for patrons – done???
- Are we finished with this? – suggested that we use Library/Collection – for the sake of those who do not have other libraries**
- 23. View list for displaying, emailing, and printing need to be adjusted and checked. -- seems to be working fine now. **Are we finished with this?**
- 24. Print one record. – Done!
- 25. Be able to bypass “Add to List” and get straight to “View List”. Low priority – possibly something in the future.

26. When clicking on “Library has” it automatically drops user down to the detailed holdings, - can it drop you to the summary holding below system number. – FCLA says this can be fixed and will do so. **Done!**
27. Add 1 2 3 Next >> at top and bottom of screen. FCLA will do. **Done!**
28. Duplication of records becoming a major issue. – not being able to use own catalog records now at issue.
29. Truncation symbols. Right now it is *. Not working. Endeca automatically looks for plurals and singular. -- To revisit after server testing.
30. Predicted Titles – show or not show – **we should have a formal vote.**

Subcommittee Decisions

1. Rearrange facet order – 3/23/07
2. Capitalization of first letter in facet items 3/23/07
3. Remove the “most popular” as sort option 3/23/07
4. Display both the union marc record and the local marc record 3/23/07
5. Brief record should state, “Available” instead of “regular loan” 3/23/07
6. Placement of “SFX” label after the title instead of before. 3/23/07
7. “Sign in” changed to Library Account
8. Subcommittee decides to get rid of the facet “Subject: Genre” 3/30/07
9. Change of Library to Location in Advanced search
10. Move the “**Narrow By Call Number Range: [LCC](#) [NLM](#) [SuDoc](#)**” over to the left side instead of the right side where it is now and keep “Hide” but get rid of “show”. – 4/6/07
11. In record display, change the word “up” to “next” and “results list”
12. Place Boolean search feature in the advanced search screen -4/6/07
13. Range of spelling options limited to 1 instead of 3 to avoid display of the many misspelling in the catalog. 4/6/07
14. Column of facets should remain on the left until there is compelling reason to change it– 4/19/07
15. “Library Has” should be changed to “Check availability”-4/19/07
16. Instead of “+” “-“ committee prefers “show” or “hide” - 4/27/07
17. First occurrence of fields will be used in a record to avoid duplications of titles, descriptions, etc. – 5/4/07
18. Move browse searching to Advanced Search Screen – leave just basic search on main page. – 5/4/07
19. Change Browse organized list to Browse results by: - 5/4/07
20. Leave Format – do not change to “Material Type” – 5/4/07
21. Change Subject: Era to Subject: Time Period – 5/4/07
22. Change Subject: Region to Subject: Geographic area. 5/4/07
23. Sort drop down box – change from Main Author to Author. 5/4/07