TSPC Quarterly Report
May 30, 2008

The Technical Services Planning Committee met in conference calls on March 27, April 24, and May 22, 2008. This report is based on the discussions and recommendations at those meetings and on subsequent email interactions.

1.   Committee changes

Jeff Bowen, the TSPC representative for FIU-Law, became the new Head of Cataloging at UNF and was appointed TSPC representative for UNF in May. A new representative for FIU-Law has not yet been appointed.

Barbara Tuck (UNF) agreed to become the PSPC OPAC Subcommittee's liaison to the TSPC in March. The TSPC and OPAC Subcommittee now each have liaisons to and from each other, which is proving its value in collaboration on Mango/Endeca and related issues and problems.

2.   CSUL and SULIG reports

On behalf of the TSPC, Jeannette Ward (UCF) represented the TSPC at the March CSUL meeting and also presented a report on TSPC activities at the 2008 SULIG meeting at FLA in April.

3.   Endeca issues

The TSPC again actively dealt with many problems and concerns relating to Mango/Endeca and collaborated with the OPAC Subcommittee on several issues. These included improvements in the Test Catalog, faceting display problems, and others. In May it was agreed with FCLA to display donor information for gift items in our local OPACs through faceting, if an SUL may want to do this, through standardized use of the 796 and 797 MARC fields to record donor information in bibliographic records.

4.   TSPC priorities for TAG analysis

At the request of CSUL and TAG, the TSPC identified two priorities which were submitted to TAG for analysis by that group: (1) to work with the TSPC, FCLA, and other committees to investigate report-generating products such as Ex Libris' ARC 2.0 or others which could allow the SULs to significantly increase the kinds of report information which could be retrieved from Aleph; and (2) to investigate videoconferencing products, some of which may be already available in our institutions, which could benefit the work of the TSPC and other committees through webinars, etc.

5.   TSPC action plan

The action plan was the basis for the largest part of the TSPC's work during this quarter. The following is a brief report on accomplishments to date:

1.1 Improve access to information via Mango/Endeca: FCLA is working in-house to provide speedier updates of data and bibliographic information from Aleph. As of May 29, "updates are now being done 5 days a week with a 35 hour latency. On Mon, Wed, Thurs, Fri, and Sat the data is refreshed at 4:00 am with

data that was merged 35 hours prior. Data entered or updated in Aleph by 5:00 pm will generally show up in Mango 35 hours after the cutoff. If there is a problem with the process that significantly effects the display of data in Mango, the data will not be updated for that cycle" (Josh Greben, FCLA).   FCLA continues working toward at least daily updating of all Aleph data at a future time.

There has not been further progress on writing a full report on the recommendations from the OPAC Visioning Summit in January with the OPAC Subcommittee, which is coordinating this task.

1.2 Shared bibliographic record file model: All TSPC representatives were asked to survey their deans/directors to ascertain their views, which were discussed at the May conference call. Most directors are in favor and see long-term cost and labor savings and enhanced searching and other OPAC-related services while recognizing the great initial efforts that would be needed including retrospective record cleanup projects. Another area is the implications of the very large numbers of records held by some libraries which have never been put into OCLC. One dean is in favor but feels that because of the budget situation, now may not be the best time to initiate this.

The TSPC has formed a special task force to investigate this option and report back to the TSPC. Members include Cecilia Botero (UF-HSC), Susan Heron (USF), Jean Phillips (FCLA), and Amy Weiss (FSU), The group has met by conference call and reports:

"We're looking into the various existing models, examining issues and discussing potential costs and benefits in terms of staff resources and other costs. We will be discussing possible workflows and the effect the merger would have on existing workflows, such as acquisitions and circulations workflows. According to FCLA there are various options available to us in terms of a shared bibliographic database and the group will be looking at all of them. We will contact various universities including Maryland who has recently moved to this model. The Task Force will be meeting weekly to further explore the issue and prepare a report for TSPC and CSUL."

There is also some interest in the WorldCat Local product, which USF has adopted, to become live in the fall. There are concerns about local catalog information not displaying in such a product, though. In this respect it is the opposite of a shared bibliographic record model.

1.3 Centralized Marcive full dataload for e-government document records: FCLA has identified a model whereby the full monthly e-docs dataload file could be loaded into Aleph and from there into Mango/Endeca so that the complete file of records could be available in every SUL OPAC. This would be of great benefit to users and would not affect the individual SULs' selection lists for non-electronic US government documents. The TSPC will forward its approval to the PSPC and will ask them to decide on whether to implement.

1.4 Improve GenLoad loading of bibliographic record files into Aleph: In April the TSPC decided on the enhancements to be included in the latest upgrade by FCLA.   Testing and implementation will be completed very soon.   Future GenLoad information will be available on the TSPC wiki.

1.5 Improve access to digital materials in Mango/Endeca: The Metadata Subcommittee has begun collaboration with the TAG DISC Subcommittee on

developing appropriate cataloging standards for Mango/Endeca and will hold joint discussions on how descriptive metadata are to be implemented in Digitool. For further information see the attached Metadata Subcommittee quarterly report.

3.1 Improve reporting functionalities in Aleph: Considerable effort has been made on this important task. FCLA is working on reconfiguring the Aleph data in the Data Warehouse into a more standard format so it can be better used for report writing with SQL, pending moving to a more flexible report writing tool. In addition, Jean Phillips (FCLA) has posted a useful new Reports Overview page at http://wiki.fcla.edu:8000/FCLA-LMS/51 with information on reports available in Aleph or through the Data Warehouse.

FCLA has requested TSPC members and the Authorities Subcommittee to submit requests for additional or improved reports which can be created using the Data warehouse. TSPC members were also asked to forward requests for specific reports which would need to be created through a third-party product such as ARC 2.0 to Jeannette Ward (UCF). These would be compiled into a list and after review forwarded to TAG for their consideration regarding investigating ARC 2.0 or other report-generating products which might be compatible with Aleph data.   Because TAG will coordinate this investigation, with all the committees, the TSPC then would not further pursue its own effort which was noted as activity 3.1.5 under this objective.

However, FCLA is also investigating BIRT (Business Intelligence and Reporting Tools), an Eclipse-based open source reporting system for web applications, as a better option for FCLA and the individual SULs for generating reports beyond what is provided within Aleph. If successful, BIRT could obviate the need to pursue a third-party product which would need to be purchased, such as ARC 2.0.

3.2 Data cleanup activities in the local SUL catalog databases: At the May conference call it was agreed to create a spot on the TSPC wiki to identify needed projects both system-wide or local, or one-time or ongoing, and to work with FCLA on scheduling and implementing them either globally or locally. Significant local staffing efforts and some repetitive work will be required, which is a "pro" reason for moving to a shared bibliographic record model union catalog.

3.3 Improve authority control through automatic updating of authority headings: Work on this item will begin after the indexing review in 3.4 below has been completed and our local indexes have been regenerated.

3.4 Improve indexing in Aleph: Mary Ann O'Daniel (FCLA) has forwarded information on current indexes and their usage and required system resources to the TSPC along with recommendations for deletions or adding new indexes. These recommendations will be discussed in June. Also, on the dev18 server the authority file direct indexes have been rebuilt with the new parameters approved by the Authorities Subcommittee and are under review. After the full review has been completed, FCLA will work with each SUL on regenerating the indexes in their local catalog databases to implement the changes made. The changes should then improve the search and retrieval options for our users in Mango/Endeca.

3.5 Metadata Subcommittee will establish a working relationship with the TAG DISC Subcommittee: Gail Clement (FIU) serves on both groups so is acting as

the liaison between them. Various discussions on descriptive standards and other issues have already taken place or are planned, and the Metadata Subcommittee is modifying its charge to emphasize its role in collaboration and cooperation with other CSUL committees and subcommittees. See the separate Metadata quarterly report for more information.

4.1 Participate in planning for a remote statewide storage facility: Emmett Denny (FAMU) serves on the storage facility task force and serves as its liaison to the TSPC. The TSPC is keeping abreast of developments and will participate when the task force begins to consider TSPC-related issues.

6.   Authorities Subcommittee

The Authorities Subcommittee is submitting a separate report.

7.   Metadata Subcommittee.

The Metadata Subcommittee is submitting a separate report. Metadata also wishes to modify its charge to emphasize its role in collaboration and cooperation with other CSUL committees and subcommittees regarding metadata issues.   The modified charge, with changes shown in boldface, is being submitted separately.

Action item: the TSPC requests approval of the modified Metadata Subcommittee charge.

Respectfully submitted,
Dan North, Chair