

FCLA JOINT MEETING
SUS TECHNICAL SERVICES PLANNING COMMITTEE
OCTOBER 26, 1999

All SUS TSPC members were present with the exception of Vicki Grahame (FIU) who has accepted another position at UC-Irvine, Janice Donahue (FAU) who was attending the Digitization Committee meeting, and the representative for USF-HSC as that position is currently vacant.

COMMITTEE REPORTS:

AUTHORITIES SUBCOMMITTEE: Phek Su (UF) & Mary Ann O'Daniel (FCLA)

Nancy Williams submitted a written interim report, which will be posted on the FCLA web site. No specific activity took place this past year. UF worked with Gary Strawn fine tuning some of the BatchBam functions. UF began using BatchBam with government documents and did a great deal of review and testing of the cataloging client, CATALYST; they are very happy with the new global change function.

The Subcommittee proposed changing from a subcommittee to a task force as they feel they have already addressed the major concerns of their initial charge. This was tabled by the Committee.

They recommended that the subcommittee co-chairs be from different institutions to increase representation and that the membership should include operational staff. Phek Su requested that she be relieved from the co-chair responsibility. The Committee agreed on all points.

The subcommittee proposed a workshop to be held in the spring, co-sponsored by FCLA and UF, which would focus on coordinating efforts for database clean-up in preparation for migration to a new system. The workshop would deal mostly with CATALYST, global change functionality and the use of various Arrow reports to identify errors.

The record limit of 1000 for global changes in CATALYST was viewed as a major roadblock to database clean-up. FCLA said that this was a safety feature, not a system requirement: the present version of CATALYST has no way to terminate a change once it has been initiated, so in the case of an error in the application of global change the damage would be confined to at most 1000 records. A suggestion was made to add a "preview before changing" function. FCLA will consider how best to expand the limit while protecting us from errors.

The question was asked if CATALYST could be used for global changes to the copy holdings records. FCLA answered that the global change function was designed to work only with the variable fields of

the bibliographic record. However, macros could be used for correcting some of these errors and CATALYST does have copy holdings macro capabilities.

John Hein (UNF) announced that they have successfully loaded and are using the 32 bit CLARR. Anyone encountering problems with this program can contact John with questions.

TF-CAGER: Task Force for Cataloging and Access Guidelines for Electronic Resources: Jim Michael (USF) and Jimmie Lundgren (UF)

A motion was made and accepted to change this group from a task force to a standing subcommittee because the issues surrounding cataloging and access of electronic resources are

likely to continue for some time. No change was made in leadership at this time. There was also discussion concerning CAGER's interaction with the Digitization Committee and whether CAGER should continue as a Cataloging subcommittee. This was tabled until next year.

Last October TSPC recommended that CAGER create records for electronic resources in a common processing unit – LTQF – which could be used by all libraries: materials listed there would be searched when a patron accessed the individual SUS libraries' local catalogs. Currently it is primarily being used for the Florida Heritage Collection records. Beyond the Florida Heritage project, however, the use of LTQF is more complicated than anticipated. Not all e-resources are available to every SUS library and patrons could be frustrated to find that an item which appears to be listed in their local catalog is not available to them. CAGER determined that a common processing unit could be used one of three ways:

1. A file, not viewed by patrons, from which libraries could derive a record for their own processing units.

The first library to catalog an e-resource would put it in LTQF as well as their own processing unit. This would be double work for the first library and since records can be derived from other SUS partitions presently, very little benefit occurs for the extra work.

2. A file of catalog records for any e-resource, which is defined as part of every local catalog when a patron searches LUIS.

The first library to catalog the resource would put it in LTQF and each subsequent library could attach holdings or access information. This reduces cataloging costs, but can confuse and frustrate the patron if he finds a record in the local catalog for a resource that his library has not paid to access.

3. A file of catalog records, which looks like a part of each local catalog, for only those e-resources accessible to all 10 universities.

A library cataloging or maintaining an e-resource would have to determine whether it was available to all 10 universities; if so, it would be cataloged in LTQF. If not, it would be cataloged in the library's local processing unit. Patrons would see records for only what was available to them. If one library withdrew support, records would have to be deleted from LTQF and created in local processing units.

CAGER will be surveying the public services staff at the SUS libraries about this topic very soon. Other issues they have been addressing are: how to share the cataloging workload among the participating institutions, a recommendation to implement the 856 display constant used by OCLC and MARC, cataloging guidelines for free websites (especially free government documents websites), how to coordinate with the Digitization Committee on metadata issues.

NEW SYSTEM SUPPORT

TSPC agreed to recommend to the directors the creation of three subcommittees corresponding to the three functional areas of technical services -- acquisitions, cataloging, and serials, thus mirroring the subcommittee structure of the Public Services Planning Committee. The charge to these subcommittees, at least for the immediate future, would be to respond to all issues having to do with the transition to a new library management system, including all questions having to do with the preparation for database migration. In the same way that the PSPC has used its committees to work with the SUS Digital Library System Review Committee ("the new system committee"), TSPC would like to formalize its committee structure to do likewise.

OTHER BUSINESS:

MESH 1999 and 2000 data loads status: FCLA staff indicated that the problem with these loads was one of scheduling programmer time. UF would like to see this annual load placed on a more regular and consistent basis.

Z39.50 status: A programmer is working on this and is close to completing the task. A complication is that the server is currently down, but being worked on. FCLA's existing Z39.50 server software broke when a new version of MVS (the IBM mainframe operating system) was installed. The problem has been reported to IBM. An alternative will be to use the Z39.50 server software that is being developed by an FCLA programmer for a grant project.

Loader programs for vendor and other files: FCLA staff is behind on all batch-loading jobs.

RLIN loads: UF asked for this to become more routine.

RECOMMENDATIONS TO FCLA

The group reviewed the list created by FCLA of items that wouldn't be done if current LMS

development was frozen. The underlying criteria when reviewing the list were to keep only those items that would aid in migration to a new system, that were close to implementation or would not impact heavily on programmer resources needed to prepare for migration or the digital initiative.

DECISIONS:

MAINFRAME NOTIS AND SUPPORTING PROGRAMS

Continue: Retrospective autoclaim rerun with modifications to incorporate changes from ongoing version

ACQUISITIONS CLIENT WITH EDI

Drop.

PO-PRINT

Continue:

- E-mail orders
- EDIFACT orders with Harrassowitz (followed by other vendors)

CATALYST

Give highest priority to: Bibliographic headings verification against authorities.

Continue development if easy or if specifications can be simplified:

- Improve tag table distribution
- Additional bibliographic information in holdings tree
- Item relinking
- View order records
- Export multiple records to a single file
- Import records from a multiple-record file
- MHI headings view of index (or at least some kind of list of headings that do not have an authority record associated with them)

SerCLIENT

Continue development:

- OPAC display of individual receipts (currently in test by FCLA)
- Claiming: EDIFACT with FAXON (others to follow); Printed; E-mail
- Security (Currently in development)
- Enhancements requested by Task Force

New chair for 1999: Susan Heron (USF); incoming chair elect Dan North (UWF)