

**Report of TSPC activities during the year April, 2005 – March, 2006
for SULIG meeting at FLA, April 20, 2006**

**Dan North, UWF
TSPC chair, 2006**

1. TSPC meetings in 2005-2006

The TSPC met via bimonthly conference calls and also had meetings during the November, 2005 Joint Meeting. Our TSPC and subcommittee reports and official information are on the CSUL website (www.fcla.csul.edu). The TSPC listserv is also very helpful for ongoing awareness.

Dan North was elected vice chair / chair elect in September, 2005, and became chair on January 1, 2006. Cecilia Botero of UF-HSC became vice chair / chair elect.

For our two subcommittees, Sue Wartzok of FIU and Priscilla Williams of UF continued as Authorities subcommittee co-chairs for 2006, and Naomi Young of succeeded Jim Michael of USF as chair of the CAGER subcommittee in 2005. Kimberly Montgomery of UCF was appointed Vice chair / chair elect of CAGER in January, 2006.

2. Aleph status

During 2005-2006 the Phase 2 and Phase 3 libraries are completing the migration to Aleph. At this time, FIU, FAU, and UCF are left and their STP dates are May 1, June 12, and July 10.

The TSPC and our libraries have also been working with FCLA on resolving problems and in learning the finer points of Aleph. FCLA staff have been very helpful. Libraries have also been developing workarounds where Aleph doesn't support needed functionalities, and FCLA has modified various report retrieval profiles in Aleph so that libraries can generate more useful reports. Donna Alsbury's data warehouse project ("Aleph Arrow") has been immensely useful as well. Some problems are very difficult and ongoing, such as the very slow loading of large datafiles at UF. On the other hand, Much of Aleph is customizable, e.g., any pulldown menu in a module where the library can specify its own variables can be modified, such as material types in order records or object codes in invoice records.

3. CSUL restructuring

In 2005 the CSUL implemented a restructuring of the existing committees and subcommittees and their relationships with the CSUL. The TSPC committee and subcommittee charges and mission statements were

reviewed and changes were recommended to the CSUL. In the process the CSUL inadvertently dropped the CAGER subcommittee from the list and it needed to be reinstated.

4. Macro Express

During 2005 the Phase 1 libraries were using Macro Express to create macros to facilitate workflows in Aleph. The TSPC surveyed member libraries and recommended to the CSUL to buy enough copy licenses for the product at a consortial price so that there would be enough for each institution, including the Phase 2 and 3 libraries as they came on board. A total of 790 licenses, beyond those that some libraries had already bought on their own, were purchased by the member libraries.

5. Interinstitutional access (the NOTIS LTRF functionality)

Following discussion at the January, 2005 TSPC meeting in Gainesville, Daniel Cromwell of FCLA initiated an effort by the Phase 1 library Aleph coordinators to develop a special Aleph guest user with appropriate read-only permissions that would permit access by any library to any other library's staff mode catalog in the SUL consortium. The LTRF functionality in NOTIS is the starting point. Rich Bennett of UF, Daniel Cromwell of FCLA, and Dan North of UWF became the core group working on this. At the Joint Meeting, Dan and Daniel demonstrated the prototype to the TSPC and obtained guidance on finishing the project. The special user has access to the Cataloging, Acquisitions, Serials, and Items modules, but not to Circulation.

Following the meeting, Daniel then refined the permissions and Rich and Dan have done further testing in order to remove any problems before the user can be installed in every library's Aleph client. Aleph permissions are tricky and it can take some effort to find out why a particular permission may or may not work as desired. For a variety of reasons at both UF and UWF this testing has taken longer than expected. Hopefully the bugs will be removed soon and the access can become available to all.

6. EDI ordering and invoicing in Aleph

In 2005 UF successfully completed an EDI invoicing pilot test project with Ebsco and UWF completed a successful monograph firm ordering test with Midwest Library Service. As more libraries have come on to Aleph since then, other libraries have also begun tests with other vendors. UWF will test EDI monograph invoicing with Midwest as soon as they have developed an interface.

7. Future joint meetings and topical summits

The next Joint Meeting will be February 12-14, 2007, at UCF. There will not be a Joint Meeting in 2006. Rather, there will be various topical "summit" meetings on specific topics of interest to more than one committee, and which cannot be given enough time at a joint meeting for proper discussion.

The topical summit for the TSPC is Cataloging and Metadata. This issue is of interest to both the TSPC and the DDAC. Preliminary discussion with the DDAC is underway. However, as the DDAC is also involved in another summit, it will probably not be held until fall 2006. At its next conference call the TSPC will continue our discussion on what this meeting should accomplish.

8. TSPC priority issues for 2006

At the November meeting the TSPC identified four issues as needing priority attention during 2006.

- **SWIKI / training documents**

FCLA has created a SWIKI website for the TSPC for posting of training documents by SUL libraries, "how to" documentation on various Aleph functionalities and reports, information on upgrading to Aleph v. 18, and other material. The SWIKI is password-protected and serves as a resource for sharing training materials and other useful information on working in Aleph. Anyone in the TSPC can post something and the SWIKI is very useful. If other committees want to have their own SWIKIs, they should contact FCLA.

- **OCLC WorldCat Analysis (WCA) project by the CPC**

At the request of the CSUL, each institution has purchased the WCA product in order to evaluate their collections on a statewide basis. The TSPC is interested in this project as it may affect technical services in our libraries. Helen Wigersma of UWF is coordinating the project task force for the CPC and has agreed to keep the TSPC informed of developments through Dan North, who is also at UWF. Thus far the group has tested the product and has asked the CSUL for more guidance on completing the project in light of the array of directions such an analysis could take.

- **Electronic Resource Management (ERM) evaluation and planning (Verde)**

Several libraries have decided to purchase Ex Libris' Verde product in order to better manage the electronic databases and other products they own or are considering for purchase. Verde was demoed at the November meeting. The TSPC recommended creating a special task force of TSPC and ERS representatives from those libraries to coordinate the planning and installations, but the CSUL decided that the libraries designate special liaisons to coordinate and work directly with FCLA instead. The consortial version of Verde will be installed in June.

- **Internet conferencing technology**

The TSPC is exploring the use of Internet conferencing software for such purposes as multiple point training or demos of products like Macro Express or other applications. Such software could permit several people at an institution to participate and could also eliminate travel costs to face-to-face meetings. A test group consisting of Dan North of UWF, Jason Fleming of UF, and Cecilia Botero of UF-HSC has been looking at various products since January.

Some requirements we have developed include support for 25-50 participants and up to 25 individual remote computers (or points), bidirectional audio, ease and convenience of use, and reasonable cost. A preliminary list is posted on the TSAPCD SWIKI. Video webcasting is nice but not essential. So far we have tested several products such as LiveMeeting, Persony, and others. We are finding that technology may not yet have developed to support a large number of points without slowing the web traffic significantly. Cost and ease of functionality are issues as well. Some existing good commercial products used by vendors for demos, where a host pays for the desired number of "seats" or points up front, may be too expensive for our consortium to use at present.

We will continue exploring this emerging area as options develop. Ideally we would like to identify a good product that the TSPC and all our committees could use and recommend it to the CSUL. Once purchased the product could also be used for many other library applications as well. If anyone would like to join our test group let me know (dnorth@uwf.edu or 850-474-2449). FCLA is also investigating options.

9. Planning for upgrade to Aleph v. 18

FCLA has been keeping us informed of their progress on this as they work with the test database files on the development machine. The target timeframe for migrating each of our catalogs to version 18 is summer, 2007. We are all looking forward to the improvements and enhancements!