

TSPC Quarterly Report

November 25, 2008

The Technical Services Planning Committee met in conference calls on September 25 and October 30, 2008. In addition, Dan North (UWF), TSPC chair, and Cecilia Botero (UF-HSC), incoming vice-chair/chair-elect, attended the special CSUL meeting with all four committees and FCLA at UF in Gainesville, November 14. Cecilia attended in place of Sue Wartzok (FIU), the incoming TSPC chair. This report is based on the discussions and recommendations at those meetings and on subsequent email interactions.

During the fourth quarter of 2008, TSPC work was primarily focused on action plan items while awaiting decisions from CSUL regarding moving toward a single bibliographic record architecture for our database files.

1. Upgrade to Aleph v. 19 in 2009

At CSUL's request the TSPC polled its members on the desirability of an upgrade to v. 19 of Aleph in 2009. The result was mixed: for cataloging/authorities the vote was 9 no and 5 neutral, and for acquisitions/serials the vote was 4 yes, 2 no, and 5 neutral. Based on this weak endorsement the TSPC feels that our vote does not give CSUL a solid basis for a decision, especially considering the many features in circulation, administration, and other areas.

Action item: The TSPC recommends that CSUL poll other groups as well, particularly the PSPC and the project coordinators list, for their opinions on upgrading to v. 19.

2. Reports

More progress was made on improvements to Aleph reporting options. In order to reach a consensus on what fields and types of records should be included in collection reports where all included records are counted the same way for all SULs – e.g., where status field (STA) = SUPPRESSED or the records are temporary in nature and will be eventually replaced by full cataloging records - FCLA polled the TSPC members, who agreed to exclude such records in collection reports and to vote as a group again on any future changes. FCLA is also investigating with the libraries the many item record status combinations which are currently in use across the SUS in order to reach a consensus on how to deal with item records in collection reports.

FCLA has also continued to investigate adopting BIRT as a new internal report-generating platform (see the previous TSPC quarterly report, August 18, for further information), and has converted some Aleph ARROW acquisitions reports to BIRT for testing. BIRT reports will be included in the Aleph ARROW menu as they are finalized.

3. Single bibliographic record report

Although TSPC is awaiting a decision from CSUL on implementing a single bib architecture, to be discussed again at the December, 2008 CSUL meeting, TSPC continued to discuss this in its conference calls and by email. FCLA is also continuing its own investigation – for example, to make sure that all holdings, item, acquisitions, and other records will link correctly, and to make site visits to other institutions. SULs would continue to have access to their Aleph instances for some

time after migration to single bib. A WorldCat Local-based OPAC, which USF has implemented, is also being discussed. In addition, there was considerable discussion, with TSPC representatives' participation, at the special November 14 CSUL meeting. Important factors influencing a decision include the current negative economic trends and staff shortages at many SULs vis-à-vis the complexity and two-year or longer length of the process.

4. Indexing review

Considerable progress in this high-priority action plan item was made. All the authority indexes were rebuilt on the DEV18 server, and the various bib indexes are being tested. In November the SULs voted on final changes to the word indexes. After testing, FCLA will then rebuild each SUL's local indexes. When reindexing is completed, work on an additional action plan item, to improve authority control through automatic updating of authority headings in Aleph, would begin.

5. Other TSPC action plan items

Significant progress on the rest of our action plan items continued to be achieved during this quarter. The following reports further accomplishments to date for those items not already noted above or in our previous quarterly reports:

1.1 Improve access to information via Mango/Endeca: Since January FCLA has been able to move from 4-day latency for new Aleph data to updates 5 days a week with 24-hour latency while reserving 35-hour latency for correcting problems or errors. They continue to explore the feasibility of even more frequent updating, e.g., three times per day.

1.3 Centralized Marcive full dataload for e-government document records: . The TSPC previously approved a feasible technical model developed by FCLA, and this item continues being pursued by the PSPC.

1.5 Improve access to digital materials in Mango/Endeca: In August the Metadata subcommittee identified updating the CAGER guidelines to include both MARC and Dublin Core metadata as its top priority, and is working with the DISC subcommittee on this project. See also # 3.5 below and the separate Metadata subcommittee quarterly report attached.

3.2 Data cleanup activities in the local SUL catalog databases: Needed projects are being identified and posted on the TSPC swiki. In addition, FCLA has provided various new reports for the SULs, such as identifying obsolete OCLC record numbers which need to be updated, new Aleph call number and call number error tables, review of certain uses of 856 fields (URL links), and others.

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.

3.5 Metadata Subcommittee will establish a working relationship with the TAG DISC Subcommittee: The two groups continue to collaborate actively, e.g., on updating the CAGER guidelines as in # 1.5 above. Two working groups have been formed, one for MARC guidelines (Metadata) and one for Dublin Core (DISC), and a joint swiki has been created. See also the separate Metadata subcommittee quarterly report attached.

4.1 Participate in planning for a remote statewide storage facility: The TSPC has continued to keep abreast of the work of the storage facility task force. In addition, Ben Walker (UF), the chair of that group, gave a presentation and answered questions during the October 30 TSPC conference call. This was a very productive discussion and several issues where TSPC participation will be required were identified, such as the Aleph architecture for the records for the materials that will be relocated, maintenance of the records, institutional statistics, etc.

6. Authorities Subcommittee

The Authorities Subcommittee is submitting a separate report.

7. Metadata Subcommittee

The Metadata Subcommittee is submitting a separate report.

Respectfully submitted,
Dan North (UWF), Chair