

**Council of State University Libraries  
Public Services Planning Committee**

Quarterly Report: August 2007

This report includes discussions and activities from PSPC and PSPC subcommittees from May through August 2007.

Information Items

**1. Public Services Planning Committee**

Rebecca Bichel, FSU, and Phyllis Ruscella, USF, co-chaired a 1.5 hour discussion of documents issues, particularly related to the SUL selective depositories, on Friday, August 17, 2007 at the University of Florida. The “Documents Summit” was held at the end of a daylong celebration of the 100<sup>th</sup> anniversary celebration of the University of Florida as a land-grant college regional depository. Attendees discussed current issues in managing selecting depository collections. They discussed the impact of a proposed shared storage facility on current and future documents weeding projects. Ideas for cooperation in management of documents legacy collections were shared.

**2. Circulation and ILL Subcommittees**

The ILL and Circulation Subcommittees held a joint meeting at the UCF Rosen Campus in Orlando on August 3, 2007. Each SUL has been asked to review the “Library Systems Sales Agreement Between 3M and FCLA” and determine local interest in purchasing a 3M self-checkout. Most likely, testing will not begin until Spring 2008. Members of the Circulation Subcommittee have actively tested Aleph v.18 and Endeca patron features and gave valuable feedback. The Unmediated borrowing taskforce has created a blog and is currently discussing the desired end result. They have been contacting other institutions that use Aleph to find a library that uses it for unmediated borrowing. The task force intends to have a report by October for the group to review before the December CSUL meeting. The subcommittee conducted a survey of SUL’s ILL policies, procedures, and workflows. Results will be presented after analysis is completed. An informal poll found that UCF is the only SUL that receives their fines. (The full report is attached.)

**3. Information Literacy Subcommittee**

This subcommittee has not met.

**4. OPAC Subcommittee Leadership:** Five of the six Phase I and Phase II schools are now successfully using Endeca as their primary catalog. (FAMU has elected to use Aleph v.18.) The subcommittee continues to meet weekly with FCLA by conference call to progress on identified priorities. The subcommittee is to be congratulated for their outstanding ongoing work on behalf of all SULs. (The full report is attached.)

Respectfully submitted,

Rebecca Bichel  
Chair, Public Services Planning Committee  
August 24, 2007

**State University Libraries of Florida  
Public Services Policy Committee  
Joint Circulation and Interlibrary Loan Subcommittees Meeting**

**August 3, 2007  
UCF – Rosen Library  
9:00 AM – 4:15 PM**

**Attendees:**

FAMU	Priscilla B. Henry
FAU	Teresa Van Dyke
FCLA	Jennifer Kuntz
FCLA	Jean Phillips
FCLA	Joshua Greben
FGCU	Geraldine Collins
FIU	Douglas Hasty
FSU	Velma Smith
FSU	Bridgett Turnipseed
UCF	Kristine Shrauger
UF	Lori Driscoll
UF	Michelle Foss
UNF	Robb M. Waltner
USF	LeEtta Schmidt
USF	Merilyn Burke
UWF	Lisandra Carmichael

**1) Status of Aleph upgrades (FCLA, UNF, UF, UWF)**

FCLA highlighted the upgrade blog – available through <http://www.fcla.edu/libraryservices/aleph/upgrade.html> with Aleph password (currently, Aleph password authentication isn't working so you must use TRAIN TRAIN). UNF, UWF, and UF provided suggestions about testing on Sunday, having institutional checklists of what needed to be done by whom ahead of time, and coordinating communication amongst departments such as Systems, Circulation, etc. The FCLA testing checklist was very useful, but it was suggested that the "functional testing" part be moved to the beginning. There were also suggestions that FCLA will incorporate for the next round of settings to check for printing. FCLA noted that they felt patron empowerment issues had been resolved in Endeca, but they hadn't yet thoroughly tested the process. When asked about the accuracy of Aleph statistical reports, it was suggested that Arrow reports be compared to Aleph reports.

**2) Priority enhancements for Aleph V18 Circ**

There are numerous new options available in v18; Jennifer presented an overview and we discussed our mutual priorities. From that discussion, the following list emerged:

- Emailing holds
- Self-check
- HTML print (which is also related to receipt printing)
- Advanced booking (open problem ticket with Ex Libris)
- Arrow data warehouse for more robust reports relating call numbers and circ data
- Other items of interest but not top priority include:
  - Photo IDs included in patron files
  - SUL shared patron database
  - Settings to be open 24-hours
  - Cash transfer to show credits and payments done through University Financial Services and also recalling transferred charges
  - Setting up the circ logger reports
  - Sending hours via the "Open Hours" feature in v18 TEST
  - Offering different types of request forms via the OPAC
  - Removing item statuses when item circulates

For more detail about what's new, see the documentation on the web site (URL above). We tabled discussion of self-return/receipts via patron card swipe until the next Circulation Subcommittee conference call.

### **3) Implementing self-check (FCLA)**

Jennifer distributed copies of the "Library Systems Sales Agreement Between 3M and FCLA." If 10 machines are ordered, we will receive a 13.6% discount. Each institution should review the document and determine whether or not they can commit to ordering a machine within 12 months of the agreement. FCLA ordered a table top unit for testing two months ago and haven't received it. Most likely, testing will not begin until Spring 2008; University of Maryland is using it successfully with Aleph version 18. Each institution would need to troubleshoot the typical local networking issues (such as working around firewalls). The group asked whether or not FCLA equipment money could be spent on this purchase. Other details that need to be determined are how we'd handle yearly fees for maintenance and the SIP2 license.

### **4) DLLI Service (Diana Sachs-Silveira, TBLC)**

Since there no longer exists a "Distance Learning Library Initiative," the name of DLLI has been changed to "Florida Library Network Statewide Ground Delivery Program." This reflects the fact that all Florida libraries that are members of FLIN are eligible to participate in the program, which provides pickup and delivery of interlibrary loan materials to 225 libraries throughout Florida. LSTA grant funding is used to supplement matching

funds paid by the participating libraries (SUL costs are paid by FCLA). For a 5-day/week arrangement, libraries pay \$3000 (fuel charges increase this amount next year). Based on payment and delivery statistics, the average cost per book is \$2.82. There is no tracking system nor support to implement one. Although 5-day/week stops should have a 72-hour turnaround time, this was not the experience of ILL librarians at the meeting. UF and FSU, in particular, had problems with drivers not sorting materials and regularly leaving other libraries' materials – essentially making those units the default “regional sorting” facilities. There are seven hubs for sorting:

1. Gainesville
2. Tampa
3. Orlando
4. Miami
5. Jacksonville
6. Tallahassee
7. Fort Meyers

They delivered approximately 526,000 items last year and only paid for 49 lost items. SUL librarians noted that TBLC often refused to pay after 30 days or if it could not be determined which vendor lost the item (before sorting facility or after). Since there is no tracking, it is difficult to prove where the item was lost. (A suggestion from a member of the committee to pre-sort for SULs was not supported.) There is also a \$100 limit per invoiced item. Diana had not heard of many of the issues and encouraged schools to report problems via the web, phone, or email as soon as possible. Diana can be reached at [sachsd@tblc.org](mailto:sachsd@tblc.org).

Specific information about policies, procedures, reports, and statistics is available at the web site: <http://www.tblc.org/delivery/>.

Kristine provided copies of her ILLiad “cheat sheet” for printing labels.

### **5) Unmediated borrowing taskforce update**

The task force has a blog available on the FCLA site. Their current discussion is about “what do we want the end result to look like” and presented a packet of examples of different systems they have reviewed. Robb and Kristine will be contacting sites and asking questions. It has been difficult to find an institution that is using Aleph for unmediated borrowing. Robb found that SUNY uses ILLiad. Lori also noted that the University of South Carolina locations all use a shared server system in ILLiad. CSUL is forming a Technology Advisory Group (TAG) of systems representatives; this might be an appropriate group with which to consult once specific examples have been identified. The task force intends to have a report by October for the group to review before the December CSUL meeting.

## **6) ILL guidelines taskforce update**

The task force revised the guidelines and would like approval to send the draft forward to PSPC. There were a few suggestions that will be sent to Doug via email and incorporated into another draft for our review by October.

## **7) ILL Survey results**

An overview of the results of the ILL survey to gather information about the policies, procedures, and workflow of SUL ILL/DD departments were presented. Committee members asked for the raw results to be sent and Kristine agreed to send those to the list.

The results led to a general discussion of ILL practices including policies and practices for RUSH requests, loan periods, and invoicing practices. There was an interest in discussing invoicing in the future.

A question about the 7.2 ILLiad upgrade led to a general discussion of encouraging Odyssey use among SULs. Infotrieve is no longer supporting Ariel and the general consensus is that we should start preparing for the day when Ariel can't be used with Vista operating systems. There was a consensus that Odyssey enhancements should be a priority for Atlas.

At the end of the survey results document, some goals for the ILL subcommittee were listed; a few need discussion and coordination with the Circulation subcommittee such as mediated borrowing and loan periods. The ILL subcommittee would like to conduct a DLLI turnaround evaluation in November.

It was questioned whether the original agreement of reciprocal ILL for distance learners should be revisited since so much has changed in the past 11 years: DLLI no longer exists per se, CSUL philosophy has changed, ILL technology and service has changed, distance learning programs have changed. No consensus could be reached in the limited time remaining for the meeting.

## **8) Fines policies**

Although we didn't have time to discuss this item, during a break an informal poll was conducted to see who received their fine money back from the University. Only recently has the University of Central Florida started receiving that money, and it coincided with them beginning to accept payment for fines directly at the library. No other institutions receive that money back directly.

## **9) ILLiad and LDAP authentication at UNF**

Robb reported that he will be testing this and will report on the next ILL Subcommittee call.

**Meeting adjourned.** (The next meeting will be determined via discussion with joint committees next spring. It was suggested last year that we consider moving the venue; both UF and USF offered to host at that time.)

## PSPC OPAC Subcommittee Quarterly Report

Submitted by:

Nancy Cunningham, Chair

USF Representative

August, 2007

The subcommittee has been meeting weekly with FCLA to develop and improve Endeca and get it ready for launch in the fall. Over the last quarter, there have been many stress tests and modifications. The following is a chronology of significant events and developments since June.

### June

- New hardware installed to improve Endeca load capacity after earlier stress test failure. Second load test failure. More work is done on the configuration of the servers.
- Usability results released on Endeca. Overall positive feedback.
- 6/28 stress test is not successful.

### July

- Subcommittee decided in favor of abandoning ENDECA development temporarily to develop out of the box Aleph v.18 OPAC for roll-out in the fall.
- SUL deans and directors meet and decide in favor of doing minimal modifications to “out of the box” Aleph v.18 OPAC to achieve a look similar to v.15.5. OPAC subcommittee is charged with this task. Rollout for Group 1 libraries is pushed back to July 30<sup>th</sup>. All other libraries launch as scheduled originally.
- Subcommittee members work on making modifications to v.18 OPAC with FCLA and FCLA continues to work on test load configuration for Endeca.
- 7/16 Endeca stress test successful: The test had 95 people, 4,231 requests to Endeca in 10 minutes. A little over 7 hits per second. Our busiest hour on Aleph last fall was 7.8 hits per second. 77% of the requests arrived at the Endeca server when there was no queue. Of the 23% requests, that had to wait, the average wait time was about 3 seconds. The overall average response time (at the Endeca server) was 1.1 seconds.
- 7/23 Endeca stress test successful: About 310 people searching. The first 10 minutes were busier than the full 15 minutes. 9597 requests to Endeca, just under 16 hits per second. Just about double the Aleph peak from last fall.
- Group 1 libraries (UWF, UNF, and UF) roll out Aleph v.18 OPAC because of patron empowerment problems in Endeca.
- Subcommittee prioritizes issues into tiers 1, 2, and 3 to guide Endeca development.

### August

- Subcommittee continues to work with FCLA on Endeca development. Group 1 rollout of v.18 is successful.
- Tier 1 “show stopper” issues are resolved.
- Subcommittee re-prioritizes issues into new categories.
- 8/16 meeting report out by members indicate all libraries except FAMU intent to launch Endeca as their primary OPAC in the fall.
- 8/17 Stress test successful: FCLA states: The stress test results looked very good again. We were only running 5 servers as opposed to the usual 6. This was due to the increased index size while schools are running on different Aleph versions. There were 179 people,

5668 requests to Endeca, 6.319 requests per second. The average response time at the server was 1.3 seconds. The slowest response time at the server was about 30 seconds. The percentage of searches that took over 5 seconds was about 6%. This percentage will improve once we can run 6 servers again.