University of Maine System and URSUS

**Library Directors’ Council**

at Bangor Public Library

**Friday November 17, 2006**

**Meeting Notes w/ URSUS report**

URSUS Manager’s Report at end of these notes.

**Attending:** Tom Abbott, Joyce Rumery, Sharon Johnson, Greg Curtis, Steve Podgajny, Frank Roberts, Marianne Thibodeau, Susan Lowe, Barbara McDade, and Karl Beiser

**1.**     Steve Podgajny, Director of Portland Public Library was welcomed to the URSUS Directors’ Group and had a chance to provide a brief overview of his background

**2.**     No additional changes on the meeting notes from our October meeting

**3.**     Indexing 650\_1 field in URSUS: See Jonathan’s report for more detail. LC is giving up maintenance of authority records for these materials and we need to decide how to best create an authority review process –REFERRED to Cataloging Standards Committee for review and recommendation

**4.**     (Part I) LibQUAL Survey Update: Tom waiting for David to review the draft Human Subjects Protection waiver/exemption that Tom has created for USM’s IRB to review. USM is being asked to approve the waiver/exemption for all UMS Libraries allowing delivery of the LibQUAL survey.  All Directors are asked to brief their campus IRB chair as to the process and to expect a formal letter outlining the process in the near future.

(Part II) There was agreement on the following local questions for all campus libraries:

·       Teaching me how to locate, evaluate and use information

·       Adequate and convenient hours of service

·       Timely document delivery

·       Help when and where I need it

·       Comprehensive collection of full-text articles online

·       URSUS, the online catalog is user-friendly for finding books

(Part III) Logistics:

·       Incentives: each campus will manage its own incentives, and marketing except for common posters

1.     Question as to incentive funding by campus?

2.     Suggestions: Am Exp gift cards, IPODS, Bookstore certificates, Copy cards

**5.**     Recommendation on Readers Guide to Periodical Literature: Tom asked for advice on moving from paper version of RG to online retrospective collection – all agreed that if funding were available that it is preferable (UMA – estimate: $9000 to purchase then maintenance.  Deb Rollins was asked to obtain quotes for UMA alone, then UMFK, UMPI, BPL and PPL – individually and as a group. Thanks for the help Deb.

**6.**     Cooperative collection development: all agreed to invited OCLC representative to meet with us in December (2 hours) to discuss the functionality, value and cost of using their software and support to evaluate overlap among our UMS and public library collections – David will invite her.

**7.**     Problems with community patrons: Frank asked others how they handle disruptive patrons – each director shared his or her thoughts and all suggested beginning with something like, “that behavior is not acceptable for the library, please stop.”  With possible warnings related to losing privileges, and/or calling security or the police. Finally, all agreed that calling security or the police for help is the best method when verbal warnings don’t work. One library electronically limits community patrons to 60 minutes of computer time in any 24 hour period --

**8.**     Holds on checked out materials:  A report from the circulation heads meeting indicated that there was a misunderstanding about how a “title hold” on a checked out item would work – concern was raised that at the time of renewal, a researcher would find that he/she had to relinquish the material because a hold was in the file waiting for the item to be returned – THAT IS NOT THE CASE: the correct name for this function is “title priority paging.”  While Karl can better explain it, here are the basics: The hold is indeed placed at the title level which is critical for the non-academic libraries – allowing a much broader opportunity for the requestor to obtain an item sooner.  However, title priority pagingretains the hold and sends a paging slip every time the correct title is check in at any participating library – that library (where the researcher wants to renew the item) can chose to ignore the paging request and/or reply to it.  Given this better explanation of the process, the directors have asked Karl to attend the next Circ Heads meeting to explain and review the process with them. It is the intention of the directors that title level holds will be implemented for the start of the spring semester 2007 – with embedded title priority paging as the method of implementation.

**9.**     **Blackboard (Bb) link to Libraries:**is now functional on all Bb templates

**10.**  **Maine InfoNet:** Karl reported that John Forest from BPL was hired into Karl’s former position at the State Library (Maine Info-Net) As Library Systems Manager/Agency Technology Officer.  The Maine InfoNet Board met recently and began work on: their top priorities: Marketing, Universal Access, and new digital projects programs and the supporting the legislative library agenda is also on everyone’s radar screen already.  Finally a thank you to Ralph Caruso and the System Office for their support with the new server, and fleshing out the URSUS budget as it was requested.

**11.**  **Library Assistants III:**Susan reported that she and David had met with a portion of the group who agreed to review the idea of creating a new System-wide Library Assistant III position. Numerous job descriptions have been reviewed.  A draft description will be presented to the directors at the December meeting – Thanks Susan and David

**12.**  **Delivery Service:**A new company (Velocity Express) has taken over the courier service and our contact is David Libby who helped create the original service we hired. They have promised and are already improving services -

**13.**  **URSUS Update:**See Jonathan’s report that is attached – see especially the Google Custom Search Engine – which begins to act like a federated search engine --

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**LIBRARY DIRECTORS’ ITEMS FOR THE YEAR –**this is the beginning of the year’s agenda – feel free to edit as needed

·       Fine policy for future

·       LibQual – ongoing

·       Decision on continuing Docutek

·       Career ladder system for MLS librarians – system-wide

·       Library Assistants III for support staff – sent to committee

·       Cooperative collection development consistent with goals of UMS Strategic Plan

·       Analyzing “avoidable” collection duplication

·       library buying items to be shared instead of each purchasing them, and/or,

·       sharing campus library purchase funds to purchase shared central database or single item to be shared

·       Last copy center if possible and if not – planned sharing via cooperative collection development

·       Digitizing bound publications where we control copyright

**THIS YEAR’S MEETING SCHEDULE:**

All at Bangor Public Library – scheduled as follows:

            December 15

            January 26

            February – NO MEETING

            March 9

            April 13

            May 25

URSUS System Report

Presented to URSUS Library Directors

November 17, 2006

1.  **URSUS Server upgrade** -- We have ordered migration services from III for the period between the 2nd and 10th of January.  As of this writing, we do not have a firm date for the migration, but we hope to have one quite soon.  UNET will be providing and installing this server for us.  The server will be a Dell PowerEdge 2950 with 2-way dual core processors at 2.33 Ghz and 8Gb of RAM running on the Linux operating system, which is a change from the Alpha platform currently in use by the URSUS server.  UNET is aware of the timeline for the upgrade, and is able to make our server available in time.

2.  **Indexing 650\_1** --  URSUS does not currently have the 650 field with the second indicator 1 indexed in the subject index.  This means that LCSH subject headings for children do not show up in subject searches.  This has been the case since we initially moved to III's ILS, as the decision was made not to index them.  With the growth in the amount of children's material in our collections, there has been interest expressed in indexing these headings, as well.  The cost for this service, as quoted to me on November 6, will be $1500.

3.  **Title Level Holds in OPAC** --  I brought up the decision to move to title level holds in the OPAC at the Circulation Heads meeting on November 3rd.  This led to a lively discussion in which several participants indicated a strong disapproval of this plan.  The objection appears to be less about title-level versus item-level holds as it does about holds on checked-out items at all.  While several URSUS libraries already have circulation models where patrons can place holds on items through the circulation or reference desk, several URSUS libraries do not permit such holds at all.

The vocal opposition to this change should not necessarily be interpreted as universal opposition.  Several circulation departments had no objections to the change, and at least one was very much in favor of it.  This is, unfortunately, an area where setting policy on an institution-by-institution basis is not practical.  Given the fact that different members of the consortium have different, even opposing, needs with respect to this policy, it is important to realize that some compromise must occur, regardless of the way the policy is set.  I believe that the decision to move to title-level holds is the best one, but we do need to address the concerns of those who oppose the change.  I recommend that the directors speak to the circulation heads at their libraries to address the concerns that they have.  Many of these concerns may be best addressed with a policy change, such as extending the default loan periods to take into account that an automatic renewal is no longer taken for granted.

4.  **Custom Search Engine Pilot** – We have recently proposed to the Maine InfoNet board the implementation of a custom search engine that will be able to search all of our locally held digital library resources, including URSUS records, as well as other resources throughout the state.  This application would not be an implementation of Federated Searching, but rather an application that indexes all of these resources in the same index and then allows searching directly in that master index.  This removes the dependency on the search function provided by the original resource, whether it be an ILS or other kind of database, which is a major flaw federated searching.  We are currently exploring the time involved in putting this project together.  An excerpt from our report to the Maine InfoNet board is included here.

            Google has just announced the availability of the “Google Custom Search Engine (CSE) which is a way to make your own version of Google Search, one that includes only the content / sites that you specify. (…”a federated search engine for web pages.”) e.g. many libraries and campus web sites use a Google search engine.  CSE enables one to customize up to a point: it only indexes static web pages; it cannot search databases in MARVEL or Indexes and Databases; it cannot search MaineCat.

However, Google CSE (or other aggregator search engines) could include all metadata from our library catalogs, digital collections and selected open-access electronic resources, if we output the metadata and create an index.  North Carolina State used a similar approach in its implementation of Endeca, which, like Google, is a tool for creating and searching indexes.  Similar open source or inexpensive tools such as Lucene or Zebra would allow us to compile data from a number of sources, index it, and offer a single search option.

The primary drawbacks of this approach are: much of the material we would like to include in the indexing, i.e., journal literature, cannot be integrated into the master index. Secondly, developing and maintaining a customized search engine system requires startup and ongoing maintenance costs in staff time, software, and hardware.

5.  **Advanced System Access and Administration Training** -- I recently completed III's Advanced System Access and Administration training in Emeryville, CA.  This training gives me permission to edit and configure several advanced features in URSUS, including request rules, suppression rules, and advanced printer configuration.

6. **Portland Public Library** – Jen Alvino from PPL was present at the most recent Circ Heads meeting and provided a very helpful and welcome voice in the discussions.  I will be meeting with Sarah Campbell and others from PPL on the 28th of November to address some of the issues involved with their move to URSUS.  Our hope is to bring them onboard sometime in the mid- to late-spring.

7.  **URSUS Requests through InnReach** -- Louise Hinkley of the Maine State Library and I discovered that the problem of InnReach requests from within URSUS not being handled properly is due to the fact that some libraries are still using the Telnet interface to handle InnReach requests.  Everyone must use Millennium for InnReach transactions to function properly.  The telnet interface to URSUS is no longer supported, so library staff should use Millennium for all functions wherever possible.

Submitted 11/16/06 by Jonathan Williams