UBorrow is Live!

UBorrow went into Production as of March 1, 2011. This is a “soft launch”, meaning the service is fully functional but not being marketed to patrons. Even so, as of May 22 the UBorrow link has been clicked 5,624 times. Of those requests, 4,022 were directed to Aleph while the remaining 1,602 went straight into ILLiad. See page 12 for more on UBorrow.

DAITSS 2 is LIVE!

The Florida Digital Archive (FDA) went into production with DAITSS 2 on April 22, 2011. DAITSS 2 is a completely re-architected and re-written version of DAITSS that is easier to implement, maintain, and operate. FDA Affiliates can take advantage of the new graphical interface to submit single packages and to view the status of their own packages. Future enhancements will allow Affiliates to update their own account information and make their own Dissemination and Withdrawal requests. See page 9 for more on DAITSS.

Mango Discovery Tool

In March 2011 FCLA introduced the new Mango Discovery Tool, a single user interface combining article searching with catalog searching. By late April the Mango Discovery Team was able to demonstrate compatibility with 3 of the major proprietary mega-indexes:

◊ Serials Solutions’ Summon
◊ EBSCO’s Discovery Services (EDS)
◊ Ex Libris’s Primo Central Index (PCI)

This flexibility enables each university library to choose the mega-index that best fits their e-resource collection and budget. Understanding the content of each index is a very important part of the Mango Discovery project. See page 6 for more on Mango.
The primary administrative activities this quarter have been tasks connected to legislative issues. FCLA administrators worked with the Board of Governors (BOG), the UF Provost and the UF lobbyist assigned to library issues. The UF lobbyist, BOG staff, and Florida College (FCS) staff, with the leadership of the BOG and FCS Chancellors, were able to convince the legislature to give the Task Force on the Future of Academic Libraries a chance to plan the future of library automation for public higher education in Florida instead of having that future dictated by the Legislature. Although the legislature gave the planning assignment to the Chancellors of the university and college systems, it was with the understanding that the assignment would be passed on to the Task Force. The Task Force received the assignment on Friday, May 20. The specific charge from the Legislature (from SB 2150, Section 48) states:

By January 1, 2012, the Chancellors of the State University System and the Florida College System shall submit a plan to the Executive Office of the Governor and to the legislative appropriations committees for establishing a joint library organization to address the needs of academic libraries in the State University System and the Florida College System that replaces the Florida Center for Library Automation and the College Center for Library Automation. The plan must include, but need not be limited to, the following components:

1. A proposed governance and reporting structure for the joint library organization.

2. Recommended staffing for the joint library organization, which includes roles and responsibilities.

3. A recommended process and schedule for the acquisition of a next generation library management system and its associated services which includes a discovery tool provided by the joint library organization. The library management system will replace the current systems and services provided by the Florida Center for Library Automation and the College Center for Library Automation. The process for acquiring the next generation library management system must involve the identification of the functional requirements necessary to meet the needs of the postsecondary education library users and be scalable in order to meet any additional library user needs that are identified as being necessary and in the best interest of the state.

4. A proposed schedule for consolidating the computing and data center resources and equipment provided by the Florida Center for Library Automation and the College Center for Library Automation to a statutorily established or designated primary data center no later than December 1, 2012, or for decommissioning the computing and data center resources and equipment that are no longer required by the joint library organization and are currently located at and managed by the Florida Center for Library Automation and the College Center for Library Automation.

5. A proposed operational budget for the joint library organization which is more cost-effective than separately funding both the Florida Center for Library Automation and the College Center for Library Automation.

6. Proposed substantive and fiscal policy changes needed to implement the joint library organization.

7. A timeline and implementation strategies for establishing the joint library organization.

Additionally within the same bill (Section 7) the following language is included that modifies the statute requiring cooperation in the joint licensing of electronic resources:

The chancellors and vice chancellors of the Florida College System and the State University System shall annually report to the Executive Office of the Governor and the chairs of the legislative appropriations committees the cost savings realized as a result of the collaborative licensing process identified in this section.

Continued on page 4.
Training

Training Summary

FCLA staff conduct formal training sessions with general or customized content, hold informal “office hours” when library staff can bring up questions and problems, and do a large amount of one-on-one consultations. Below is a training summary for FY 2010/2011 listing all formal sessions and a selected handful of consultations.

Aleph Acquisitions

◊ 1 new user training session for FIU Medical Library staff in November.
◊ 2 EDI training sessions: FAMU in February, FIU in May.
◊ 1 training and demo session on Aleph and Arrow reports at UCF in April.

Aleph Cataloging and Authorities

◊ 3 customized training sessions for UWF in September, October and January.
◊ 1 global change training session for NCF in October.

Aleph Circulation

◊ 3 functional training sessions for UF HSCL in August and April.
◊ 3 functional training sessions for UF, FSU, FIU, FGCU & USF.
◊ 2 circulation reports training session with FAU Treasure Coast campus in September and FGCU in May 2011.
◊ 1 Selfcheck training and setup visit to USF-ST. Pete, May 2011.
◊ 1 Advanced Booking training session for UNF in July.
◊ 1 Advanced Booking Elluminate demo for the SULs in October.

Aleph Course Reserves

◊ 1 functional training session for FAU Treasure Coast campus in October.

Archon

◊ 2 functional training sessions with FSU in March and FAU in November.

DigiTool

◊ 7 customized functional training sessions: FAU in February, Wolfsonian-FIU in March, FAMU in July, March and April, Ringling Museum in December.

Elluminate

◊ Weekly office hours from October 2010-December 2010, and January 2011-February 2011

OJS

◊ 3 training and/or demo sessions: FSU in March, UF in January, and FAU in December.
◊ 1 preliminary demo and discussion with UNF.

UBorrow

◊ 7 orientation sessions with UCF, UF, FSU, USF, FAU, FIU, UNF from June - September.
◊ 10 implementation kickoff sessions with FAMU, FSU, NCF, USF, FIU, UWF, UF, UCF, UNF, FGCU from October - November.
◊ 12 functional training sessions with FAU, FIU, UWF, FSU, FAMU, USF, NCF, FGCU, UF, FAU Treasure Coast campus, UCF and FAMU Law from December - February.
◊ 4 interface overview sessions for library staff via Elluminate in February (recording provided)
◊ 2 IT support overview sessions for library staff via Elluminate in February (recording provided)
◊ 2 in-person follow-up sessions in December and March.
◊ 2 follow-up sessions for library staff via Elluminate in April.
◊ 2 Reports and Statistics overview sessions for library staff via Elluminate in April.

Instructional Consulations

◊ FSU: using Aleph Monograph Claiming reports and services.

Continued on pg. 4.
Training Continued

◊ USF: setting up the LabelPRNa program for use with networked printer
◊ UF: using Aleph search to create a set of HOL records for later processing with global change
◊ UWF: using ARROW ‘Active Serial and Standing Order Lists’ Reports
◊ USF: how to modify a GenLoad profile
◊ FAU: using a MARC record loader to correct a defective file before loading with GenLoad
◊ UWF, FAMU: how to use Aleph global change to correct cataloging records
◊ UF: using the Aleph Acquisitions Report ‘List of Orders per Budget’
◊ FAMU: how to extract records to be sent to Coutts/Oasis
◊ UNF: using Aleph and ARROW Budget Management Reports
◊ FIU: using Aleph Acquisition General Retrieval Reports
◊ UWF: using the new E-Resource reports with the statewide commonly defined Aleph Object Codes and Material Types
◊ UCF: using the Aleph custom service to load object codes after running EDI Ebsco invoices.

Planning and Administration Continued

Legislative Updates - 2010

◊ FLA-PASS: ready to go live as soon as the appropriate Regulation is passed by the Board of Governors.
◊ Virtual Union Catalog - Search Florida Libraries includes College, University and State Library records. Not sure if this service will need to be further enhanced.
◊ Data Center Consolidation - all planning documents submitted. Revised instructions in 2011 proviso.
◊ Access to K-12 union catalog - in process at CCLA.
◊ Core E-resources - have been defined and a process is being developed for College libraries to license 4-year core from FCLA and University libraries to license 2-year core from CCLA.

Digital Collections

◊ The migration of all PALMM content from DLXS to DigiTool was completed in April.
◊ Digitool Service Pack 3-01 was installed in test and production on March 28 and April 25 respectively.
◊ Many improvements were made to our Florida Online Journals (FloridaOJ) service including a custom “About” page, a custom “Current” link, and the addition of journal logos to the front page. All scholarly journals previously made available by FCLA in DLXS were migrated to the Florida Online Journals (FloridaOJ) platform. These include The Florida Entomologist, Insecta Mundi, The Journal of Nematology, Nematologia Mediterranea, and Nematropica. http://journals.fcla.edu

Many improvements were made to our Florida Online Journals (FloridaOJ) service including the addition of journal logos to the front page.
Cataloging and Authorities

The Library of Congress Authority file is now current for name as well as subject and series headings. The last file in the backlog of weekly LC name authority update files was loaded May 10. On May 12 the weekly name update was loaded on the same schedule as the subject and series updates. This is the first time since migration to Aleph that all the LC weekly update files have been loaded as received. Background: LCA10 is the resource file shared by all eleven universities. Sharing the resource file precludes having to store separate copies of LC authority records in each university’s Aleph.

In this quarter, Cambridge Psych Ebook records were loaded into production Aleph for FAMU, UF, and UNF; and into test Aleph for FIU and NCF. The records were loaded for FAU, FGCU, FSU, UCF, USF, and UWF in previous quarters.

Acquisitions and Serials

◊ Updated Aleph to include additional statewide E-Resource Object Codes and Material Types for reporting E-Resource material encumbrances and expenditures. Currently 10 of the 11 universities participate in the CPC initiative for the use of commonly defined Object Codes (Payments) and Material Types (Orders) for E-Resources.
◊ Worked with UF Acquisitions and Cataloging staff to adjust workflow and custom services for adding virtual bookplating to Aleph holdings records.
◊ Had a conference call with FIU staff about creating an informational spreadsheet for sharing of statewide information on EDI (Electronic Data Interchange). The spreadsheet will give a comprehensive list for Acquisitions staff about which institutions are using EDI and with which vendors.

Circulation

◊ Set up new item statuses, with appropriate circulation policies so that iPads and Kindles could be circulated for FIU’s new E-Reader Project.
◊ Ran global changes to modify items from one item status to another for UF and UWF so that items with conflicting circulation policies were managed by the correct circulation policy.
◊ Tested modified patron load files for FAU to include new medical students and personnel.
◊ Tested modifications to FIU bill / fine file to include PantherSoft item types in the Aleph description, with the goal of providing more detail to patrons regarding their library charges.

Upgrade to Version 20

FCLA has been preparing a development server environment for the initial steps in the Aleph upgrade process. In addition to testing the version upgrade procedures from v.19 to v.20, we are testing the upgrade of Oracle 10.2 to 11.2 and our Red Hat Enterprise Linux from RHEL4 to RHEL5. We have requested the Aleph Installation Kit from Ex Libris. After the planning, coordination, and upgrades of Aleph, Oracle and Linux are complete on Dev, we will then move the process to our Test environment. We are hoping to upgrade Production this summer, either the end of July or beginning of August, but will have to wait for testing and timing results.

Clients

Because of changes made to the clients due to the UBorrow soft launch and Service Pack updates to Aleph, all institutions received repackaged clients for the production, test and report environments. These clients are repackaged to pick up relevant changes, archived, then put in place so that SUL staff can access them via the FCLA website. All changes to Clients are documented on FCLA’s Client Management page for later reference.
The Florida Center For Library Automation

Mango Booking Availability Matrix

The new Booking Availability Matrix feature successfully went live at UF on March 31, 2011. Students who log in can place a reservation for study rooms. Between March 31 and May 31, there were 4,008 2-hour bookings made, with 3,554 of those bookings actually used.

New Data Feeds

FCLA is working with UF staff to load bibliographic records from both the HathiTrust and ERIC directly into Mango, bypassing Aleph. These loads will be completed in Test and made discoverable in the UF and Union Catalogs. Each SUL can decide if they want these records in their own catalog.

Study Room Reservation Service

<table>
<thead>
<tr>
<th>Room Choices:</th>
<th>Choose a Specific Day:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group: Study Rooms - Library West</td>
<td>ALL DAYS</td>
</tr>
<tr>
<td>Home Media Production Studios: Library West 3rd Floor</td>
<td></td>
</tr>
<tr>
<td>Video Conferencing: Library West 2nd Floor</td>
<td></td>
</tr>
<tr>
<td>Group: Study Rooms - Education Library</td>
<td></td>
</tr>
</tbody>
</table>

There are 14 Rooms to choose from:

<table>
<thead>
<tr>
<th>Room</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>142</td>
<td>available</td>
</tr>
<tr>
<td>219</td>
<td>available</td>
</tr>
<tr>
<td>220</td>
<td>available</td>
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<td>222</td>
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<td>401</td>
<td>available</td>
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<tr>
<td>405</td>
<td>reserved</td>
</tr>
<tr>
<td>415</td>
<td>available</td>
</tr>
<tr>
<td>417</td>
<td>reserved</td>
</tr>
</tbody>
</table>

Mango Google Calendar

Added the ability to save UBorrow due dates to your personal Google Calendar, by clicking in the calendar icon next to the date.

UBorrow Items On Loan

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
<th>Loan Status</th>
<th>Location</th>
<th>Due/Due-Called</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forgiveness and reconciliation: religion, public policy &amp; conflict transformation.</td>
<td></td>
<td>Loaned to Patron</td>
<td>LIBRARY WEST</td>
<td>06/09/2013</td>
</tr>
</tbody>
</table>

Mango/ILLiad/Aeon Integration

Mango/ILLiad/Aeon Integration enhanced the functionality of Mango requests for material by adding bibliographic information that Mango sends to ILLiad for UCF and Aeon for USF Special Collections.
Mango Admin Module

FCLA staff shared this new development with the OPAC committee at their May meeting. This feature allows each library to customize its own Mango display, including the arrangement of facets, which side of the screen facets display on, what label is used, and optional Mango features such as including the HathiTrust link. This Module is available for testing and will be available for production once testing is completed.

OCLC Reclamation

OCLC processing and FCLA post reclamation reports are completed for the University of North Florida reclamation project. Florida Gulf Coast University has volunteered to be the next institution.

Elluminate Usage

<table>
<thead>
<tr>
<th>License</th>
<th>Sessions</th>
<th>Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSUL LICENSE</td>
<td>125</td>
<td>693</td>
</tr>
<tr>
<td>FCLA LICENSE</td>
<td>106</td>
<td>528</td>
</tr>
</tbody>
</table>
E-resource Access and Management Activities

E-Resource Licensing Activities

CPC and ERS Liaison Activities

Vendor/Publisher relations

Claire Dygert met with numerous vendors and publishers this quarter to stay abreast of recent developments and products, including Taylor and Francis, ProQuest, Lyrasis, and EBSCO.

SUS Shared E-book Collection Intent to Negotiate (ITN)

As FCLA Liaison to the CPC, Claire Dygert currently serves as the ITN Lead for the CPC’s Shared E-book Collection ITN. As ITN lead, Claire sets the agenda for and facilitates the meetings and deliberations of the ITN Evaluation/Negotiation Committee. Claire also acts as the communication bridge between UF’s Office of Purchasing, which is overseeing the ITN process, and committee members.

Collaborative Licensing Efforts

FCLA continues to provide leadership in building collaborative e-resource licensing efforts among institutions of higher education in Florida. Claire Dygert has been in discussion with Oxford University Press and Cambridge University Press to expand the SUS e-journal contracts with these publishers to include ICUF institutions in the participating libraries. On March 17, 2011 Claire met with the co-chairs of the ICUF Libraries Group at Stetson University to discuss these opportunities and to plan for the upcoming ICUF Libraries Group annual meeting May 19, 2011.

FCLA also continues to collaborate with CCLA, and held a May 12th conference call with CCLA to plan for cross-licensing activities for 2012.

Exploration of content in discovery tools

As part of the Mango Discovery Tool development, Claire Dygert has been researching how the content of the mega-indexes Primo Central Index, Summon, and Ebsco Discovery Tool are built and organized. Claire has worked with the content experts at ExLibris, Serials Solutions and EBSCO to gain an understanding of where the metadata comes from for each provider, and how it relates to the e-content already held by the SUS libraries.

Metalib

KnowledgeBase updates this quarter include:

◊ Several new ProQuest Databases
◊ Several new deGruyter databases
◊ Several New EBSCO databases
◊ Several new JSTOR databases
◊ Alexander Street Counseling and Therapy Videos
◊ US Department of Justice NCJRS Abstracts Database

Service Pack MetaLib 4.4.2 (released May 2011) was installed. The MetaLib COOP (backup) server was moved to a virtualized machine environment.

SFX Updates and Requests

The FCLA SFX/MetaLib group is experimenting with an SFX target created by the California Digital Library linking directly to fulltext in the HathiTrust. We are also continuing to work with library staff to test and implement improved SFX menu choices, such as adding options to link directly to full text, and using better display logic to determine which targets do and don’t display on the menu.

We worked with USF to implement new streamlined, less cluttered, menus, the templates for which are now available for any library to use. If any of these new features might be of interest to your library, please contact Elaine Henjum.

Work on targets is ongoing. A new customized target was created to match SUL subscriptions to Cambridge Journals. New KnowledgeBase targets this quarter include: Brill Online, EBRARY Academic Complete, and new EBSCO and GALEGROUP databases.

SFX Test and COOP (backup) servers were moved to a virtualized machine environment. SXF test is currently being upgraded to version 4; production and COOP will follow. There are no changes to the public display in version 4.
DAITSS 2.0, a total redesign and rewrite of the original DAITSS software, was moved into production on April 22. DAITSS 1 was written in Java, used a MySQL database, and was a single monolithic application. DAITSS 2 is written in Ruby, uses a PostgreSQL database, and is architected as a set of micro-services. For a detailed description of the goals of the DAITSS 2 project, the differences between DAITSS 1 and DAITSS 2, and the migration strategy adopted, see “DAITSS Grows Up: Migrating to a Second Generation Preservation System” by Carol Chou and Priscilla Caplan.

Digital Preservation intern Ilana Barnes began work with the Florida Digital Archive on May 9. Ilana is a student in the University of Michigan’s School of Information specializing in Library and Information Services and the Preservation of Information.

FCLA accepted an invitation to join the National Digital Stewardship Alliance, an initiative of the Library of Congress, National Digital Information Infrastructure and Preservation Program.

Quarterly Statistics

<table>
<thead>
<tr>
<th>Total holdings of the FDA as of May 23, 2011:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Packages: 286,321</td>
</tr>
<tr>
<td>Files: 38,993,795</td>
</tr>
<tr>
<td>Bytes: 86.6 TB</td>
</tr>
</tbody>
</table>

Ingest Breakdown by Account (for comparison with submitted data, these totals include only those files submitted by Affiliates and excludes additional files provided by the Archive):

<table>
<thead>
<tr>
<th>Breakdown of Packages Archived this Quarter by Account and Project</th>
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<tbody>
<tr>
<td>Action</td>
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<tr>
<td>--------</td>
</tr>
<tr>
<td>Archived DAITSS v1 and v2</td>
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<tr>
<td>TOTAL ARCHIVED</td>
</tr>
</tbody>
</table>
On Request

A selective listing of services FCLA has provided at the request of the libraries.

UCF - Reloaded the entire run of Florida Historical Quarterly from volume 1 no. 1 to volume 81 no. 4 to improve metadata and display. UCF staff provided a specification for correcting the bibliographic records and some replacement PDF files.

FSU - Loaded 9268 dissertations retrospectively digitized by ProQuest into FSU’s Historic Electronic Theses and Dissertations collection. The associated MARC records were loaded into Aleph/Mango and DigiTool, and provided with PURLs pointing to the online version. The ETDs are restricted to FSU campus use only.

UF - Worked on Aleph custom services and workflow for virtual bookplating of gift materials.

FSU - Assisted Acquisitions staff in using the Aleph claiming function.

UF - Created new custom Aleph service to retrieve a file of bibliographic record numbers from a file of OCLC numbers.

FAMU - Provided detailed information on disk space and storage used by FAMU for all their digital collections in DigiTool.

FSU - Created an OAI set to allow FSU’s “Civil War correspondence, diary, and related documents” collection to be harvested into the ASERL Civil War in the American South portal.

UF - Modified Advanced Booking hours so that no bookings were allowed during the library’s intersession, and recreated the schedule with updated Summer hours.

UF - Modified the UBorrow Arrival Slip so that it can be easily folded or cut and placed in a delivery sleeve to be held and easily identified upon the patron’s arrival.

UF - Created a notification to inform patrons that their study carrels had been automatically renewed.

FSU - Added a customized circulation Return Receipt for the Panama City campus.

NCF - Modified Circulation system checks to prevent requests for items that can’t be requested via UBorrow.

FAU - Corrected bad data in patron records that was preventing the records from being updated.

UF - Repaired a bad section of the word index with no interruption to Aleph services.

FSU - Deleted LC authority records with no local modifications from FSU’s local authority file in Aleph (FSU10). Many of these records were migrated from the previous system. Deleting them allows bibliographic records to link to the most current version of the LC authorities in the resource file maintained by FCLA.

FSU - Created a customized clickable DigiTool banner for FSU Libraries’ Digital Collections.

FAU - Created a customized clickable DigiTool banner for Digital Collections @ FAU Libraries.

FAMU - Worked with Ex Libris to correct a problem in the DigiTool display of browsable digital collections.

UF - Configured the Aleph approval order loader for new vendors: Casalini Libri (Italy) and Harrossowitz (Germany).

FAMU - Assisted with initial extract of recently published English language monographs to send to Coutts. Coutts will display FAMU’s current holdings in their Oasis database which is used for placing new orders.
Professional Activities

Professional

Ellen Bishop
◊ ELUNA (Ex Libris Users of North America) from May 11-13, 2011 in Milwaukee, Wisconsin. Served as Chair of the Acquisitions and Serials Special Interest Group.
◊ NISO Webinar “Patrons, ILL, and Acquisitions” March 9, 2011.

Priscilla Caplan
◊ Attended an invitational meeting of UDFR (Unified Digital Formats Registry) stakeholder group in Washington DC, May 13-14.
◊ Served on an IMLS National Leadership Grant review panel in Washington DC, May 2-3.
◊ Presented two papers, moderated a session, and co-taught a short course at IS&T Archiving 2011 in Salt Lake City, May 16-19.

Carol Chou

Claire Dygert
◊ Attended the ICOLC Spring Conference, March 20 – 23, 2011 in Austin, TX.
◊ Attended an ICN Negotiation Seminar, April 11 & 12, 2011 in Chicago, IL.
◊ Serves on the FACRL Board; appointed FACRL Treasurer for 2011/2012 at the FLA conference, May 5, 2011.

Daniel Cromwell
◊ ELUNA (Ex Libris Users of North America) from May 11-13, 2011 in Milwaukee, Wisconsin. Served as Chair of the Cataloging & Authorities Special Interest Group.

Wendy Ellis

Caitlin Nelson
◊ Attended a week-long ARL XML workshop in April in Washington, DC.

Jennifer Kuntz
◊ Attended OCLC Webinar “Introduction to OCLC’s Future Delivery Services” May 3, 2011

Lydia Motyka

Jean Phillips
◊ Completed term as Chair of the Aleph Product Working Group for ELUNA. Presented on the work of the PWG at the annual meeting in Milwaukee.
◊ Presented on various projects at FLA during the State University Interest Group session.

Community and Contributions

Heifer International

FCLA Candy Jar donations for Heifer International totaled $45.00 this quarter. FCLA staff have donated $2,335.00 to Heifer since 2003.

Bread of the Mighty food bank

FCLA donated 123 pounds of food, and enough cash to purchase 178 pounds of food, to the local food bank, The Bread of the Mighty.
UBorrow went into Production as of March 1, 2011. This is a “soft launch”, meaning the service is fully functional but not being marketed to patrons. Despite this, as of May 26 the UBorrow link has been clicked 5,879 times. Of those requests, 4,200 were directed to Aleph while the remaining 1,679 went directly to ILLiad.

The “full launch” is targeted for August 1, 2011, meaning UBorrow will be advertised and promoted to users at that time.

FCLA and the SULs have created something truly unique with UBorrow. Though other library systems have implemented AlephILL, no others have created a system quite as unmediated, or as customized, as UBorrow.

◊ Patron UBorrow requests and request management is entirely within the Mango Discovery user interface - no need for the patron to be redirected to the Aleph interface.
◊ There are no dead ends. UBorrow behavior depends on title availability within the SULs:
◊ directs patron to library shelf if available locally;
◊ submits request to AlephILL for unmediated routing to available suppliers;
◊ directs patron to ILLiad login with an OpenURL.
◊ UBorrow is configured for minimal staff intervention. Borrowing staff do not “touch” the request until the requested item arrives. On the Lending side, pull slips are generated only for loanable / available items; otherwise requests move to the next available supplier.
◊ Workflows and policies are customizable per library, and differ among the SULs.

◊ UBorrow is both scalable and extensible. It will continue to be enhanced based on patron and staff feedback.

The UBorrow Implementation Team continues to meet regularly to discuss their experiences, share tips, and suggest and prioritize enhancements. In these few short months, several UBorrow improvements have already been made based on staff and patron comments. FCLA has added, among other things:

◊ the ability for patrons to specify which volume(s) they want in requests
◊ customized arrival letters based on pickup location
◊ modifications to lender labels for those who use them
◊ optimized searching and identification of eligible items for requests

Enhancements to the UBorrow renewal process are in active development:

◊ change to the renewal button in Mango to provide information to patrons about the process
◊ emails to update the patron of the status of their renewal request
◊ a script to automatically grant UBorrow renewal requests as per the agreed-upon policy

In addition to the technical work FCLA continues to invest in UBorrow, we have focused heavily on staff training in support of the new service. Since the decision to move forward with the soft launch was made in early February, FCLA has provided over 16 hours of scheduled training and office hours via Elluminate (not including additional sessions scheduled on a request or as-needed basis). Over 100 total hours of UBorrow training have been provided by FCLA since July 2010.

Patron comments have been positive overall. A few examples: “This is a terrific service! Thank you!” (FIU patron); “Thanks for this service, it’s a great assistance.” (UF patron); “This was a very user-friendly operation. The experience was good.” (USF patron). The comments mechanism has also provided a way for patrons to add additional information about their request, or report problems so
that library staff and FCLA can follow up.

Library staff are becoming more comfortable with supporting the service. Staff are also active in requesting improvement and customizations. For example, these enhancements were recently added on request:

◊ Modified FSU’s Arrival Letter email to include logic, so that based on the pickup location chosen, the patron receives a customized message detailing which desk or Floor at that location to visit.
◊ Tested and implemented sending Arrival Letter email directly from the server for FGCU and FAMU. Because of campus restrictions regarding sending email via Secure SMTP, these libraries were previously unable to send email at all, or could only send from a specific workstation. Will be expanding this to other SULs.
◊ Modified the UBorrow Hold Shelf List Report to include logic for printing units specific report of items left on the hold shelf. This was implemented at multi-unit libraries at FIU, FAU, FAMU, FSU, UF and USF.

Libraries outside of the SULs are also interested in the UBorrow project. Recent conference presentations have been well received. On May 5, 2011, Jennifer Kuntz (FCLA), Barbara Stites (FGCU), Rachel Besara (FSU), and Michele Crump (UF) presented “U Want It? UBorrow It!” at the Florida Library Association Annual Conference. “Make It So, Somehow: Explicit and Implicit Management of Florida’s Unmediated Borrowing Project” was presented by Jennifer Kuntz (FCLA) and Wendy Ellis (FCLA) at the Ex Libris Users of North America (ELUNA) 2011 Annual Conference, May 12, 2011.

**Single Bib Pilot Project**

The Single Bib Pilot Project has continued to move forward and follow the estimated timetable. We may need to make adjustments to include the addition of upgrading to Aleph Version 20. FCLA continues to work on error and data correction reports and the tag treatment table for Authority records.

FCLA has configured the single bib client and data to allow review and testing of both Acquisitions and Serials functions and workflows. Batch load processes have yet to be tested, until GenLoad, the FCLA utility for loading records, has been enhanced for the Single Bib database. However, it is now possible to download records from OCLC. The records are overlaid and the overlay records merge.

FCLA successfully merged the Aleph Permissions files for the three pilot institutions.

**RapidILL**

Implemented a monthly automated process for extracting and transferring e-holdings updates to RapidILL for institutions that use the SFX KnowledgeBase for populating their e-holdings in the RapidILL database (UCF, FAMU, New College, USF, and UWF). The first completely successful automated run happened on April 5th.

**CSUL Website**

CSUL decided in their March meeting that FCLA should become responsible for supporting the CSUL website. We are working on creating a website in Drupal and transferring over the existing documents. When it is completed committee staff will be able to update the site to add minutes, reports and members.

Our target date for the new CSUL website is mid-June. Below is a “preview” of the new site.
**Selected ALEPH Ad-HOC Reports**

- Single Bib Project - Created reports for the Single Bib pilot libraries to identify unmerged bibliographic records within their individual catalogs.
- FSU - Strozier Titles also held in UF Special Collections
- UF - All Health and Vet Med Serial Titles
- UWF - Began running a new series of reports of duplicate holdings to supplement their weeding project.
- FGCU - Report of barcodes, call number, title and number of loans for Videos with an Item Process Status of “Display Case”
- UF Law - Report of title, call number, barcode, record creation date and number of loans for DVDs for FY2010.
- UF - Count of circulation on items in storage since May 2004 by Patron Status.
- UF HSCL - Two journal titles list reports to aid in a collection merge project.

**Digital Collections**

- Created new ETD update report as part of ETD workflow to allow staff to modify release date and access levels for ETDs.

**UBorrow Reports**

- Created a new UBorrow Data Warehouse table with information about titles requested and titles loaned, to support both individual institution and cross institution reporting.
- Added a total of 9 reports for staff to run in addition to standard Aleph Reports and Mango Use statistics. A sample of the “UBorrow Requests by Patron Status” for FSU is shown on the right.

**Weeding Reports**

Created a “low use” report to assist libraries in their weeding projects. This report allows staff to create a list of items that meet two variable criteria: number of circulations, and no activity since a certain date. UCF reviewed and gave us feedback, which was used to improve the report. This report was demonstrated to Access Services, TSPC and CPC. Go to: [http://fclaweb.fcla.edu/content/low-use-items](http://fclaweb.fcla.edu/content/low-use-items) to run the report. A snippet of a report to identify low use items in the FIU Biscayne Bay General Collection is shown below.

**ARROW (On-demand) Reports**

- Created two Local Authority reports to inform the discussion of creating a merged local Authority file for the Single Bib project and to help libraries clean up incorrect data.
- Created a loan count report that includes both ALEPH and NOTIS Loans.
- Incorporated suggestions from UCF into the “Doc Numbers for STA Values” and various E-Resources Reports.