

SEMLOL
Annual Spring Meeting Minutes
“Next-Gen Library Services: SEMLOL Technology Showcase”
April 18, 2008
Oakland Community College, Orchard Ridge Campus

Introduction:

Dr. Jacqueline Shadko, President of Oakland Community College, Orchard Ridge Campus welcomed the SEMLOL members to the Annual Spring Meeting.

Lunch and Business Meeting:

The SEMLOL members enjoyed a delicious meal prepared by the Institute of Culinary Arts at Oakland Community College. At 12:45pm, Mary Ann Sheble, the outgoing SEMLOL chair, called the business meeting to order. Mary Ann welcomed the SEMLOL members and then introduced the new board. She also welcomed some new guests from several public libraries who were attending their first SEMLOL meeting.

Mary Ann asked for a motion to approve the slate of candidates for the board. Nancy Widman of Henry Ford Community College motioned to approve the slate of candidates. Michael Cummings of Madonna University seconded. The motion was approved by the membership.

The member libraries then gave reports on the current events at their individual institutions. After the reports were concluded, Sara Memmott of Eastern Michigan University motioned to adjourn the business meeting. Barbara Kriigel of The University of Michigan-Dearborn seconded. The meeting was adjourned at 1:30pm.

Spring Program Presentations:

Concurrent Sessions - Set I:

“Virtual Reference: The Southeast Michigan Connection.”

Carrie Croatt-Moore, Librarian, Wayne State University, Jill Spreitzer, Associate Librarian, University of Detroit-Mercy and Ann Walaskay, Librarian, Oakland Community College.

Laura Mancini, the SEMLOL moderator for this session, welcomed the participants and introduced the presenters for the session. The program began with the presentation from Carrie Croatt-Moore of Wayne State University. She discussed the virtual reference program at WSU. She began by reviewing the program’s history which dates back to 2003. She demonstrated the software program that is used, which is Docutek. Librarians are assigned virtual reference shifts, in the same way that they are assigned shifts at the reference desk. Carrie gave examples of typical reference transactions and discussed the overall success of WSU’s program.

The second presentation was made by Jill Spreitzer of the University of Detroit-Mercy. She focused her presentation on The American Jesuit Colleges Virtual Reference Project, which is the mechanism through which the UDM provides the service to its students. She reviewed the participating institutions and discussed how staffing of the service is shared among the institutions. Answers to reference questions are given whenever possible using databases from the patron's library. Tutor.com's *Ask a Librarian* service is also utilized to provide supplementary coverage. Jill also reviewed the statistical reports that are created to provide usage data and other analytical measures.

The third and final presentation was made by Ann Walaskay of Oakland Community College. Ann spoke about the *Research Help Now* virtual reference program. This is a collaborative initiative between 15 Michigan Community Colleges, the Library of Michigan and Michigan State University. The program uses OCLC's QuestionPoint software, the features of which Ann demonstrated. She then reviewed the virtual reference transaction process and discussed the interaction that takes place between the librarian and the patron. Finally, she also detailed the activities of the Advisory Group for the cooperative and provided statistical data on the service.

“Web Gadgets, Widgets and Tools for Library Services.”

**Jeff Zachwieja, Reference and Electronic Services Librarian, Marygrove College,
“Getting Started with IM.”**

Judy Dyki, the SEMLOL moderator for this session, welcomed the participants and introduced the presenters for the session. Jeff Zachwieja began the session, outlining the experience of Marygrove College with implementing an IM reference service. He noted that Marygrove had used the Docutek service for virtual reference originally, but discontinued use of that system due to technical difficulties and expense. Marygrove changed to a simple email reference service and then considered adding an IM reference service.

Jeff covered the following points on why a library should choose IM:

- It's free. – There is no subscription cost to use IM and the software can be downloaded for free.
- It's relatively easy to use and implement.
- Many library users are comfortable using IM.

Jeff also outlined the drawbacks to using IM, including the following:

- There is no technical support for the software.
- Multiple network problem – IM services from Yahoo, AOL, MSN, etc. don't talk to each other. The Library has to have all the IM clients to communicate to patrons on different networks.

Jeff noted that with the last problem of multiple network communication, various third-party softwares have been developed to resolve this issue. Such “multiple network clients” include pidgin, Trillian and Meebo.

The first step to implementing an IM service is to sign up for an IM service at Yahoo, AOL, MSN, GoogleTalk, etc. The next step is to download the necessary software and configure it. To facilitate responding to multiple IM services, you will then need to set up an account with one of the above multiple network clients (pidgin, Trillian, Meebo, etc.). Now you are ready to answer IM messages.

Jeff also discussed some of the widgets available from the multiple network clients, such as Meebome widgets which can create a small piece of code that can be copied and pasted to your library’s website. One such widget is a chat box which can be added to your library’s page, allowing patrons to IM the library using the chat widget.

**Sara Memmott, Emerging Technologies Librarian, Eastern Michigan University,
“IM in Practice.”**

Sara Memmott presented on the experiences of Eastern Michigan University with their ongoing IM services. She noted that like Marygrove, EMU uses the Meebo widget on their library website and has IM accounts on AIM, GoogleTalk, MSN and Yahoo. She commented that pidgin had been selected as the multiple network client and it had been installed on the librarians’ PCs to allow them to do IM in their offices.

She also noted that EMU uses centralized pidgin settings and login settings, so that all IM transactions can be logged into one location. Sara remarked that the pidgin4lib plugin had also been added to pidgin at EMU. This plugin automatically authorizes Meebo widget visitors and repeats the new IM alert until the librarian responds.

EMU has chosen to hide the Meebo widget when the librarian is not available. It is replaced by the Ask a Librarian link. Sara noted that when you register online with your IM you can choose to add the option to hide the widget and display a replacement item when the librarian is not online.

Sara then supplied a few statistics from EMU’s IM experience. She noted that 85-90% of questions came via the Meebo widget. She remarked that this is an indication of a point of service opportunity being taken advantage of by library patrons. Sara commented that one of the drawbacks she had encountered with the IM service, was that IM accounts cannot be logged on simultaneously. This can cause problems at reference shift changes. If the current reference librarian is still answering a question and the next reference librarian logs into the IM account, the current librarian will be kicked out of his/her session. The solution to this is good communication between librarians at shift changes.

Mike Sensiba, Next Generation Librarian, Wayne State University, “Using Toolbars to Deliver Library-related Information.”

Mike Sensiba presented on the use of Library toolbars to focus library users on library resources and facilitate searching of the Library’s website. Mike used a website called Conduit.com to create customized library toolbars. He cited the following reasons for creating a library toolbar:

- To create another path to the Library.
- To “surface” (bring to the surface) links on subpages which might otherwise stay buried and unseen by the user.
- To target a particular audience.
- To create a “sticky” presence for the Library.
- To integrate the Library into the browsing (research) process.

Mike noted that a toolbar can be used in the following ways:

- To supplement the Library website.
- As service support. (For example, toolbars can be created for other university services or departments, other than the Library to facilitate location of those services by students.)
- To create an audience focus. (For example, toolbars can be created to focus on a particular group, like First-year Experience students or for a work group, like reference librarians. A toolbar can also be used to create subject guides.)

Mike then reviewed the toolbar creation process. He cited the following steps:

1. Identify the purpose and audience of the toolbar.
2. Design the toolbar organization.
3. Gather links and logos for the toolbar.
4. Create the search options for the toolbar.
5. Create the menus, items and links for the toolbar.
6. Create alerts for the toolbar.
7. Adjust the settings as desired.
8. Create documentation for the toolbar.
9. Market the toolbar widely.

Mike also provided the following tips for creating a toolbar:

- Planning pays. Think about the toolbar before getting started.
- Gather your links, logos, etc. ahead of time.
- Be aware of screen resolutions which might potentially be employed by toolbar users. (Keep the resolution of the toolbar to 800 X 600 pixels.)
- Control extras.

- Order and clustering of items matters. Keep it simple and understandable.
- Use tool tips (Hints) to make it easy for the user to see what the link or logo does for them.
- Work with your IT department.
- Be sensitive to accessibility, usability, privacy, technical issues, etc.
- Rollout and market the toolbar in a beta test.

Mike noted the following “pros” for using a toolbar:

- It’s ever present.
- It can cover selected resources.
- It is integrated into the search.
- It is customized to a task.
- It is an avenue for communication.
- It’s a low-cost tool.
- There is easy development involved with making a toolbar.

He also noted the following “cons” for using a toolbar:

- Download of software is required.
- Patrons need to be made aware of and trained in the use of the toolbar.
- The toolbar has somewhat limited capabilities, especially in terms of on-campus/off-campus use. There have been technical issues with off-campus use of toolbars.
- Enterprise rollout of the toolbar can be challenging. The Library has to get buy-in from other departments, administration, faculty and students.

Finally, Mike cited the following issues that must be considered when contemplating creating a toolbar, including usability, privacy, marketing, platform and implementation.

Concurrent Sessions – Set II:

“MeLCat: Service Considerations.”

**Rita Bullard, Access Services Librarian, Eastern Michigan University and
Kathy Irwin, Head, Circulation Services, University of Michigan-Dearborn.**

Mary Ann Sheble, the SEMLOL moderator for this session, welcomed the participants and introduced the presenters for the session. Each presenter provided an outline of her presentation. Powerpoint handouts were distributed to the audience. Approximately 25 SEMLOL library participants attended the session.

The following is a synthesis of the two presentations, taking information from both and comparing/contrasting the experiences of the two institutions with MeLCat. In the area of customer experience, the following was highlighted by the two presenters:

Kathy Irwin noted that The University of Michigan-Dearborn uses Innovative Interfaces (III) as their library system, which integrates seamlessly with the III MeLCat INNreach application. Data transactions are dynamic and in real-time. Rita Bullard noted that Eastern Michigan University uses Voyager as their library system and must transmit data to the MeLCat system, interfacing with MeLCat through the DCB box and MeLCat software. At EMU, patron loads are sent to MeLCat weekly, while bibliographic and item status loads are done daily. Rita commented that it is a simple 5-step process to extract and send the data.

Kathy remarked that UMD allows all affiliates, including alumni, to borrow items through MeLCat. These borrowers are allowed to request a wide-range of materials, including leisure materials and textbooks. Patrons can access MeLCat through the UMD catalog or they can go directly to MeLCat. The click-through icons allow patrons to request materials through MeLCat, when they are not owned by UMD or when they are checked-out.

The process to request materials at UMD is simple from the patron perspective. Patrons click on “Get this for me” from MeLCat or the local library system and enter their institutional 8-digit identifier. The request is reflected on their library account. The UMD tracking information can be accessed on the local library system.

At EMU, Rita noted that MeLCat requests are limited to currently enrolled students, faculty, and staff. As with UMD, patrons can borrow a wide-range of materials, including textbooks and leisure materials. The process for searching for materials and entering a MeLCat request parallels the UMD process, except for tracking. Patrons must track their requests through MeLCat rather than through the local library system. Both institutions request that patrons use MeLCat before entering a formal interlibrary loan request.

In regard to staff workflow, the two presenters highlighted the following:

Kathy explained that at UMD, the interlibrary loan department (ILL) is located within Circulation Services. The department handles MeLCat requests from other libraries, returns from patrons, returns from libraries, and returns when items are not picked-up by UMD patrons within 10-days. Because OCLC interloans are also handled through this department, sorting has become a major piece of the department’s work. Kathy distributed samples of routing slips used by the department for MeLCat materials.

Rita remarked that the EMU Acquisitions Department is responsible for handling MeLCat outgoing and incoming materials. Because Voyager does not interface dynamically with III applications, duplicate check-in and check-out (local library system, MeLCat) transactions are required.

In regard to the use of the Visiting Patron program, the two presenters highlighted the following:

The Visiting Patron program is an optional feature of MeLCat. It allows patrons from participating MeLCat libraries to institute the borrowing process for themselves, requesting items from other libraries that participate in the program. Kathy remarked that UMD uses this program rather than Michicard. Some advantages of the Visiting Patron program are:

- 1) Saves the library staff time pulling and packaging items.
- 2) Patrons can have items right away – there is no wait-time between placing the request and receiving the item.

Kathy explained that UMD has specific book bands to identify items checked-out through the Visiting Patron program. They also have instruction sheets for their patrons who may be interested in using the program.

It was noted that patron records are checked in MeLCat to determine if patrons are in good standing at their home institutions. Currently, agency codes must be known to access patron records on MeLCat and this is cumbersome. Enhancements may allow a better search/access process.

Kathy encouraged SEMLOL libraries to consider replacing Infopass with the Visiting Patron program and outlined the advantages of the Visiting Patron program over Infopass. She noted, however, that this would be practical only if all SEMLOL libraries moved to MeLCat.

Kathy did a brief comparison between MiLe and MeLCat. Amongst the similarities, she noted the following:

- In both systems, the patrons initiate the requests.
- Both systems use a different application from the local library system for access, if the Library does not have III.
- Both systems send email notices automatically to the patron.
- Both systems use book bands.
- Article lending is not available in either system.

Kathy noted the following amongst the differences between the two systems:

- MeLCat software does not check items out in the local library system, if the local system is not III.
- MeLCat has the Visiting Patron program.
- MeLCat does not use Z39.50.
- The NCIP format for records is in the testing phase in MeLCat only.

The following MeLCat statistics were noted:

- 253 libraries participate in MeLCat.

- Academic – 42
- Public – 183
- K-12 – 24
- Special – 4
- 26.2 million items are available.
- An average of 7,435 requests/week are made.
- As of March 31, 2008, 164,874 requests have been made.

Currently, UMD and EMU use OCLC primarily for article requests. Most book requests are made/received through MeLCat. Undergraduates are the largest users of MeLCat at both institutions. If III is able to develop copyright controls and article lending is implemented, both institutions anticipate a large increase in MeLCat traffic.

The positives of MeLCat include:

- Patrons love MeLCat.
- MeLCat provides fast delivery of books from Michigan libraries.
- MeLCat is less expensive than traditional ILL.
- MeLCat provides load balancing so that no one single library receives more than a fair share of requests.
- More library items circulate.
- III libraries have fully-integrated sessions with real-time transactions.

Libraries that are considering MeLCat should be aware of the following service considerations:

- Interloan volume will increase.
- Staffing will need to be adjusted to handle the increase in ILL volume.
- Patron and bibliographic records must be loaded to the central server for non-III libraries which will involve additional time and setup.
- Libraries will need to determine the break-even point of borrowing vs. buying.
- Tracking loans and requests for specific titles can be difficult.
- DCB libraries will not experience real-time requests.

The presentation concluded with a question and answer session.

“WorldCat Local and OCLC Social Networking.”

Mindy Pozenel, Director of WorldCat Discovery Services, OCLC, “The Evolution of WorldCat Local.”

Margaret Danowski, the SEMLOL moderator for this session, welcomed the participants and introduced the presenters for the session. The first presentation was made by Mindy Pozenel. She began with an overview of the evolution of WorldCat. She noted that there had been a progressive change in the use of the web from 2005-2007. Use of library websites, in

particular, had dropped off during that period. OCLC wished to address this concern and target what patrons want in an attempt to bring users back to library websites.

OCLC identified two basic qualities that patrons want from a website: 1.) Simplicity and ease of use and 2.) Self-service capabilities. OCLC then developed a vision of how they would like to see library services evolving and identified the following goals:

1. OCLC would develop a way to deliver library services at the point of need (i.e. patrons would find library sources via Google, Yahoo, etc.).
2. OCLC would encourage users to participate in a network and community of libraries.
3. OCLC would create a service with local, group and global reach.

Mindy then discussed the evolution of WorldCat into Open WorldCat. Open WorldCat was developed to integrate WorldCat content into popular search engines such as Google and Yahoo. WorldCat.org was then developed as a destination website where patrons can duplicate searches and are able to search the entire WorldCat database. Finally, WorldCat Local builds on the improvements to WorldCat.org, leveraging the traffic from both Open WorldCat and WorldCat .org.

Mindy remarked that WorldCat Local can include all of the following:

- Local catalog
- Group catalog
- Databases
- WorldCat.org

She then described how WorldCat Local works, noting the following:

- WorldCat Local is based on the holdings in WorldCat, both physical and electronic (i.e. e-serials).
- WorldCat Local uses digital collection harvesting which is OAI-based.

She then cited some statistics from the University of Washington, which is currently running WorldCat Local as a test site. From that institution, it has been noted that consortium borrowing has increased by 61% and ILL requests have increased by 114% since the pilot started. In addition, Mindy commented that more traffic is being driven to the University of Washington's databases through WorldCat Local. She then demonstrated the University of Washington's WorldCat Local search and remarked that a simple .html script will place a search box on a library's webpage, through which WorldCat Local can be used.

Jasmine de Gaia, Global Product Manager for WorldCat Consumer Discovery, OCLC, “Applying Social Networking to Your Library through WorldCat.org.”

Jasmine de Gaia’s presentation followed that of Mindy Pozenel and in it she offered librarians a glimpse into the possibilities of social networking for libraries. She suggested the following reasons why it would be desirable to leverage social networking across many libraries:

1. To provide a richer user experience.
2. To increase library reach.
3. To improve local service.
4. To lower costs to individual libraries.

Jasmine then offered the following reasons why individuals are drawn to social networking sites:

1. The value of the site draws people to it.
2. Ease of access attracts people to the service.
3. Active engagement gets individuals involved in the site.

Jasmine then reviewed some statistics from the WorldCat.org website, noting that more than 1.7 million unique users have visited the site, and to date, 13 million pages have been viewed. She also commented that 750,000 click-throughs to library websites have been logged. Jasmine then provided a demo of the WorldCat.org page with the social networking features available.

She demonstrated how users can make lists, allowing individuals to keep track of their interests or create personal catalogs. It is also an easy way to group library-owned items. She noted that librarians can create lists which recommend books to a particular group. Finally, Jasmine showed the group the “Share It” tool which has been added to allow lists to be shared with others. Sharing can be done with Facebook, del.icio.us, etc. and lists can even be put on RSS feeds.

Jasmine discussed WorldCat Identities, the WorldCat.org Blog and WorldCat’s Facebook App. She noted that 59 million users exist in Facebook and this is a large resource to tap. The WorldCat Facebook App can help Facebook users connect to their libraries. She commented that the application is “viral,” meaning that it can be shared with friends and thus will spread more quickly to new users. OCLC hopes to tap into this large user-base and direct more individuals to library resources.

Evaluations were collected at the end of the last two concurrent sessions. The meeting adjourned at 4:00pm.

Submitted by: Margaret L. Danowski
May 9, 2008