

**Library Tools Task Force
Executive Report
Submitted August 29, 2006**

Task Force Charge

The charge of the Task Force was to identify computer-based products and services developed in-house by CARLI members, that enhance existing commercial or open source systems, or stand-alone products that address library needs in ways that the commercial or open source systems do not. Additionally, the Task Force was asked to recommend a method for CARLI members to identify these products and services easily, for example: develop a web site to act as a clearinghouse. See <http://www.carli.illinois.edu/comms/libtoolstf.html> for the complete text of the charge and all committee work.

Recommendations

The Task Force recommends that CARLI create a web environment, utilizing social software, for sharing information about software tools developed by member libraries and to facilitate informal communication among members about the tools and their use. See Appendix A (pages 4-7) for a summary of the locally developed tools described in the survey responses. See Appendix B (pages 8-9) for a detailed proposal for the Web site.

Due to issues encountered during the Task Force's work, the following supplementary recommendations are also made:

- 1) That two definitive directories be created and maintained by CARLI.
 - a) CARLI Library Directors and Department Head contact information for each CARLI member library.
 - b) Directory of basic tools (hardware/software/operating systems) being used by each CARLI member library.

- 2) That CARLI investigate and purchase an additional survey tool that has more flexibility than Survey Monkey, which is not suited to surveys with open-ended questions.

Process

The Task Force met twice in person and twice via conference call. The Task Force also took advantage of the collaborative use of *Blackboard*. After some initial variations in interpretations of its charge, the Task Force developed a survey to collect information on any in-house developed products being used by CARLI members.

The survey had four sections:

- 1) Institutional contact information.
- 2) Institutional library systems profile.
- 3) Institutional programming resources and computing infrastructure.
- 4) Locally developed library tools.

The survey may have been more ambitious in its scope than the charge to the Task Force indicated, but it was strongly felt that the information received from Parts 2 and 3 would give the consortium a good picture of the wide variety of library automation available within the membership and present opportunities for CARLI members to identify libraries with similar systems and resources.

The text of the survey was given to CARLI central staff, which in turn created a web-based survey form using Survey Monkey. Task Force members envisioned the survey being used as a springboard for library tool discovery and evaluation.

Prior to the distribution of the online survey, an announcement was sent to CARLI Library Directors describing the Task Force charge and asking that the survey be given to the appropriate person(s) to fill out. Notification of the availability of the survey and its URL were sent to CARLI Library Directors via email on May 17, 2006.

Libraries were given approximately one (1) month from the time of receipt of the survey to have it completed.

Survey Results

Out of a possible 182 CARLI member responses, 70 usable responses were received. An additional seven responses were either duplicates or empty. Out of the 70 usable responses, nine libraries identified 19 enhancement tools to use with commercial or open source systems and/or in-house developed tools.

A text version of the survey is available at http://carli.illinois.edu/reports/libtooltf/libtools_survey.pdf. See <http://www.carli.illinois.edu/comms/libtoolstf.html> for a summary of the survey results and for a list of libraries that responded to the survey.

Survey results indicate, at face value, a minimal number of locally developed tools. Many of the responses also indicated a lack of knowledge regarding the topic; this caused the Task Force members to question whether the most knowledgeable staff member(s) filled out the survey. This led to further discussion of whether an online survey was the best methodology to use to discover the information desired and certain knowledge that the survey did not reach the most appropriate staff for response.

The Task Force feels that the charge of identifying local library tools and recommending a way in which to share this expertise with all CARLI members has been met. The Task Force recommends disbanding, unless the Board asks the Task Force to participate in the design of a web site to share locally developed library tools. The Chair of the Task Force would be happy to meet with the Board to discuss this report.

Respectfully submitted:

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Anne Hudson, CARLI Staff Liaison
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Appendix A: Locally Developed Tools – Summary of Survey Responses

Appendix B: Purpose of a Web Site

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Appendix A: Locally Developed Tools – Summary of Survey Responses

Tool Name: e-reserves hosting on EZproxy

- Tool Purpose: Uses the hosting capabilities of our Ezproxy server to securely host locally scanned documents for Voyager reserves module.
- Developer: Benedictine University.
- Language(s): Uses file hosting capabilities of our EZproxy server to securely host locally scanned documents for Voyager reserves module.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: Yes.

Tool Name: Booth Library e-Reserve System

- Tool Purpose: Manages electronic reserve class material.
- Developer: Eastern Illinois University.
- Language(s): ASP (Visual Basic); Windows 2000 (or 2003) server; MS-Access.
- Easily Adaptable by Another Library? Not very.
- Documentation: Not at present.

Tool Name: Offline Plus Plus

- Tool Purpose: Enhances Voyager's Offline Backup Circulation module.
- Developer: Eastern Illinois University.
- Language(s): Visual Basic, PC, MS-Access, Windows.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: Yes.

Tool Name: Web-based Reporting System

- Tool Purpose: The system interacts with the Voyager reporter server to generate and display the results on the Web.
- Developer: Eastern Illinois University.
- Language(s): ASP; Windows 2000 (or 2003) server, MS Access.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: Yes.

Tool Name: Library Instruction Modules

- Tool Purpose: Instruction modules for various library skills.
- Developer: Illinois Central College.
- Language(s): Camtasia and PowerPoint.
- Easily Adaptable by Another Library? Very easy.
- Documentation: No.

Tool Name: Online Library Tutorial

- Tool Purpose: This tutorial introduces freshmen to the organization of the library's web site, as well as some of the resources available for research. The tutorial covers some basics on searching selected databases/resources, and it helps identify how results appear and what those results indicate about availability. This tutorial is assigned to freshmen English Composition students by their professors prior to their first Information Literacy & Instruction session in the library. The tutorial is moderately interactive, providing a few places for the students to get feedback on their choices. Results are also compiled and sent to the Instructional Services Librarian.
- Developer: North Central College.
- Language(s): This product is entirely web-based, using HTML, CSS, and javascript.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: No.

Tool Name: Continuations Database

- Tool Purpose:
- Developer: North Central College.
- Language(s): Microsoft Access, with functions added using Access Visual Basic; ODBC, for connecting to Voyager/Oracle reports server.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: No.

Tool Name: Health SmartLibrary

- Tool Purpose: The Health SmartLibrary is a collection of tools that personalize and customize the users' access to electronic information resources. These tools are: My E-Resources, Stay Current, Quicksearch and File Cabinet.
- Developer: Northwestern University Medical Library.
- Language(s): ColdFusion and MySQL.
- Easily Adaptable by Another Library? Not very.
- Documentation: Yes.

Tool Name: ILL Wizard

- Tool Purpose: Interfaces with the OCLC ILL module. The ILL web form Java applet takes ILL requests from patrons and outputs the request data directly into the OCLC Review File. This tool has been released to the library community as open source.
- Developer: Olivet Nazarene University.
- Language(s):
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: Yes.

Tool Name: Doing Research: An Introduction to the Concepts of Online Searching

- Tool Purpose: This is an animated and interactive tutorial that introduces students to some basic concepts of doing research online.
- Developer: University of Illinois at Chicago.
- Language(s): It was designed with the assistance of a GA with Flash and other programming skills.
- Easily Adaptable by Another Library? Very easy.
- Documentation:

Tool Name: Finding Books: An Introduction to UICCAT

- Tool Purpose: This tutorial demonstrates how to search the UIC Library's Voyager/I-Share catalog. With permission, a UIC group used the Columbia College version as a skeletal outline.
- Developer: University of Illinois at Chicago.
- Language(s): Camtasia.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation:

Tool Name: Finding Articles

- Tool Purpose: A short tutorial that shows how to access the article indexes that the library subscribes to.
- Developer: University of Illinois at Chicago.
- Language(s): Camtasia?
- Easily Adaptable by Another Library? Fairly easy.
- Documentation:

Tool Name: New Titles List

- Tool Purpose: Enhancement to Voyager.
- Developer: University of Illinois at Urbana-Champaign.
- Language(s): Creates an MS SQL database. Uses PHP for web services, T-SQL for stored procedures, and some perl scripts to invoke stored procedures for daily updating. User can display a new titles list via HTTP or set up an RSS feed.
- Easily Adaptable by Another Library? Not very easy.
- Documentation: Not at this point.

Tool Name: Simple Archival System.

- Tool Purpose: A web-based tool for managing data about archives and MSS collections and publishing finding aids. Easy to use. Compliant with archival standards. Automatically produces a searchable, browsable user interface. Includes support for authority-controlled and subject records & provides an inventory tracking/location system. Easy to import data. Exports in MARC and EAD.
- Developer: University of Illinois at Urbana-Champaign.

- Language(s): Requires a blank mysql or MS SQL database and PHP version5 with the mssql, mysql, and gd2 libraries enabled. Entire database structure is automatically created in the blank database through the install tool which can be used via any web browser. No specific hardware requirements.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: Yes. We are building a documentation system into the program code. We also have user documentation. Both user and developed documentation will continue to be enhanced as the project evolves.

Tool Name: AutoImage

- Tool Purpose: Enhances GhostScript imaging tools. Allows the unattended imaging of Windows workstations using low network bandwidth and low cpu resources.
- Developer: University of Illinois at Urbana-Champaign.
- Language(s):
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: We have some web pages describing the tool.

Tool Name: Libscope – Customized Firefox OPAC browser

- Tool Purpose:
- Developer: Waubonsee Community College.
- Language(s): Windows XUL/Javascript.
- Easily Adaptable by Another Library? Not very easy.
- Documentation: No.

Tool Name: Office 2003 Research Pane Plug-in

- Tool Purpose:
- Developer: Waubonsee Community College.
- Language(s): PHP Win32/Linu.
- Easily Adaptable by Another Library? Not very easy.
- Documentation: Yes.

Tool Name: Mobile Todd Library

- Tool Purpose: Adds mobile telephone access to library user account management to enhance Sirsi/Dynix Web2.
- Developer: Waubonsee Community College.
- Language(s): Perl Win32 Intel.
- Easily Adaptable by Another Library? Fairly easy.
- Documentation: Yes.

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Appendix B: Purpose of a Web Site

The purpose of a CARLI Library Tools Web site is to facilitate resource and idea sharing across the consortium. This requires the site to be more than just a way to present tools but also a place for discussion, feedback, and collaboration. This website would utilize social software which is becoming the predominant interactive media in the present and near future, there by keeping Illinois academic libraries at the forefront of emerging technologies.

The site should contain:

- A description of the site and the site's purpose.
- Presentation of tools that libraries have developed.
- Forum/Blog/Wiki type environment where tools can be showcased, reviewed, talked about, and/or enhanced.
- Site search capability.
- Helpful links to other tool environments such as OSS4Lib and SourceForge.
- A submission process and form for new tools.
- Site contact information.
- A disclaimer that includes a note that this is not a replacement for I-Share listservs.

Information requested for each tool (only description, contact information and Y/N documentation will be required fields for the submission form):

- Name (if named) and description of the tool.
- Contact information.
- Why was this tool developed? What problem did it resolve/address?
- System requirements.
- Other systems that it works with or requires (ie. Voyager, SFX, etc.)
- To measure difficulty two Y/N questions:
 - Requires local customization
 - Requires programming
- Y/N - Documentation. If available the documentation will be loaded on this site.
- Screen shots.
- Source code.

Some issues have been identified:

- Should the submission process have a review process before a new tool is put on the site? The Task Force recommends that each submission not be reviewed. There should be minimal required fields so that someone can get more information and a forum/Blog/Wiki environment that facilitates peer review.
- Should this be a password protected site? The Task Force recommends yes.

- If this site is available to the entire Internet community people may shy away from adding tools and using the collaborative environment because of the time factor involved in participating in Internet-wide collaborative environments.
- How do we keep the site “alive”? The Task Force recommends that the content of the site be reviewed periodically for link-rot and aging of submissions. The site should also be advertised to the consortium membership on a regular basis. This would require an ongoing team of reviewers.
- What tools does CARLI have available to support the design and ongoing use of this collaborative, interactive web site? Forum/Blog/Wiki? This is a technical question for CARLI. If CARLI doesn't have such tools at present, could one or more of them be acquired to enhance communication among consortium members?
- Who will develop and maintain this site? This is a question for CARLI. Here are some possible options.
 - The Task Force does the actual design of the site and it is implemented by CARLI.
 - The Task Force designs the site in conjunction with CARLI Staff and it is implemented by CARLI.
 - CARLI designs and writes the site and it is given to the Task Force for review and approval.
 - Any other permutations of the above scenarios.