

Summary of Discussion and Recommendations of the Reference and WebPAC Panel Discussion 7th Annual HKIUG Meeting

11 December 2006, HKUST

4:30 - 5:30 PM

Location: Room 2465

Panel Members: Victoria Caplan - HKUST
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Richard Warthro - BU
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1. The role of HKALL and Z39.50 in the Library Catalog

- A. HKALL's strength lies in the fact that all eight university libraries in Hong Kong use the same library system
- B. Some libraries introduce HKALL to new students during library orientation and some don't
- C. HKALL in some ways provides better searching functions than Z39.50. However, the hit rate is not satisfactory due to different cataloguing practices amongst UGC libraries
- D. HKALL and Z39.50 are definitely different: HKALL in the way that it searches the eight JULAC library catalogues, and z39.50 by allowing a search of any local and overseas library catalogues with Z39.50 protocol.
- E. HKALL is NOT a union catalogue because:
 - Participating libraries do not load all their records onto the HKALL system.
 - The cataloging practices of different institutions differ, so that some items that should share a single record do not.
- F. Despite the fact that it is not a union catalog, library users act as though it is one. Loading all the records of all the Library's would be useful for patrons because they treat it as a union catalog.
- G. Both systems can continue to co-exist to serve different purposes
- H. We should change to wording of identifying the users' library to "Which is your home library?"

2. "My Record"

- A. Some libraries have implemented the Millennium edition of 'My record' and others have not.
- B. All libraries use a different name for the "My Record" function.

- C. Some participants think “My preferred search” is useful and others do not.
- D. Participants agreed that adding the function of allowing users to attach the record for their course reserves to their record using the “My Record” function would be useful for most UGs.
- E. Innovative (III) does not provide usage statistics on “My Record”, so libraries have no idea if such function is well received or not. Participants agreed that we should requested III to provide usage statistics for “My Records” functions:
 - How many users have enabled “preferred searches”
 - How many users have turned on or turned off the “My reading history” function.
- F. Some libraries do not purge patron records after graduation or otherwise leaving the university. The reading history is retained in the patron record which raises privacy concerns. Participants agreed to request an enhancement that would allow librarians to remove the “Reading history” from old patron records.

3. Exporting Records from WebPac

- A. The export function on Library Catalogs seems to be used less often than export of journal articles from various databases.
- B. III does not provide statistics on the export functions. It would be very useful if III could provide such information in management information similar to the way that we can analyze patron searches. Examples of useful information could include:
 - Number of export sessions (by date)
 - Number of exports per patron?
 - Export records by material type?

Post meeting note: Basic statistics are provided currently, but questions of material type and how exported (email? Download?) are still lacking:

Example:

Management Information on PUBLIC CATALOG SEARCHES – [XXXXXXXXXX] From Wed 22 Nov 2006 03:00:01 to Wed 13 Dec 2006 11:03:59 Statistics on number of records exported				
	#exports	%	#records	%
FULL Text format	118	64.48	988	63.33
BRIEF Text format	43	23.50	329	21.09
PRO-CITE format	2	1.09	11	0.71
END-NOTE format	0	0.00	0	0.00
Marc format	20	10.93	232	14.87
<hr/> TOTAL EXPORT	183	100.00	1560	100.00

- C. III does not support the export function to RefWorks and Endnote, particularly for Chinese records.
- D. Ed Spodick of HKUST Library shared a program that HKUST systems librarians customized from Brown University Library that allows direct export to Refworks (one record at a time) including CJK. It is available for download from the HKUST Library website
<http://library.ust.hk/software/rw-export.html>
- E. The meeting consensus was that the need to “save” marked records was silly annoying for users. It would be much better if the act of marking a record saved the record in the buffer (similar to Proquest marking).
- F. Patrons sometimes want information beyond what is in the “pure” bib record that is exported. Useful information to include in the “brief record”:
 - Location
 - Circulation Status
 - Permanent URL for the bib record
- G. After all these years, CJK characters *still* cannot be exported easily.
- H. Some libraries have a wide patron base that is not included in the Refworks licensing (e.g. HKU SPACE) and allowing the function of export in plain text in multiple styles (APA, Chicago, etc.) would be useful to them.

Recommendations on HKALL:

1. Participating libraries should load all records onto the HKALL system
Action: Forward to JULAC Directors
2. Change to wording of identifying the users’ library to “Which is your home library?”
Action: Forward to HKALL group listserv

Recommendations for My Record:

1. Strongly urge III to provide statistics for “My Records” functions:
 - How many users have enabled “preferred searches”
 - How many users have turned on or turned off the “My reading history” function.Action: III Enhancement Request
2. Allow users to attach the record for their course reserves to their record using the “My Record” function
Action: III Enhancement Request
3. Allow librarians to purge the “Reading history” from old expired patron records.
Action: III Enhancement Request

Recommendations for Export Function

1. Marking a record should also save a record, eliminate the need for the “save marked records” function.

Action: III Enhancement Request

2. Strongly urge III to provide support for the export multiple records to RefWorks, and Endnote in CJK.

Action: III Enhancement Request

3. Enhance the statistical information available on Exported searches to include material type and whether via email or direct download.

Action: III Enhancement Request

4. Add the following information to the “brief record” export:

- Location
- Circulation Status
- Permanent URL for the bib record

Action: III Enhancement Request

5. Solve the CJK export function in email ASAP

Action: III Enhancement Request

6. Create a function of export in plain text in multiple styles (APA, Chicago, etc.).

Action: III Enhancement Request

Compiled by Doris HUI, Shirley LEUNG, and Tory CAPLAN
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