Location: OhioLINK

Present: Amy McCrory, Beth Kattelman, Rhonda Rinehart, Cara Gilgenbach, Janet Carleton (phone)

Meeting was called to order at 10:40 a.m.

1. Update on recent developments with Application, Repository, and Search Engine

Cara summarized recent developments on the Application. Beta testing (involving about 35-36 people) officially ended February 1. We are allowing people to continue to test until the official, live release of the tool. A registration form to register institutions to use the Application, Repository, or both has been created by Dave and Cara. The form is on the Application site, but it’s not an obvious part of the Application. People will either be given a direct url to this form, or will link to it from the OhioLINK public EAD site (under the “Contributors” section). Cara also mocked up two pages aimed at Contributors or potential contributors. The first page provided basic information about registration, training, and documentation. The second page is a Contributors FAQ page. She will share these pages with the EAD list.

We are still committed to releasing the Application and Repository at the same time, but there are a few remaining issues involving the Repository that need to be worked out before we can make these publicly available. It is still hoped that some time in March, both sites will go live.

Amy has continued to work with Sheila and John at OhioLINK on issues related to the Finding Aid Repository and search engine site. The group discussed and made recommendations on several Repository site layout and design issues. The logo issue appears to be dead. We will use the faint “EAD” logo that appears in the upper-left corner of the page. Link placement and type in the navigation bar were discussed as well as the “Featured Finding Aid” box on the right-hand side of the page. The group then discussed, at length, the “Subject Areas” box on the left-hand side of the page. These broad subject areas would allow users to browse by subject areas, but they are not the same subjects as the finding aids’ specific controlled access headings. Janet will draft a list of subject areas based on broad LC classification areas and share that with the list. It was determined that it would be useful to be able to browse by subject area, browse by finding aid title, and browse by contributing institution. The discussion also covered the “Bag” function and “Find Similar Items” links used in the search engine. There is some confusion about how these function. Amy will take all of the recommendations discussed to Sheila and John to see if they can be implemented.

2. Application Name

It has long been felt that we need to have a catchier and more meaningful name for the EAD Application, especially as it is released to the public and we refer to it in training programs. The group spent some time brainstorming ideas for new names for the Application. Cara will put this list of names on the list and ask people to add to this, or make selections of their favorite names. If a new name is selected, some of our documentation would have to be revised.

3. SOA Workshop

We are slated to provide a pre-conference workshop at SOA on May 7. Two half-day sessions versus one full day session were discussed. It was decided to provide a full-day session (limited to 17 participants), but also to provide a demo conference presentation during the actual conference, for
those who could not take part in the workshop. There is a room-fee involved for the workshop, and SOA needs to recover costs on that. Janet felt that charging for the workshop was something to question with SOA. Since no presenters are being paid, is there any reason to charge, and is the charge only going to the room fee are the primary questions. Cara and Rhonda will take the lead on preparing the in-person workshop session, but Janet, Beth, and Amy will all be available to assist, particularly with the hands-on periods the session will include. Janet, Cara, and Rhonda are able to provide the demonstration session during the conference as well. They will base this heavily on the ALAO presentation done last year.

4. Training Programs

The bulk of the meeting was spent in discussing the Task Force’s training programs. There are two major thrusts: in-person, hands-on sessions, and online, Web-based instructional tools. Janet, Rhonda, and Beth are exploring online instructional tools. They have looked at many possible software programs and packages that might be useful. A primary question is whether the online instruction should be demo with screen shots, etc., or be interactive in some way. Janet suggested that perhaps a staged approach should be taken: start off with a static Web tutorial and develop something interactive later on, or introduce interactivity as possible. Several software programs were discussed. It was determined that this team should play around with some programs, prepare something simple, and bring that to the next meeting for review and discussion. The group will also outline a plan for development of online instructional tools.

Cara’s preliminary in-person, daylong training session outline was reviewed. There were many suggestions for improvements and changes. Beth suggested that each demonstration of functionality should be followed by hands-on time for participants to try out what they have just seen demonstrated. The hands-on periods could range from 5-20 minutes or longer, depending on what is being covered. A sample finding aid that all participants use was preferred over “bring your own finding aid to encode.” The Kivist finding aid could be modified slightly for this use. Cara and Rhonda will revise the outline taking all of these suggestions into consideration. They might try to do a “dry-run” session with students in the KSU SLIS program some time before SOA so they can see what problems or issues might arise with the outlined program.

Janet suggested a demonstration session on the Application and Repository could be provided at an upcoming OhioDIG meeting. This could also help us prepare for the SOA events. Cara will work with Janet on possibly presenting at a March OhioDIG meeting. This would be 45-minute demonstration, similar to what was done at ALAO.

Cara asked about appointing a contact person for the training team. Rhonda has volunteered to serve in this capacity. Everyone agreed to this.

5. Miscellaneous

Rhonda raised the question of whether or not OhioLINK will prepare a press release when the Application and Repository are publicly released? Cara will contact Candi Clevenger and see how this will be handled. We need to figure out which groups in the state need to be contacted about the release, when the time comes.

Janet mentioned the new OhioLINK committee concerned with digitization. She is likely to serve on it and can provide a good line of communication between that committee and the Task Force.

The next meeting of the Task Force is scheduled for April 16.