

Minutes of TSPC Conference Call

April 6, 2005

1:30-2:30 PM

Present: Mary Ann O'Daniel, FCLA; Donna Alsbury, FCLA; Ellen Bishop, FCLA; Catherine Gardiner, FGCU; Elaine Winske, FIU; Tom Tharrington, New College; Emmett Denny, FAMU; Kim Montgomery, UCF; John Hein, UNF; Martha Hruska, UF; Priscilla Williams, UF; Jean Bostwick, UF Law; Janice Ross, FSU Law; Dan North, UWF; Lee Ann Howlett, USF Health Sciences; Susan Heron, USF; Jim Michael, USF (CAGER); Janice Donahue, FAU.

TSPC Web site - Some ALEPH sensitive materials will be password protected, but meeting minutes will not be restricted.

It was established that the TSPC will schedule its conference calls for the first Wed. of every other month at 1:30 p.m. June 1 will be the date of the next TSPC Conference Call.

The June meeting minutes will be taken by the FGCU representative.

MacroExpress - John Hein reported that we are waiting for a report on the Directors' recent meeting to see if they approved the purchase of a collective license for the SULs. FCLA reps did not have further info on this decision.

Issues: Should we wait until everyone needs the software? The Phase 1 Libraries (P1Ls) are currently using it, and need additional copies as soon as possible. An informal poll was taken by John Hein, and it was determined that a total of 547 copies are needed, and 104 copies are already in use by P1Ls. John will follow up with an email of specific institutions and the number of copies each requires, including the number of copies each P1 and P2Ls currently have in use.

At this time, the MacroExpress software is not in use for any circulation functions. UF is using the software for serials check-in, and other institutions use it for Technical Services functions.

Some institutions want their copies purchased before July, or as soon as possible. John provided the information that the licenses must be purchased in blocks of 500, or 750, or larger groupings. The licenses already held at specific institutions would be folded into the 500 or 750. John will coordinate the information and confirm with each institution the number of licenses they need, and will send the information in an email to Michele Newberry. It is yet to be determined how the licenses will be funded, and in which budget year.

Report Tracker - Mary Ann reported that FCLA is still working on the RT enduser version, and there is no date projected for completion. The RT will be read access, and will be available for submission of Aleph problems, and to track problem status.

Use of Bulletin Board or Swiki - Questions were asked about the Swiki that FCLA hosts for DPPC. The DPPC posts minutes and shares information on Swiki. There is a learning curve for

Swiki, but Mary Ann O'Daniel indicated it was not a difficult learning situation. Swiki or an electronic bulletin board was discussed as an alternative to sharing information and minutes via email.

Aleph test/report regions and server upgrades - Donna Alsbury reported that everything has been moved to the new servers. Improved performance will be noticeable in indexing. Donna reported that some things run faster, other things do not. This is not a good time for P1Ls to go in and experiment in report because of the P2LS STP loads, but they can run reports if they need to, and should report on any problems or degradation in report regions. The P2Ls have the following STP dates: FSU May 2, FAMU May 23, USF June 27, FGCU August 8.

EDI Pilots with Midwest and EBSCO - Ellen Bishop reported on the EDI pilots for book and serial vendors.

Midwest - The pilot with UWF for monographic orders with Midwest was begun during the first week of March. A problem with Midwest is that the default folder at login on the FTP server has drop off and pickup folders, but Aleph has no place to designate the appropriate folder. Midwest has instituted a workaround. A request has been submitted to ExLibris for problem resolution. A PRB has also been submitted to ExLibris to permit order placement for all sub libraries or units at once. Currently, the orders need to be run one sublibrary or order unit at a time. Another problem noted was in currency display: Ex: \$25 was showing as 0.25 (this problem has been corrected). FCLA has sent List orders using UWF test data and received confirmation back. UWF will soon be able to start sending some test orders. The orders will have to be cleaned up before sending. Multiple ISBNs will not work, because ISBN is one of the matching points.

EBSCO - The EDI pilot with UF for EBSCO invoicing began in January, with a subset test file of bar codes, which was run against the invoice. A problem was observed that the memberships were not loading properly. On March 31<sup>st</sup> the test file was signed off on, and the next test file is being prepared for loading. When libraries set up new vendors, there are set up issues on both the vendor and client sides.

Data Warehouse - Donna Alsbury reported that FCLA has run about a month of updates against tables for UNF. No problems have been reported. A macro for a Commitments and Expenditures report is being written. It is "pretty likely" to be ready by the end of the FY for P1Ls. Reports currently available are Budget, Orders and Transactions.

CAGER - Jim Michael reported that two groups are working on two sets of guidelines: 1. Ejournal group is incorporating CONSER guidelines into our guidelines; 2. Data base guidelines built around the Bibco Manual for incorporating data resources. These guidelines are still being worked on, and drafts will be posted to the CAGER Committee Web site as they become available.

Authority Subcommittee report/loads - Mary Ann has been reassigned to spend 50% of her time on authority loading. She has not had time yet to look at comments on the recent subject

authority test loads. Some of the responsibility for other loading will be shifted gradually to the libraries by training them on GenLoad. The GenLoad training will be via phone for P2Ls during the pre-STP phase. After STP there will be onsite training for GenLoad.

Phase 2 Aleph updates - FSU is currently doing test load review of bibs and holdings items.

Phase 3 Kickoff - FAU kickoff was March 31-April 1; FIU was April 4-5. Kickoff for UCF is scheduled for April 19-20; New College is scheduled for April 27-28. Data conversion workshops will be scheduled subsequently for each of these libraries.

Listservs - FCLA staff reiterated the importance of promoting the use of the functional listservs (Acquisitions, Cataloging, Serials) for information regarding Aleph implementation/migration. The P2Ls and P3Ls should ask questions via the listservs of the P1Ls in relation to Aleph work flow problems, and other migration or implementation problems.

Future discussions - Martha Hruska requested topics for future discussions on TSPC conference calls. Issues raised were consideration of an electronic resource management system, and whether there is interest in purchasing Verde. It was noted that Verde is not too far along in development, and that FCLA is unsure of its ability to handle the mix of institutions, in regard to consortial purchasing of electronic products, since it is being developed for use by single institutions. At the time the new system was budgeted for, there were no ERMs available. Verde is an Aleph add-on that was not included in the budget.

Other issues - It was noted that the Tech Services Planning Committee Web page can be accessed from the FCLA Menu under State University Libraries.

Conference call concluded at 2:31pm.

Submitted by J. Donahue  
4/7/05