

Minutes of TSPC Conference Call
June 1, 2005
1:30 – 2:30 PM

Attendees:

FAU: Janice Donahue, Teresa Abaid; FCLA: Donna Alsbury, Ellen Bishop, Mary Ann O'Daniel; FGCU: Catherine Gardiner; FIU: Sue Wartzok; FSU: Carolyn Goolsby; FSU-Law: Janice Ross; NCF: Tom Tharrington; UF: Martha Hruska, Priscilla Williams; UF-HSC: Cecilia Botero; UF-Law: Jean Bostwick; UNF: John Hein; USF: Susan Heron; UWF: Dan North, Lynn Shay.

Phase 2 Aleph updates:

Mary Ann O'Daniel gave an overview. STP at FSU and FAMU occurred on schedule on May 2 and May 23, respectively. With the exception of one complication at FSU, which was straightened out within the day, everything went smoothly. USF's extraction was done last night and the cataloging freeze is on; STP is still scheduled for June 27. FGCU's STP date is August 8.

Phase 3 update:

Donna Alsbury reported that FCLA will have the first data migration workshop at FIU June 13 - 14. Two more will take place in July and one in August. All P3Ls have had their kickoff meetings. The first subset loads should be available in late July or early August. Serials and acquisitions training should take place in November and/or December.

Phase 1 libraries still have serials check-in issues and problems with prediction patterns. Donna recommended going to the listservs for information and help. One comment was that workflow has to change with Aleph and it means doing some things twice right now; this and training are time consuming.

Susan Heron reported that USF is beginning a 6 month test of not checking in journals. They will get patterns loaded but will not use them for check-in. When issues are collated for binding, the bound volumes will be entered and holdings updated. USF now only has 3000 serials subscriptions that are not electronic. They have agreed to use the time saved by not checking in for arranging access to more electronic periodicals, and to promptly answer questions about whether they should have received particular issues.

P2Ls and P3Ls were encouraged to look at GenLoad, which received excellent reviews from Phase 1 members. During the cataloging freeze, one library cataloged a large number of items in OCLC and loaded them in GenLoad after the freeze; they found it worked beautifully.

MacroExpress:

John Hein has interacted with Michele Newberry; FCLA will cut the check for Insight Software when it is time. John has negotiated with Insight and presented two possible plans, based on the current count of users committed:

- Buy 500 user licenses and continue with those we already have. Cost: \$5500
- Purchase the next level of coverage and receive a credit for those that will not be used. Cost after credit: \$6120

Michele has reported that the directors did approve the purchase and that the funds will come out of the equipment budget. USF has already bought MacroExpress licenses.

Susan Heron will report the number to John. John needs to know about any other purchases. It was agreed that we should purchase the 500 user licenses. Whether chargeback will be based on a flat rate or determined by number of users was not decided.

The committee discussed possible methods for accessing the software. FCLA could put the ID and password on the secure server; libraries could download the software directly from Insight or FCLA could also put it on their server. Separate IDs and passwords may be necessary for each institution in order to keep track of the number of users.

Status of the FCLA problem report tracker system:

Donna Alsbury stated that FCLA needs to do an upgrade. Bill Kuntz has joined FCLA now and is again working on this. There is no date set for completion, but things should move more quickly now. There is no interface with ExLibris for problem solution, but the ExLibris tracking number could be used in the FCLA database.

Aleph test/report regions, upgrades, service packs:

FCLA has put service packs on all the regions but had a problem in the production region. It should be up this weekend. The service packs fixed some circulation and permissions problems. They will soon review the next group of service packs.

EDI pilots:

The EDI pilot for EBSCO invoicing at UF loaded into production on April 28 and was successful. The only glitch was a problem with the Aleph loader. The service charges on the 19 invoices didn't load and had to be entered manually.

FCLA's initial testing and setup of EDI ordering with Midwest was also successful. Dan North reported that UWF will begin testing EDI ordering with Midwest soon. He will notify Ellen Bishop when he is ready to begin UWF's EDI testing for minor server changes and mapping of the Aleph order data. Dan is now arranging a separate test with YBP, and he will have them contact Ellen about their specific EDI setup and vendor account settings. There was also discussion about other SULs doing EDI testing with additional book vendors.

Data warehouse/reports/ARC:

Donna reported that the three tables now in the data warehouse are transactions, orders and budget. Reports can be run on these, but there is no title information. Updates to

records are applied to the data warehouse tables during the night and are available the next day. They are working on basic circulation and OPAC searching reports. Commitments & Expenditures reports are only available for P1Ls at this time. The next report will be expenditures based on object codes.

FCLA is not testing the ARC product. CCLA did so and decided it is not adequate for their needs. Updating tables for version 1 was a lengthy project. ExLibris claims any size institution will be able to do this overnight in version 1.1.

Fiscal year rollover:

FCLA is working on this, and documentation will be posted on the TS-PLAN listserv. The P1Ls should practice in their TEST databases before the real rollovers are run in PROD. The process appears to be reliable and straightforward.

Authority Subcommittee report/loads:

Mary Ann loaded the first weekly subjects file to be loaded directly into Aleph. She is doing the subject authorities first because they are small. Mary Ann may not have a chance to load another before leaving for a week; she will try to do one or two a day afterwards except during USF linking.

UF is considering outsourcing authority processing work.

TSPC Mission:

Martha Hruska will make the suggested changes to the document, send it to the directors, and then post it.

Announcements:

Mary Ann O'Daniel announced that the directors have approved a CSUL meeting. It is expected that it will be held in Gainesville November 7-9, 2005.

Sue Wartzok will send an email to the list with a link to a report on what a FIU task force recommends for themselves for electronic resources cataloging.

The conference call concluded at 2:40 pm.

Submitted by Catherine Gardiner