

Enhancement process

- Request for volunteers, introduce Patricia Hatch as Chair for coming year
- One serials enhancement did make it in this year
 - Global change of items within serials module without requiring going into items (ver.17)
- What's the use of the enhancement process?
 - Makes members think about the system
 - What kind of functionality do you want
 - Better understand workflows
 - Reevaluate what you think you need from the system
 - Members help to set tone for where the module is headed
 - Helps Ex Libris to focus on problems that could be solved later
 - Starts dialog with Ex Libris staff
 - Helps to educate Ex Libris staff
 - Definition of needs
 - Developing group gets a better concept of module
 - Recognize that some requests could be easily added
- Why is the enhancement process so lengthy?
 - Ex Libris staff need time to analyze the request, determine if it is feasible
 - Process needs to be methodological
 - moves from members to Ex Libris, then back to members
- Observations
 - Changes in newer versions that have been agreed upon because of individual contracts make it more difficult to determine what is actually needed
 - Have seen enhancements go in, but nothing happened
 - Ex Libris will assign 0 points to some requests
 - As a group, we need to urge Ex Libris to comment – why is this request not feasible?
 - If we can send the whole list (rather than sending only a top portion), Ex Libris can review all of our requests and might note those that are easy add
 - We are trying not to lose track of old requests – they are not forgotten, we need to find ways to get them seen
 - Other user groups might like to collaborate to force enhancements
 - UK looked closely at US enhancement lists
 - Might need to negotiate with acquisitions or cataloging groups
 - Will we have separate enhancement groups after ver.16?
 - Might lose points if we merge
 - Would the group favor one module over another?
 - Serials has also has ties to holdings records
 - Serials acquisitions and monographic acquisitions have connections and we can benefit from each other

Ver.16

- Client is combined, are modules really combined?
 - Called acquisitions module, but includes administrative, serials, and search modules
 - Tabbed display
 - Seem to operate separately
 - Orders and subscriptions are still separate
 - Multiple layers of windows have disappeared
 - Orders and subscriptions can not be displayed at the same time
 - Items and subscriptions can not be displayed at the same time
 - Group is not happy about this

Prediction patterns – new pattern interface options

- Be aware if you are moving library 50 or 60
- You have option of predicting from ADM or from HOL
 - You can leave your patterns where they are now, but you can't have them in both places
- 3 ways to create pattern
 - New pattern interface
 - ADM or HOL
 - Schedule form still exists
- What if you want to move ADM to HOL
 - Delete extraneous HOL data
 - Ex Libris is working on getting this cleaned up
 - There is a batch process you can use to move from ADM to HOL
 - However, not sure which HOL record it will copy
 - Will match on title -- if you have multiple records for various formats of a single title, you have decide where these will go
 - A program is available for ver.15+; global change
- Note -- when moving from ADM to HOL
 - 853 was used for the public display of holdings (combined w/ 86x fields)
 - Will need to create data for 863 (if you had this in the 853)
 - Every time a pattern changes, there is a new 853 w/ a corresponding 863
- Can retro data remain in the 866 w/ new data in 863?
 - Need to read NISO
- Consortiums/multiple libraries
 - ADM lib tab10 switch
 - Every library in consortium can have own patterns/holdings
- Check in
 - Issue is linked to 853 – generates display
 - Harvard has asked bound volumes to generate an 863
- Can predication patterns be shared?
 - ALEPH pattern database exists and data can be shared
 - One library has recently used this database
 - Ex Libris has patterns from six libraries available via FTP
 - Ver.15 does not have loader
 - Harvard did load some patterns--853's
 - Added 853X manually
 - Systems office built 853X using some data in old database
- Bizarre output
 - Bimonthly patterns might create 74 issues per year
 - Sometimes can not open next cycle of issues
 - Need to manipulate field 3 to get it to work
 - Harvard requested fix
 - Problems with annuals
 - This is fixed in ver.16
 - James will report if fix has been moved down to earlier versions
- Anyone using prediction patterns for e-journals?
 - New e-management module is expected, E-Resources
 - Focus is on tech services side, not OPAC
 - License management
 - Statistics
 - Arrival
 - Harvard and MIT are pre-spec sites
 - To determine functions and features needed by academic libraries
 - Want to move quickly to analysis
 - Will be opened for input from other libraries after pre-testing

Serials reports

- How are you dealing with serials claims
 - Because of conversion, some libraries have 100's of pages of claims
- Will Ex Libris change the reports?
 - XML in ver.15.2 – much friendlier, can export it to Excel
- In a decentralized library, running the report for several libraries was inefficient
 - Job was taking too long to run
 - SQL takes less than a minute
 - Less of a burden
 - Adele will share SQL (see document called claim_issue.txt)
- Ver.15
 - Can you separate order types in ver.15?
 - No web services, all in GUI's
 - There are order units (based on ship to addresses) can run a report based on an order unit
 - Harvard has set it up so that each order area is a unit

EDI (for ordering, claiming, invoicing)

- Uof I in production with serials invoicing
 - Manual labor still required for clean-up – problems mostly
 - How much manual labor?
 - Locate problems based on no budget in line item or missed lines
 - Varies from invoice
- Is subscription begin and end dates in line item an Ex Libris problem?
 - U of Minnesota experiencing problems
 - U of I not having problems
- Can Harrassowitz invoices be loaded?
 - Heard there were coding problems
- Is claiming even possible in 14.2?
- Why is EDI an FTP process?
 - Should not require human intervention

Encumbering serials

- Is anyone encumbering serials?
 - One library does encumber new orders only
 - In ver.15.2 -- when paid, it does clear encumbrance
- If you change the budget, the order list is not updated with the most current information
 - Sorts alphabetically
 - Display is misleading

Bringing ALEPH into production, first time and new versions

- If ALEPH can be made more compliant with standards, move would be better
 - Ver.16
 - Patterns are very different in this version
 - Able to add patterns
- Sites working on implementation
 - Florida – pushing back a year because of data problems
 - Texas Tech – will be live when they return from conference