

MONTANA SHARED CATALOG ANNUAL MEETING May 7, 2003

THE PLAYERS:

Bob Cooper as videoconferencing guru
Bette Ammon as facilitator

Participants from Helena site: Cyd Kreizwald (Boulder), Brook Page (MT DoT), Brenda Grasmick (State Law Library), Roberta Gebhardt (State Library), Darlene Staffeldt (State Library), Mike Price (State Library)

Participants from Billings site: Suzanne Reymer (Billings), Gail Nagle (Glendive), Bridgett Johnson (Lewistown), Lauren McMullen (Big Timber), Mike Hamlett (Miles City), Eric Halverson (Bighorn), Jane Gardner (Sweetgrass)

Participants from Missoula site: Michael Ober (FVCC), Mary Ellen Tunks (MT HistSoc), Jennie Stapp (MT HistSoc), Marilyn Trosper (Polson), Carrie Terrell (Plains), Jim Simmelroth (Missoula), Claire Morton (Missoula), Mary Ann Erickson (St. Ignatius), Dorothy Laird (Flathead County), Rita Kraus (Flathead County), Sarah McHugh (State Library), Honore Bray (Anaconda), Barbara Fredrickson (Dillon), Gloria Langstaff (Bitterroot), Kathy Roberts (Thompson Falls), Donna Worth (Whitehall), Bruce Newell (State Library), Bette Ammon (Missoula), Bob Cooper (State Library)

JOYS & CONCERNS:

Everyone had the opportunity to share ups and downs from the past year. While there remain areas to be worked out, the resounding voice of the group was upbeat and full of gratitude for such a great shared catalog! Most expressed joy at being able to see what other libraries have to offer and are full of anticipation to see the oncoming Eastern MT collections. Concerns include individual library financial woes, lack of adequate training and data com issues.

SIRSI ROOMS

Rooms is an additional application from Sirsi that rides on top of iBistro. It doesn't replace iBistro, rather it allows libraries to organize how they appear to patrons in context. For a clearer view of what Rooms can do, click on the following link

<http://www.sirsi.com/Sirsiproducts/rooms.html> and check it out. Rooms can be based on topics (e.g. animal room or local history room) which then provide links to services from this context; links such as online references, databases, web resources etc. An exciting aspect to Rooms is that the tools for building individual rooms are “non-nerdy” – in other words, anyone can build or edit a room. Much more to come on this context-sensitive portal. Stay tuned.

MSC PROJECT UPDATE

The Networking task force met last week in Helena and discussed objectives and planning for upcoming years. Do we add more libraries? Sit with where we are? Karen Strege suggested that the smart thing to do is to put together a business plan for the MSC. How many new libraries can we add to this group before we need more staff/trainers/a dedicated server? What is the cost model for adding new libraries? State library will help this group rough out a business plan for the next five yrs that will give us a strategic direction to help meet our needs.

Discussion: Instead of tacking on another year to existing year, why not step back and create a phase two to the initial three year project, essentially a 5 yr plan, and ask for a long term commitment? Questions? Funding – how much relies on state legislature/state library funding? Right now, a lot. See spreadsheet (from handout) that addresses maintenance costs and other breakdowns library by library. For next year’s MSC plan there will be lots of emphasis on training. Read on....

TRAINING

In general, we have been dissatisfied with Sirsi training for the first year, but are now addressing this with the oncoming libraries. We will train from within the membership this time around, right before each library goes live. The original acquisitions training left a lot to be desired and we are consequently signing up for some Sirsi online training. The training committee will be surveying MSC members to determine future training needs (what, where, when, etc.). FYI – Missoula Public Library is videotaping some in-house iBistro training sessions; the tapes will soon be available for other libraries to borrow.

SERVER/STAFFING

Currently the test and production environment are on same box, which is in part the cause of recurring problems we have been experiencing (i.e. system suddenly going down). However, if we move the test environment to its own box, how would we provide support for this? We will need more staffing down the line, but cannot afford it at this time. Eventually we may have enough libraries on board to assume personnel costs for this. State library is not configured right now to take over and

provide 24/7 service for its own server. It seems the best option right now is to have pursue separate production and test servers through ITSD at a price we can afford. Bruce is working on this. What is needed ASAP is a long-range plan so that we can begin budgeting for these items, allowing individual libraries to plan ahead. While using our current members to serve on committees, conduct training, and provide a variety of support services, there is potential for overwhelming folks who already have their plates full with their daily library jobs.

NEW LIBRARY COST MODEL:

See handouts for specifics. Much discussion about how best to determine individual library costs for upcoming year(s). Consensus was to use a model that splits the costs proportionately, using two metrics (directly from Bruce's handout):

- One-half each library's proportional count of the total number of bibliographic records; and
- One-half by each library's proportional size of their total operating expenses...this means all their budgeted expenditures, for the previous fiscal year

Note: after the meeting, Bruce and Sarah gathered more accurate numbers since the spreadsheet contained some inaccuracies.

Other budget stuff: Bette sent out invoices to each library the week of May 5th; these need to be paid before 6/30/03. Total dollar amount needed for FY03 is \$81,402.20. Most expressed interest in knowing what FY04 costs will be so they can put a placeholder in their budget for that line item. Budget discussion & confusion made it clear that we need a dedicated accounting person/committee to handle these issues in the future. Perhaps we could turn this over to the executive committee. Bruce will rework the numbers and compose a spreadsheet where we can see all 23 libraries together that will include solid FY03 numbers and estimated FY04 numbers. Finally, many libraries expressed interest in continuing to contribute to the "war chest" fund, as was modeled initially by the western MT libraries last year. The bottom line is to have timely annual \$\$ amounts for each library to plug into their budgets ahead of time. If anyone has a better suggestion on a model formula for calculating each library's share of annual costs, please share!

SIRSI SUPERCONFERENCE REPORT

From Honore Bray:

1) School Library Sirsi Interest Group:

- Look for a textbook module for bulk check out and in for sets of classroom books.
- ROOMS will be a great thing for school libraries. Teachers can create rooms for kids to use for projects and they will be able to access from public library also. Great tool for courseware management.

- ECOLE interface for catalog will be available to schools in place of Ibistro. They will be able to choose which they want and it will be a policy change to get it.
 - 2003 Workflows will work efficiently on MACS
- 2) Training:
- E-learning on the Web will be slick. Can use for two weeks, 24/7; can go back several times and take tests as self checks
 - Train one person or many; great for new employees
 - Distance learning is a real time application; 1/2 day sessions you need a PC and speaker phone available to users; 8 participants - 2 on each computer and can have silent members
 - Phone training - purchase in 2 hour blocks and use as wish but need to schedule time ahead; one of the contact people for Sirsi needs to get you in touch with the Customer Account Manager to sign up
- 3) Patriot Act and Sirsi:
- Logs that are kept for statistics can be a problem
 - Run the remove request report to remove completed requests because it contains patron and item info
- 4) Digital Media Archive- Hyperion:
- Cool product, would work great with ROOMS
 - Expensive for and individual library
 - Plan projects and have everything in place before starting
 - Library with rare documents, video collections that need to be preserved or photo collections would put to good use

From Claire Morton:

- 1) Ibistro- 2003 release:
- Ability to remove favorites from MyBistro
 - Locations/item types display beside search results (e.g. CD icon, VHS icon)
 - Print output options – all, full, brief (to save paper)
 - Kept list maintained through multiple searches (for entire session)
 - SINGLE RECORD VIEW – minimal scrolling – tabs
 - Item info (title, author, call number, item status)
 - Look inside (summary, review, author bio, table of contents)
 - Catalog record (subject/series hyperlinks)
 - B&N partnership: “Buy now”/library gets rebate check each from Sirsi each year; “Donate book to library later” option
 - Online web booking

** <http://demo.sirsi.com>**

(can view tabs format – no item type icons showing)

2) Circulation 2003:

- Lost processing:
 - Assumed lost & claimed lost (new shadowed location policies)
 - Items remain linked to patron record – display inactive checkouts (under display options) to print out lost items
 - Lost bills automatically removed from patron record when lost item is checked in and overdue fines are assessed
 - Special alert sound when lost item checked in
- Suspended loan:
 - Allows library to suspend loan privileges instead of assessing overdue fines (creates a “suspended status” for patron)
- User category fields:
 - 3 new user category fields (for reporting/stats purposes)
- Suspended holds:
 - Allows library to suspend a hold for a patron for a specified period of time without losing patron's position in hold queue
- Additional patron search points:
 - Search by Address, phone number, email address
 - Additional Alt ID fields
- Duplicate patron detection: you can select search points and system will check for duplicate patron records as you are registering patrons
- Blanket hold request: when patron puts holds on multiple items, the system waits until all items are available before notifying patron (helpful for multi-volume sets)
- Graduated fines – for example, \$1 for first overdue day, \$2/day thereafter)
- Graphical Standalone – more functionality, with menu bars/tool bars/wizards

3) Workflows 2004:

- New search wizards
- Revised common wizards to eliminate extra windows
- Receipt printing – no limit on text; library-controlled
- Sorting – checkout lists, searches, etc.
- Cut-n-paste glossaries

From Sarah McHugh:

1) Acquisitions news - Electronic ordering/X12 now available. This enables us to electronically send a purchase order to Ingram and receive an electronic invoice in return. Missoula Public Library is currently testing this. If you're interested, contact Ingram first and they will help you with account issues. Also, 9xx ordering where you order through the vendor website (e.g. ipage), run a report to load bib records into unicorn and then use this information create order records. Cost - \$2,400 per server & \$484 maintenance.

2) Consortial Sirsi Interest Group – move towards producing separate files for each library, rather than logging in circ, circ to get results.

Other coming attractions: Remote halt and run, item scoping (can restrict who edits your items), acquisitions selection lists, new hardware & software requirements for upcoming versions. More on these exciting developments when their time arrives!

NEXT MEETING PLAN & DATES:

How do we feel about this format? Applause all around! While it is not free it *is* cheaper than traveling. Since budget decisions are often made in March, we need to have subsequent meetings sometime during that month. The executive committee will set a specific date and inform the rest of us. Proposal to have an annual MTSC dinner on Thursday night at MLA. Let's give it a try.

DATA COMMUNICATIONS

Primary thing that makes MTSC work is bandwidth/telecommunications. MTSC has brought lots of focus on telecommunication needs in Montana; it is a high priority on everyone's agenda. We are still searching for solutions. Question: when a library has a problem, is it their ISP – telephone company? – their computer – server? On a statewide level folks are working with VisionNet and these talks have been productive. The idea is to find a certain type of solution that will address a number of problems and while that solution may not work for everyone, it will work for a group of problems. Non-MTSC libraries will benefit for this also.

There is concern that the new libraries may have the same data com problems that we've been dealing with. It is unwise to bring on more libraries until these issues are resolved. If your data communications fails, your catalog is worthless. The bottom line is to have a one-stop-shop for troubleshooting all catacomb problems. Can VisionNet do this for us? Remains to be seen...

What do we know about the data com situation in the new libraries? Miles City is having problems with too many hops, but otherwise folks seem okay.