

Tech Services User Forum

October 28, 2015

Present: Tim Burke - moderator (UHLS), Rob Carle (UHLS), Sue Dague (EGRN), Karin Martin (BETH), Daryl McCarthy (NGRN), Peggy Mello (COLN), Jendy Murphy (APL), Kathy Rosello (EGRN), Catherine Stollar Peters, Joe Thornton (UHLS)

Tim reminded everyone that the Advisory Council meetings are open to everyone, so the type of discussion in today's meeting could continue when the Cataloging Advisory Council meets.

Tim asked "What's working?"

Peggy: The overlay process for bib records is working better than in Horizon.

Jendy: Well, not so much for the Z39.50 load profile.

Sue: Merging bib records is better. The MARC editing tool is better than Horizon's. Z39.50 is better because we can search multiple targets simultaneously.

Peggy: Facets in Sierra make searching easier.

Karin: Agreed. The facets are good.

Jendy: The templates for bib and item records are good.

Tim asked "How about workflow?"

Catherine: In Acquisitions it's good to get order records from vendors.

Jendy: The process to create a new location could be better. The process is pretty slow, mostly due to the wait for III (and by the way, UHLS is great).

Tim asked if the slowness issue is impacting catalogers' workflow significantly.

Peggy: "Loading facets" is slow, and in general Sierra is a slower experience compared to Horizon.

Tim: Suffolk County, another Sierra site but one that hosts their own system, is also slow, so although we continue to work with III on the problem, some slowness may be unavoidable.

Catherine: Sierra is so slow to start that BETH has staff come in a half hour early every day to start the staff workstations so they'll be ready when the doors open.

Sue: Startup time can be as long as fifteen minutes.

Peggy: Evenings seem better.

Miscellaneous:

We had a long discussion about Item Types, with some feeling they were better in Horizon (after our cleanup project). Joe described the process we went through to choose the Item Types we have, and said there will be opportunities to fine tune those and other system elements as we gain more experience.

We need to get moving on Decision Center. III gave us some instructions that Joe struggled with before putting the project on the back burner while we worked on other things. UHLS will make this a high priority now.

Rob said that the III Helpdesk is often unresponsive, and Catherine said that discussions in the Innovative Users Group listserv support that claim. Tim said that he has asked for and received names of III contacts for us to use when the Helpdesk isn't giving us what we need.

Tim asked what training the system needs, and 'Reports' was the almost unanimous answer. Create Lists, Saved Searches, protocols (e.g. naming conventions), Rapid Update, etc. all need refresher workshops, and UHLS will plan those.

We discussed the role of the advisory councils and agreed that they should meet more often, that it should be made clear to everyone in the system that anyone may attend, and that poor Joe shouldn't always have to take notes and write the minutes.