WELCOME! Thanks for coming…

Hopefully this will be an informational session for you and EFTS staff…at the end we’d like to hear your comments and suggestions.

PP will be up on the website
A year of transition and changing personnel…

In July 2005 Ralph Arcari, the developer of EFTS and UCHC library director retired…at that time Ed Donnald, involved in the development, also left EFTS

Evelyn Morgen the new director of the UCHC Lib assumed the position of EFTS Program Director

Jola Sliwinski has been our “rock”! Dec 05 Crissy Alegria left for a more challenging position at UCHC. In Feb Lucy Piechowski started as Program Asst, part time.

Bill Leslie was our developer half-time. Steve is the new full time applications developer.

***EFTS is grateful for NLM funding for the EFTS program! Looking at user and admin needs, we decided our resources would be better spent by hiring a pt-time Admin and a full time developer. It was impossible for Bill Leslie, working pt, to accomplish what we need. Hopefully with staffing in place we can move forward…

Call the office—we’re here for member support!
### April 2003 --- that was then…

<table>
<thead>
<tr>
<th>Region</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle Atlantic</td>
<td>315</td>
</tr>
<tr>
<td>Southeastern Atlantic</td>
<td>20</td>
</tr>
<tr>
<td>Greater Midwest</td>
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<tr>
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<tr>
<td>South Central</td>
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</tr>
<tr>
<td>Pacific Northwest</td>
<td>14</td>
</tr>
<tr>
<td>Pacific Southwest</td>
<td>35</td>
</tr>
<tr>
<td>New England</td>
<td>194</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>747</strong></td>
</tr>
</tbody>
</table>

2003=747
Although it might be hard to see we have made progress!
2006=1107 +33%

Goal is still to increase participation=self-sufficiency AFTER NLM funding ends—good thru the end of this contract period--2011
As part of the RML contract all Regional Medical Libraries are members.
Will work with them to promote EFTS
Work on getting all resource libraries in each region to join
2005-2006 Accomplishments

- Currency conversion
- Software “bug” tracking
- Advisory Committee meetings
- New member education
- Marketing and promotion
- New promotional items
- Website updates

Now I’d like to take a few minutes to tell you what we’ve been doing…

--Currency conversion software has been completed, it is in test now. We have had problems integrating it into production. Bill, working half time, maintaining the system, just didn’t have the time to work out the problems. Steve will continue to work on the software. The new Canadian currency conversion brochure is completed (see the next slide).

--ADMINISTRATIVE--Bill Leslie formalized tracking software “bugs”. We can now list, describe, prioritize problems…The PRIORITY is and will be member problems, concerns.

--Two Advisory Committee meetings were held in 2005—July/Dec. Minutes of meetings are on website. Members of the AC are also listed. June 1st, 2005 new members started their 2 year terms. All regions are represented.

--Jola/Lucy have been spending time with new members educating them on all aspects of EFTS upon activation of their account.

--Marketing—Always! Can send out promo items—Poster, Brochures, bookmarks, pens, pencils, stickers, for you to display or give out at meetings. We did send out material to meetings in IL, NY, NC. We also will place ads in meeting programs.

****Let us know about meetings in your region, or libraries we should contact. To conserve our resources, EFTS staff will probably only travel to MLA, Canada, and NE!

--Website has been updated—Member policies, FAQ, Glossary—additional suggestions welcome.
Coming Soon…

The EFTS Exchange Process Between Canadian & US Libraries

**Canadian Currency conversion brochure!**

Notice bottom right—how the Online Transaction File and Reports will look for Canadian to Canadian transactions—includes an exchange rate column and the amount in Canadian dollars.
EFTS Works in Progress

- Release currency conversion software
- Kill more “bugs” and add enhancements
- Continue dialogue with CISTI
- Continue software, website updates
- Work with NLM on a Docline/EFTS interface

Working on **currency conversion release**…includes some other “fixes”—ex. **NEGATIVE DEBITS** showing up correctly on member reports (in the details section)

**BUGS/Enhancements**—There is an upload file size limitation that we need to eliminate

Reports—have more than 3 years available online

More instructions in the **Online Transaction File**—ex. How to enter a credit

More detailed information on the transactions processed overnight table on the member messages screen

A batch delete function in the **OTF** error table and more info in the error table—the reason why the request is there

Add a “Refunds” field to member reports (they now show up as a deposit)

****most enhancements are a result of member suggestions****

CISTI membership is under discussion, Steve will work to solve some unique issues

First meeting with NLM to discuss a Doc/EFTS interface. Updating in Docline would build a file that could be uploaded to EFTS, after member review.
Members have asked for a “Release Notes” section when new software updates are implemented.

Will put a link to a list of available promotional items we can send.

Add a more visible link to the Advisory Committee on the EFTS homepage.
Ed Donnald had started to develop some Educational modules for EFTS, ex. detailed “how to” for new members, plans are to continue his work.

Will be reviewing and revising the FAQ, Glossary and Member policies pages
Reminder…

- **Log on!** Check your member account and profile (email address)
- **LIBID** on all correspondence
- **Review** your OTF-Error table
- **AC** representatives in every region

3 things you can do for us…
Log on!
LIBID
REVIEW

Last—discuss issues, suggestions with AC members in your region—information is on the website
We’d now like to open it up for feedback and discussion from you. What things would you like to see? What do you think we can do better? And, how can we increase participation. We’d like to ask for your help in recruiting members.

**NEGATIVE BALANCE** Libraries. We’ve been aggressively calling those libraries, in addition to email sent and system messages.

A question on how far back someone can bill—no rules, but courtesy dictates every month or quarter, excluding extraordinary circumstances.

Suggestion—"search" field for Participant’s List/Add OCLC code to list OTF-manual input-revise process to retain last entered info then “add to file” once.

Member would like to be able to email a report to another branch library (or administrator, library director)

Enlist the help of EFTS “Champions” in each region to help spread the word/help with negative libraries

A note should be sent to a library with a negative balance whenever a file is uploaded

Send articles/press releases to RML newsletters, Chapter newsletters
See you next year!

➤ MLA 2007***Philadelphia
➤ Keep your comments, suggestions coming! We love to hear from you!
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➤ efts@uchc.edu
➤ https://efts.uchc.edu
➤ THANK YOU!