



EFTS

Quarterly

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University of Connecticut
Health Center

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From the Director

by Ralph Arcari

The EFTS staff underwent a reorganization during the summer. Ms. Colleen Giblin relocated within the University of Connecticut Health Center to serve as departmental administrator in Vascular Biology. Colleen served as the EFTS Program Coordinator from June 2002 to June 2004 and was involved in bringing EFTS to the web.

Ms. Jolanta Sliwinski replaced Ms. Giblin as EFTS Program Coordinator. Ms. Sliwinski has worked in the UCHC Library since 1988 in several capacities including Acquisitions and Interlibrary loan. Ms. Sliwinski brings with her experience in two areas of particular importance to EFTS: budget management and resource sharing. Marketing and customer relations are significant aspects of Jola's responsibilities.

Ms. Cristina Alegria joined EFTS in June, 2004 becoming the Program Assistant. Ms. Alegria's duties relate to the EFTS daily operations. Cristina establishes accounts for new members, handles participant deposits, answers e-mail messages and provides telephone support.

Mr. Edward Donald is the EFTS Technical Support Manager. Mr. Donald works on a part-time basis during the evenings, and has primary responsibility for serving as the EFTS liaison with our current vendor for EFTS operational software. Ed also maintains the EFTS web site and listserv as well as write the EFTS quarterly reports submitted to the National Library of Medicine.

Ms. Jacqueline Lewis is the UCHC Library department head to which EFTS reports. Ms. Lewis is in charge of Interlibrary Loan and Circulation Services for the Health Center. Jackie is the EFTS Program Manager and sets and monitors the departmental objectives.

Dr. Ralph Arcari is the UCHC Library Director. Ralph's role with EFTS is to set and achieve long term goals, negotiate contractual services and arrange for the necessary institutional support.

These five individuals make up the EFTS team and each is available to respond to inquiries, questions or concerns. [contact e-mails are listed on page 4.]

Inside this issue:

<i>From the Director</i>	1
<i>File Builder Comes Online</i>	2
<i>See What Others Are Saying @ EFTS</i>	2
<i>Communication is the Key</i>	3
<i>QuickDoc Users, Before You Send in Your EFTS Upload....</i>	3
<i>Get Your Stickers For Those Invoices</i>	4
<i>Helpful Hints</i>	4

EFTS-L Listserv

The EFTS-L listserv is the primary mechanism for communication between Participants and the Office. New participants and software improvements are announced on the list. Participants can also ask questions and share information with others. Information on subscribing can be found under the Tools link on the homepage. Join today.



File Builder Comes Online

by Ed Donald



For the EFTS participants who utilize some sort of ILL management software, such as QuickDOC, Clio or ILLiad, the creation of the transaction data files requires only a few key-strokes. But for libraries that

either use a system that can't create the file or don't use any electronic means of tracking their activity, their only recourse was to use the File Builder Program utility. This program was installed on your PC and allowed the user to "fill in the blanks" for transactions it wanted to bill for. The file then needed to be uploaded to EFTS for processing. In September, EFTS released its Online Transaction Entry system, which replaces the File Builder program and brings this functionality of data entry to the web.

Participants can now log into their account and click on the 'Transaction File' link followed by the 'Build an Online Transaction File' link. There are then eight fields to fill in for the transaction they wish to create; the requestor's LIBID, the request number, the year and the journal or the book title, the author or citation of the loan, the date the loan was filled, the patron (this is optional), whether the transaction is a charge or a refund, and the amount of the transaction. Additional transactions can be added to the online file by clicking on the 'Add to File' button. By clicking on the 'View/Edit Online File Transactions' button, you can see all of the transactions in the online file. Now at this point, they haven't been processed, they're just sitting in an online file. You may edit individual transactions or delete them from the file.

A library can now just jump online and enter a few transactions throughout the month or whenever it's convenient.

At any point in time, the library can click on the 'Upload Transactions from Online File' link, also under the 'Transaction File' link, to submit the transactions in their online file to be processed. All valid transactions will be accepted and processed. Transactions containing an error are returned to the Online File and a report is displayed as to the type of error. Those transactions can then be fixed and resubmitted or left for processing at a future date.

This should also make it very easy for a library to credit back a library it incorrectly charged. Fill in the original transaction data and choose Refund as Charge Type. No more are the days of waiting for the following months paper statement to see if these transactions were rectified. We sincerely hope that this provides a useful and usable tool for libraries that need to charge, even if it's for that one transaction every two months.

* Requestor's LIBID e.g. ARU/ARX	<input type="text"/>
* Request Number e.g. 1482347894	<input type="text"/>
* Year and Journal or Book Title e.g. 1998 Int J Circology	<input type="text"/>
* Author or Citation of the Loan e.g. 1347,659-64	<input type="text"/>
* Date Filled (YYMMDD) e.g. 031126	<input type="text"/>
Patron	<input type="text"/>
* Charge Type	Charge <input type="button" value="v"/>
* Charge (no \$ sign) e.g. 11.35	<input type="text"/> \$USD

See What Others Are Saying @ EFTS

It may seem like preaching to the choir, but for some they may still be trying to convince their administration why joining the EFTS makes financial and productive sense. Or perhaps you know of a colleague who is currently fighting that battle. One resource available on the EFTS website that could be used to support the case is the "What Others Are Saying About EFTS" page. Located under the 'Tools' link on the homepage, it contains quotes from EFTS participants of all sizes and library types as well as a list of links to articles about EFTS available on the web.

If you would like to contribute a quote to our page, we'd love to hear from you. Perhaps you can even convince your administrator or finance person to provide one. If you are aware of any newsletter articles or other resources that reference the EFTS, please let us know so they can be added to our page.

"Participation in EFTS is critical for a hospital librarian short on time and resources" --Mary Jo Dorsey, The Western Pennsylvania Hospital (PAUWPH)



Communication is the Key

by Jola Sliwinski

The summer of 2004 resulted in many exciting changes at EFTS. New staff brought both new ideas and focus to the program. Efforts to expand out participant group are in full force, and we continue being committed to providing the best service possible to our membership. We want to be able to take our direction from the membership. In that goal, several efforts are being made.

Members of the EFTS Advisory Committee were invited to participate in telephone conferences on August 16th and 18th. Program Director, Ralph Arcari shared a significant announcement regarding NLM and its support of the EFTS program. Although our goal continues to be self sufficiency, NLM has expressed the continuation of funding for the program beyond the origi-

nal July 2005 contract.

Travel to MLA Chapter meetings is another outreach effort. Although it is not possible to attend in every region, EFTS staff is making itself known by traveling to several of the regional meetings. The PNR meeting held in Seattle October 2-5 was attended by Ralph Arcari and new Program Coordinator, Jola Sliwinski. Ralph is also attending the SC/MLA meeting in Biloxi October 21 – 25. The GMR meeting in Springfield on October 9 -12 and the UNYOC meeting in Ottawa October 13 – 15 was attended by Jola Sliwinski. Jackie Lewis, Program Manager, attended the Sebasco NAHSL meeting October 3 -5, as well as the Mid-Atlantic meeting October 13-16. It has been a pleasure to meet and talk to our members. We welcome any and all comments about our service.



I would like to invite our current participants, as well as potential new members, to contact EFTS with any suggestions for improving the functionality of our website and service. EFTS is committed to providing a convenient and efficient service to our clientele, and we are consistently working with our software developers to enhance the EFTS. I look forward to hearing from you.

-Cristina

QuickDoc Users, Before You Send in Your EFTS Upload....

by Dorothy Kalahan

Be sure you have updated all new members and their requests before creating the upload file.

EFTS sends out e-mails listing new members, but you can also find new members on the EFTS website, by looking at the Participants list and sorting it by date joined, to find the newest members. They'll be at the bottom of the list.

In QuickDoc, search the new members by LIBID in the Library List. If the box in the lower left says EFTS=No, then you need to change that member's information. Click the Charges tab, check off the EFTS Payment Supported box and change the Pref Payment Method to EFTS. Save the changes.

Check to see if you have filled any requests for the new members. In the Lend Tables, you can limit by the appropriate dates and search for lends by LIBID. If any of the fills says "no" under EFTS, simply change it to "Yes", then save the changes.

Find a Mentor

If you have questions about using QuickDOC, Clio or ILLiad with EFTS then take a look at the Mentor's List on the EFTS website. It's located under Tools and lists current participants willing to talk with you about issues in using these ILL management programs with the EFTS.



Get Your Stickers For Those Invoices You're Still Sending Out

Help get more libraries signed up to use the EFTS. You can contact the office and request stickers to be sent to you. They can be affixed to the invoices that you're still sending out to libraries you'd like to encourage to join the EFTS. These four color stickers provide the tag line "If you belonged to EFTS, this bill would already be paid." along with the website and toll free phone number. The office has already received calls from libraries inquiring about the service as a result of the sticker. Call today for yours. You can also download the template from our website (under Tools) and print your own on Avery label stock.



Helpful Hints

By Janice Otulak

For those libraries who have not already done so, it would behoove you to change your routing tables to include EFTS/ARIEL libraries in the first cells to insure timeliness and ease of billing in loan fulfillment. Libraries not using these services should be relegated to lower tables as they represent a decrease in efficiency in filling ILL requests.

Other helpful hints would include:

- Log into your EFTS account on a regular basis and check your balance and account activity.
- Review your Member Profile information at least annually.
- Include your LIBID on all correspondence and checks submitted to EFTS.
- Sign up for the EFTS-L listserv, it's not automatic upon joining EFTS.

The EFTS Quarterly newsletter provides EFTS staff with another opportunity to share news and information with you, the EFTS Participants.

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