

I-Share Users' Group Charge  
Approved by IUG, November 13, 2008

### **Purpose**

The I-Share Users' Group (IUG) serves to coordinate the consortial aspects of the I-Share system, developing best practices and seeking and promoting opportunities for consortial collaboration in support of greater efficiency and better service to member libraries and users.

### **Functions**

- The I-Share Users' Group (IUG) coordinates, facilitates and supports the work of its subordinate function-based teams regarding I-Share system efficiencies and functionalities.
- System-related areas addressed by IUG and its functional teams include, but are not limited to acquisitions of all formats of materials; cataloging, authority control and metadata creation; maintaining adherence to pertinent standards; creating a sustainable, accessible, easy-to-use and high-performance online public access catalog; enhancing system capacity for search and retrieval of data; delivery of content; and resource sharing.
- Specific activities of IUG and its functional teams also include, but are not limited to, preparing recommendations concerning specification, selection, implementation, and ongoing instruction and support for tools and services related to the respective functional areas; facilitating topical discussions by means of face-to-face forums and electronic communications; and assisting the CARLI Office in planning educational and training workshops for the membership.
- IUG participates in the evaluation of broader initiatives and service innovations beyond the consortium and makes recommendations for their implementation to benefit I-Share member libraries and CARLI as a whole.
- IUG develops programs and incorporates elements of pertinent CARLI initiatives and program recommendations received from the I-Share Teams and the I-Share membership.
- IUG suggests mechanisms to assess our consortial operations, and to identify good models, appropriate metrics, and best practices in our consortial efforts.

### **Relationships**

- The I-Share Users' Group (IUG) advises the CARLI staff and the CARLI Board on issues related to the I-Share membership, including the functional aspects of the shared ILS and related systems, and consortial policies, practices and future directions.
- IUG communicates with member libraries and other CARLI bodies to facilitate programmatic cooperative initiatives.
- The IUG will provide this coordination and facilitation with particular reference to the CARLI strategic plan and with the explicit consideration of all CARLI members.

## **I-Share Acquisitions and Serials Team: Charge (DRAFT 10/31/08)**

The I-Share Acquisitions & Serials Team focuses on the operational effectiveness and development of functionality related to Acquisitions and Serials processes in the consortium's ILS product(s), current and future. Because no system operates in isolation, from time to time the Team may also share expertise and communicate issues, concerns, best practices, innovations, and emerging trends in acquisitions and serials librarianship in general to the CARLI membership and/or governing bodies.

Specific responsibilities of the Team include:

- The I-Share Acquisitions and Serials Team advises the I-Share Users' Group (IUG) and the CARLI staff on issues related to the shared integrated library system and related systems and consortial policies, practices and future directions as outlined in the Team charge
- To investigate member library needs for assistance with the ILS product or with acquisitions/serials processes in general, recommend mechanisms to the CARLI staff and/or governing bodies by which this assistance could be provided, and assist in the implementation of recommended mechanisms when appropriate.
- To develop consortial-wide documentation, best practices, training resources, continuing education opportunities and communication mechanisms to assist the membership in the use of the ILS product, its interoperability with other consortially-licensed products, and/or with acquisitions/serials processes in general.
- To provide mechanisms whereby member libraries can communicate with each other and can share and access locally-developed materials such as documentation, best practices, training materials, reports, etc. related to the ILS product or acquisitions/serials processes.
- To identify and document problems or issues with the ILS product and communicate them to CARLI staff.
- To assist CARLI staff as needed with testing, documentation and training issues related to ILS product upgrades or conversions.
- To collaborate with other CARLI groups as appropriate to maximize resource and knowledge sharing within the consortium.

ICAT Charge final revision 11/11/08

- The I-Share Cataloging and Authority Control Team advises the I-Share Users' Group (IUG) and the CARLI staff on issues related to the shared integrated library system and related systems and consortial policies, practices and future directions as outlined in the Team charge
- Share expertise and communicate issues and concerns, such as workflow options, troubleshooting, and best practices in the area of cataloging and authority control.
- Monitor and make recommendations regarding developments and emerging trends in cataloging as they relate to the I-Share environment.
- Takes the lead in coordinating metadata creation and maintenance as appropriate across CARLI-provided products and services.
- Collaborate with other CARLI groups to maximize resource and knowledge sharing within the consortium.
- Review and revise if necessary the consortial cataloging standards in relationship to the I-Share environment.
- Support authority control work in a distributed environment.
- Develop consortial documentation, resources, training and other continuing education opportunities to assist the membership in the use of the ILS product (hereafter referred to as "the product").
- Document best practices for use of the cataloging component of the product in and among member libraries and best practices for its interoperability with other consortially- licensed products.
- Identify and document problems and issues with the product.
- Assist CARLI staff with testing, documentation and training issues involved with product upgrades, as needed.
- Suggest database clean-up and other projects to improve overall bibliographic quality in the I-Share catalogs.
- Plan and provide continuing education opportunities related to cataloging and authority control in the distributed I-Share environment.
- Ensure that users of the product have communication mechanisms for sharing information related to the use of the product and a means to share locally developed materials such as documentation, best practices, reports, etc.
- Determine libraries' needs for assistance with local work, and recommend mechanisms by which this support may be provided.

## I-Share Instruction Team Charge

- The Instruction Team advises the I-Share Users' Group (IUG) and the CARLI staff on issues related to the shared integrated library system and related systems and consortial policies, practices and future directions as outlined in the Team charge
- Share expertise and communicate issues and concerns, such as workflow options, troubleshooting, and best practices in the area of OPAC instruction.
- Survey member libraries to investigate end user instruction needs, utilization of Committee services and resources, and current instructional practices.
- Compile end user instruction tutorial best practices and product recommendations.
- Develop consortial documentation, resources, training and other continuing education opportunities, including forums, trainings, and other types of information-sharing sessions for member libraries, focused on end user instruction topics.
- Promote communication mechanisms among member libraries for the purpose of sharing information related to the use of the OPAC and other CARLI-supported products.
- Collaborate with other CARLI groups to maximize resource and knowledge sharing within the consortium.
- Assist CARLI staff with testing, documentation, and training issues involved with OPAC upgrades, as needed.

## **I-Share OPAC Team**

### **Body to which the group reports: I-Share User Group (IUG)**

- The I-Share OPAC Team advises the I-Share Users' Group (IUG) and the CARLI staff on issues related to the shared integrated library system and related systems and consortial policies, practices and future directions as outlined in the Team charge
- Share expertise and communicate issues and concerns, such as workflow options, troubleshooting, and best practices in the area of the design of the shared public interfaces of the catalog (i.e., the OPACs).
- Specifically, maintain review process for OPAC development done by member libraries to gather good design ideas and to ensure customizations are within established guidelines.
- Maintain consortial customization guidelines for local OPACs including review process to modify these guidelines.
- Advise CARLI staff on the development and improvement of the local OPACs default versions for I-Share libraries.
- Advise CARLI staff on the development and improvement of consortium wide OPACs for I-Share libraries.
- Cooperate with other CARLI bodies to encourage improvements to the OPACs via such methods as performing usability testing, developing instructional materials, offering public services forums, developing testing scripts and mechanisms, pooling development effort, and other appropriate projects.
- Develop best practices, bug reports, feature requests, and other consortial documentation; communication mechanisms; and resources for training and other continuing education opportunities to assist the membership in the use and development of the OPACs.
- Investigate member library needs for assistance, and recommend mechanisms by which this support is provided.
- Assist CARLI staff with testing, documentation and training issues involved with upgrades, as needed.

## I-Share Resource Sharing Team

Body to which the group reports: I-Share User Group (IUG)

- The Resource Sharing Team advises the I-Share Users' Group (IUG) and the CARLI staff on issues related to the shared integrated library system and related systems and consortial policies, practices and future directions as outlined in the Team charge
- Specifically, assist with training and instruction of issues pertaining to resource sharing, including all aspects of inter-library loan, circulation and remote borrowing.
- Help to review and establish best practices regarding resource sharing in a consortial setting.
- Document best practices for use of the resource sharing component(s) of the ILS product (hereafter referred to as "the product") in and among member libraries and best practices for its interoperability with other consortially- licensed products.
- Develop consortial documentation, resources, training and other continuing education opportunities to assist the membership in the use of the product.
- Identify and document problems and issues with the product.
- Ensure that users of the product have communication mechanisms for sharing information related to the use of the product and a means to share locally developed materials such as documentation, best practices, reports, etc.
- Investigate member library needs for assistance, and recommend mechanisms by which this support is provided.
- Collaborate with other CARLI groups to maximize resource and knowledge sharing within the consortium.
- Assist CARLI staff with testing, documentation and training issues involved with product upgrades, as needed.
- Specifically, assist with training and instruction of issues pertaining to resource sharing, including all aspects of inter-library loan, circulation and remote borrowing.