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# I-Share Acquisitions and Serials Team Minutes for July 13, 2006

Consortium of Academic and Research Libraries in Illinois

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## I-Share Acquisitions/Serials Team Meeting Minutes

**July 13, 2006**

**Present:** Cindy Fuller, MIL; JoAnn Hounshell, IIT Kent; Ete Olson, NIU; Ann Riley, SIE; Tammy Schnell, LLC; Ted Schwitzner, NCC; Todd Spires, BRA; Rachel Wightman, NPU; Anne Hudson, CARLI; Jen Masciadrelli, CARLI

**Absent:** Wendy Shelburne, UIU

**Special Guest via Phone:** Carlos Melian, NEI, past chair

1. Introductions: each Team member was introduced, with a brief description of current duties and interest in this Team.
2. The minutes of the previous IAUG Acquisitions/Serials Task Force June 12, 2006, meeting were approved.
3. Chairperson(s): Cindy Fuller and Tammy Schnell were elected as co-chairs of the Team.
4. Minute takers: Minute takers will be named in alphabetical order of the Team members; the co-chairs are exempt. (See dates of future meetings below for these assignments) Minute taker for this meeting is Anne Hudson.
5. Terms: By random drawing, Team terms were determined:
  - 1-year: Cindy Fuller, Ete Olson, Rachel Wightman
  - 2-year: JoAnn Hounshell, Todd Spires, Wendy Shelburne
  - 3-year: Ann Riley, Tammy Schnell, Ted Schwitzner
6. Open Business:
  - a. Combined forum on the implications of shifting from print to electronic materials: This topic generated quite a bit of discussion which revealed just how large, important, and diverse this topic is. Several suggestions for next steps were made: the IUG was meeting the next day and Carlos volunteered to ask for its advice on how best to proceed; perhaps a separate sub-group of the IUG should plan this, as it has implications for many of the Teams within IUG; could the recent Science Serials project provide some fodder?; how to include the scholarly communication aspect and the document delivery/ILL aspects.  
Format suggestions for the forum included: a 3-day forum, with one day devoted to Mechanics, Scholarly Communication, and Collection Development; or, have each IUG Team support a 1-day forum on its particular focus on the issues, e.g., Acq/Ser focus on mechanics, and use this model for a entire year's series of fora. Concern was expressed that there is no IUG Team that focuses on Collection Development, but perhaps this could be addressed by the Collections Working Group. Carlos promised to report back to the Team on what he learned at the IUG meeting. [Ed. note: at that meeting, Carlos was appointed the IUG liaison to this group]
  - b. Access queries for line item/invoice pairs for FPC: Anne Hudson had promised to do individual Access queries for each of the Line Item Copy Status/Invoice Item Status pairs as documented in table 16-1 of the Acquisitions User's Guide. She reported that these are still in progress, but will be available on the I-Share Shared SQL page when ready.
  - c. Serials issues not appearing in problems list: this topic was raised in May on Voyager-L and Anne had inquired if anyone on the Team had noticed this problem. No one had, and it was noted that no one had replied to the Voy-L message, so the topic is now officially dropped.
  - d. Documentation for complex serial patterns: It was agreed that some sort of documentation on how to create these is necessary. Ted Schwitzner offered to assist Jen Masciadrelli with it. Jen promised

to distribute what documentation was already on hand from Endeavor and End User to the Team. There were also recommendations that a half-day workshop or online tutorial (Camtasia based?) be developed, because simple print documentation will not be enough. It was strongly suggested that a “sharing” place, similar to the Shared SQL page be created so that screen shots or other representations of complex patterns that member create can be accessible to other members.

- e. Updating and “CARLI-izing” existing Acq/Ser documentation: From the existing I-Share Acquisitions & Serials “Selected Documentation” page, the following assignments were accepted for updating (with more complete information, if available) and CARLI-izing:

Claiming: JoAnn

EDI and EOD:

EDI and EOD Files Diagram: Anne

Getting Started with EDI: Ann

Getting Started with EOD: Ete

Fiscal Period Close: Anne

Ledgers and Funds: Ted

Purchase Orders:

Quick Guide to Setting Up.....: Jen

Standing Orders: Tammy

Workflows:

Voyager Acq Module Session Defaults.....: Ted

Acq Keyboard Equivalents: Jen

Rachel and Todd will be the general proof-readers, as they will have “fresh eyes” for the reviews.

It was agreed that the revised documentation will be ready for review by the entire Team at its August meeting.

- f. Continue open conference calls? The Team agreed that these would be scheduled through December 2006 on their existing schedule of the first Thursday of each month, 1:30 – 2:30 p.m. The effectiveness of these calls will be evaluated in late fall 2006 to see if they should be continued. Every other call should have an announced “topic” involving electronic resources. The August 3rd call will be announced as an opportunity to discuss anything related to post-upgrade issues: new problems? new solutions?

Schedule: August 3, September 7, October 5, November 2, and December 7. The phone number for each is 217-265-8030.

- 7. Team meeting schedule: A regular schedule of Team meetings for the remainder of 2006 was set up on the second Thursday of each month, 11:00 a.m. – 2:00 p.m. A call-in option is available for each meeting:

217-265-6999. The schedule and minute takers are:

August 10 – JoAnn Hounshell

September 14 – Ete Olson

October 12 – Ann Riley

November 9 – Ted Schwitzner

December 14 – Todd Spires