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# I-Share Resource Sharing Team Minutes for August 1, 2006

Consortium of Academic and Research Libraries in Illinois

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## I-Share Resource Sharing Team Meeting Minutes

**August 1, 2006**

**Present:** Lynn Bierma, Claudia Davidage, Susie Duncan, Peggy Glatthaar, Sherry Gogo-Madsen, Andrea Morris, Kathleen Roegge, Deborah Stevenson, Mel Farrell, Lorna Engels, Jennifer Hansen-Peterson (via conference call)

**Absent:** Pat Woodworth

Mel Farrell called the meeting to order at 10:30 am.

Betsy Kruger has asked to step down from the committee. Susie Duncan is attending in her place for this meeting. A replacement will have to be appointed. Jennifer will inform IUG chair for appointment of replacement with committee's recommendations.

Committee introduced themselves

Committee chairperson needed to be chosen. A new chair will be chosen every year. The duties include:

- Coming up with an Agenda for the monthly meetings.
- Leading the meetings
- Developing the annual report to be given to the IUG at the end of the year

Lynn Bierma volunteered to chair the committee this year. Committee approved.

As per By Laws the committee position is a 3 year term. To get this set up the committee will rotate out some of its members. 9 total members – Committee should be comprised of 3 – 3 year members, 3 – 2 year members and 3 – 1 year members

Committee members decided:

- 3 Year Term – Andrea Morris, Pat Woodworth, and replacement member
- 2 Year Term – Sherry Gogo-Madsen, Lynn Bierma, and Deborah Stevenson
- 1 Year Term – Kathy Roegge, Peggy Glatthaar, and Claudia Davidage

First order of business – Go over documentation that is currently residing on the ILC SO website and add any new documentation. Once documentation is reviewed and revised it will be transferred to the new CARLI website.

Committee looked at each of the following and assigned revisions to committee members as follows:

- **Procedures and Workflows**
  - **Circulation Filled Requests Workflow** (pdf is passworded – Note: future CARLI site will have documentation behind an authorization so document by document passwording will not be used)
    - Old document – needs to be totally revised
    - Need new screen shots to show Barcode Look up
    - Assigned to Andrea Morris
  - **How to Place a Request in WebVoyage**
    - Needs to be revised

- Assigned to Lynn Bierma
- **ILCSO Library Procedures for Processing ILLINET Library and Regional Library System Requests**
  - Revisions needed
    - Certain steps should be marked as optional regarding the printing of slips
  - Include Barcode Look up
  - Assigned to Peggy Glatthaar
  - **Lost Item Procedures: Workflow**
  - Many libraries have many different workflows
  - Need to include options for Bursar transfer
  - Responsibility of blocking and notification
  - Assigned to Claudia Davidage and Susie Duncan
- **Onsite Reciprocal Borrowing by Patrons from New ILCSO Member Libraries**
  - Assigned to Mel Farrell and Lorna Engels
- **Request Processing While in Call Slip Daemon**
  - Need to revise to include both UB and Local Call slip processing.
  - Add 6.1 capabilities – changing copy numbers and Call slip Queue reassignment.
  - Assigned to Sherry Gogo-Madsen
- **Reserves : Set Up and Workflow**
  - Assigned to Claudia Davidage
- **Best Practices & Recommendations**
  - **Best Practices for Blocking and Expiring Patron Records**
    - Some revisions needed
    - Assigned to Deborah Stevenson
  - **Best Practices for Monograph Interlibrary Loan**
    - Assigned to Mel Farrell and Lorna Engels
  - Best Practices Recommendations : Call Slip Processing when Library is Closed, Hold Shelf Life Setting, and Printed Notices and Patron Confidentiality**
    - These issues should be split up.
    - Need to take in to consideration Closed Days and calendars
    - Assigned to Lorna Engels and Mel Farrell
  - Best Practices for Placing Recalls on Local Items: Voyager Circulation Module**
    - Need to “Consortial-ize” this document
    - Need broader parameters
    - Assigned to Peggy Glatthaar
  - **Best Practices: Universal Borrowing**
    - Assigned to Lorna Engels and Mel Farrell
  - **UB Troubleshooting**
    - Need to create a 6.1 version
    - Assigned to Mel Farrell and Lorna Engels
- **Policies**
  - **Circ/ILL Policies: A Chart of I-Share Library Practices**
    - This document is updated regularly and is current
  - **ILCSO Fines and Fines Notice Policies**
    - Assigned to Mel Farrell and Lorna Engels

- **ILCSO Library Billing Practices**

Tie this into Lost Item Procedures and Workflow Documentation

- Assigned to Susie Duncan and Claudia Davidage

- **ILLINET Interlibrary Loan Code**

- State of Illinois document – no changes

- **I-Share Online Library Resource Sharing Code**

This document has been looked at by the Board and some cosmetic changes have already been made. This is step one.

Other changes may be made at a later date. This committee does not have to change anything on this document.

- **Notices and Reports**

- **Circulation Reports: Voyager and Access**

Mel will forward this document to Cathy Salika to update with 6.1 changes.

- **Dead Requests Report**

Assigned to Mel Farrell. Mel will ask Gordon Fellows to assist

- **Item Record Deletion in Your Voyager Database: New Approach for Library Statistics**

- Needs to include 6.1 version changes
- Needs cosmetic changes
- Assigned to Lorna Engels and Mel Farrell

- **What ILCSO Libraries need to know about running Voyager Circulation Notices and Hold Shelf Reports**

- Includes higher levels of Access
- Needs to include E-Mail options

Circ jobs are now split and in what order they are run is important. Ex: Items on someone's hold shelf have expired are shown as available and can be requested – loses the status. Circ job 19 is now run first and may have fixed this. CARLI is still looking into this.

Assigned to Lorna Engels and Mel Farrell. Mel will ask Gordon Fellows to assist.

- **General Information and FAQs**

- **Callslip/UB Workshop**

- This is under revision by CARLI staff

- **Circulation and Universal Borrowing: Frequently asked Questions**

Tie this in with the UB Troubleshooting Best Practices Document

Get rid of UB Troubleshooting document and merge into Circ/UB FAQs

- Assigned to Kathy Roegge
- Version 6.1 issues assigned to Mel Farrell

- **Frequently Asked Questions About Patron Barcode Issues**

- Are these still issues?
- Assigned to Casey Sutherland, Mel Farrell and Lorna Engels

- **ILCSO Barcode Formats**

- Document is current

- **ILCSO Library Item Barcode Prefixes (Sorted by Library)**

- Document is current

- **ILCSO Library Item Barcode Prefixes (Sorted by Prefix)**

- Document is current

- **ILCSO Voyager Item Type Codes**

- Assigned to Lorna Engels and Mel Farrell
- **ILDS Routing Label**
  - No change
- **ILDS Routing Label Abbreviations**
  - No change

**Intersystem Library Deliver Service (ILDS)Addresses: CARLI/ILCSO Libraries**

- No change
- **How to access the Voyager training databases**
  - Assigned to Mel Farrell and Lorna Engels

▪ **Configuration and Technical Information**

- **Batch Loading Patron Data into Voyager Databases**
  - No change

*Side Note:* CARLI is looking into Patron Data Programs such such as: Paul Asay's SIF Viewer (not yet upgraded to 6.1) which takes the data from the SIF and shows you where it will end up in the Voyager fields and Riesterer's (sp?) SIF Maker Breaker which is an On the Fly file in SIF format. This is currently available on Support Web Resource Sharing Site. After this is investigated and if these are recommended this Committee will go forth with documentation.

- **Bursars Transfer**
  - Need to change for 6.1
  - Assigned to Lorna Engels and Mel Farrell
- **Call Slip Item Required**
  - Current
- **Configuring Reporter for Email Notices**
  - Assigned to Mel Farrell and Lorna Engels
- **Call Slip Guide: Configuration and Workflows**
  - This is an Endeavor document.
  - Remove until it is upgraded for 6.1
- **Callslip ini**
  - Need to give more background.
  - Assigned to Kathy Roegge
- **Example Routing Slips**
  - Tie in with callslip ini document
  - Assigned to Kathy Roegge
- **How Circ SysAdmin Values are used During a Checkout**
  - Needs to be updated
  - Assigned to Deborah Stevenson
- **Links from SILC to I-Share**
  - Assigned to Lynn Bierma
- **Sample File of Patron Data**
  - Document is current
  - Assigned to Lorna Engels and Mel Farrell for cosmetic changes
- **System Administration Training Materials**
  - Currently being worked on by CARLI staff
  - Assigned to Lorna Engels
- **UB Patron Mapping Worksheet**

- Current

### **Voyager System Administration: Configuration for ILCSO Fines/Fees Notices**

- Assigned to Kathy Roegge

- **Discussion of other ideas for this committee to investigate and ideas to add to the current documentation**

Committee to look at Endeavor site and draw pieces of information into our revisions of I-Share documentation.

Need to add Damaged Items procedures/best practices to current documentation. Kathy Roegge and Holly Dankert were already working on this documentation. Continue to write Best Practices for Damaged Items. Assigned to Kathy Roegge and Deborah Stevenson

Billing Recommendations – recommendations were written by IUAG CUB and given to IUAG. These Best practices were to be looked at by UIUC legal staff. No word on this yet. Jennifer Hansen-Peterson will bring this up to IUG

Need to investigate problems with items that Hold shelf life expires on the same day that the patron picks up and tries to checkout. So far no “work a-rounds” will work. Seems to be a link between Hold Life and Hold Shelf Life in the UB environment with 6.1 changes. Need to investigate which policies kick in when. Mel will contact Endeavor to clarify this in hopes of a solution to this problem. Committee to give Mel scenarios to present to Endeavor.

- Keep investigating Circ Alerts and 6.1

Add new section to documentation called “Issues” that will list Upgrade issues that are currently listed in the Upgrade portion of the CARLI website

Need to address Reserve issues. Look at incidents on Support Web regarding Reserves and 6.1. 6.2 patch may take care of some of these issues. Deborah Stevenson will look at this.

Lynn began discussion of OCLC’s Remote Circulation – WorldCat Delivery. This will update Voyager data when OCLC is updated. Committee would like to make Endeavor aware of our interest in the possibility of Voyager working with OCLC in this way. Committee would like to bring this to IUG’s attention to then pass on to the Products and Services Vetting Committee. Jennifer stated she would contact the chair of IUG to put this item on their 8/15/06 Agenda. Discussion of Web 2 next generation of the web and its implications on our resource sharing environment.

Desk top delivery – use of stand alone Odyssey for CARLI Libraries. Susan Singleton is aware of this option and is sending this to the Products and Services Vetting Committee.

How to handle traditional ILL (OCLC) and UB as two separate systems. Possible Forum on this issue – have different libraries send in and present their Best Practices and Procedures for dealing with this issue. Also a possible presentation for ILA

Time frame for assignments – 2 months – Have rough draft done by 9/12-9/15 send to committee members and discuss at next meeting.

- Next meeting of the I-Share Resource Sharing Team will be by conference call Tuesday, 9/19 at 1:30. Phone numbers will be sent to members.
- Meeting adjourned 1:55 pm.

Respectfully submitted,  
Deborah S. Stevenson  
*Rev 8/3/06DS*