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I-Share Resource Sharing Team Minutes for September 19, 2006

Consortium of Academic and Research Libraries in Illinois

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IShare Resource Sharing Team Meeting Minutes

9/19/06

Rev.10/10/06DS

Present: Lynn Bierma, Claudia Davidage, Peggy Glatthaar, Sherry Gogo-Madsen, Andrea Morris, Kathleen Roegge, Kathy Rogers, Deborah Stevenson, Pat Woodworth, Jennifer Hansen-Peterson, Mel Farrell and Lorna Engels

Guest: Susan Singleton

Lynn called the meeting to order at 1:30 pm.

[Minutes of the August 1st meeting were approved.](#) Mel will post these.

Lynn introduced and welcomed Kathy Rogers from Lincoln Land Community College as our newest member chosen by IUG to replace Betsy Kruger who had to step down from the group.

Lynn will send Susie Duncan a Thank You note for her help at our first meeting.

Lynn reassigned website revision items that were given to Susie at the last meeting. Kathy Rogers will help Claudia and Sherry with revisions on the ILCSO Billing Practices document. Group discussed this document and decided that this would be a Recommendations Document not a Best Practices document.

Lynn introduced our guest Susan Singleton the Assistant Vice President and Executive Director CARLI Administrative Services.

Susan spoke to the group on the issue of investigating the Odyssey system. Points brought up were as follows:

- New process for looking into new products. Suggestions go to the new CARLI Product and Services Vetting Committee
- A suggestion was brought to the Vetting committee by Jay Starratt, Brad Baker and Susan Singleton to look into an I-Share wide use of the Odyssey system for document delivery.
- Copy of a memo from David Carlson, chair of the Vetting Committee was sent to each IShare Resource Sharing Team member by Lynn asking for the committee's analysis and recommendations of this resource by January 1, 2007.
- Susan has looked into this system and its use by other consortia. OhioLink began using Odyssey November 2005 and made it a requirement for all OhioLink members to use this system. 75-80% of the libraries are using Odyssey. WILS is using Odyssey as well. The full ILLiad system, which Odyssey is a part of, was purchased for all 26 libraries in the WILS consortium. WILS has not required the use of this system but has strongly recommended its use.
- Points the Vetting committee would like the IShare Resource Sharing team to look at:
 - What are the maintenance and support requirements? What level of support would be required of CARLI staff for state-wide installation and ongoing maintenance? What type of IT support will be needed on the individual library level?
 - Should Odyssey be a requirement for all CARLI libraries as OhioLink and VIVA consortium have done? What would be the benefits and/or problems of such a recommendation?

- Many libraries are already using Ariel which has much of the same functionality as Odyssey. Would current Ariel libraries have to continue to support, use and pay for Ariel if they are required to do so for participation in other resource sharing consortia? What are the implications of dual support for Odyssey and Ariel by libraries who must continue with Ariel?
 - Is it possible to integrate statistics from Odyssey with other ILL related products and services, such as OCLC and Ariel? Would Odyssey be another separate and non-integrated source of statistical data?
- Committee discussed how to approach investigation.
 - Committee to look at OhioLink libraries to get more information. Possibly each member to take an OhioLink library to contact.
 - Look at information about the use of Odyssey on ILL listservs – ILLiad-L, Ariel-L as well as any others.
 - Have members download the software if able to do so and report to the committee of the experience and use. Lynn will do this at her institution.
 - Deb will send the Odyssey Standalone FAQ doc that was created for OhioLink to the committee
 - Lynn will respond to David Carlson that the committee will look into the Odyssey software
 - The I-Share Resource Sharing Team will respond to the Products and Services Vetting committee with recommendations and findings by January 1, 2007.
 - The committee will recommend to the Vetting Committee that a survey should go out to CARLI libraries after our findings have been passed on to the Vetting committee.
- Reports on the revised documentation
 - Lynn – finished with the revisions for Options for Configuring Links for OCLC FirstSearch to IShare OPACS document and is still working on Placing a Request in WebVoayge. Pat Woodworth will help her with this revision. Lynn will send information to Pat.
 - Claudia – Reserves – Set Up and Workflow done. Still working on the Lost Item Procedures document and ILCSO Item Billing Practices with help from Sherry and Kathy Rogers.
 - Mel and Lorna – Several done. Still need to collaborate with other CARLI staff on remaining documents.
 - Peggy – Looked at ILCSO Library Procedures for Processing ILLINET Library and Regional Library System Requests – this has been recently updated and is fine. Still working on Recalls document. Suggestion to call this document a recommendation not a best practice because each library has their own policy regarding Recalls. Mel suggested the basic ideas to incorporate into this document should be No Administrative Recalls should be done and Should not allow patrons to place a recall from the OPAC. Should recommend that patrons should UB request instead of recall items.
 - Sherry – Request Processing While in Call Slip Daemon – mostly done – added new features from 6.1 and needs to add some screen shots. Mel recommended that all documentation should be in doc form to allow for edits. CARLI staff will convert all when done to pdf.
 - Andrea – Circulation Filled Requests Workflow – Almost done. Is having her ILL staff look at it first before sending it to the group.
 - Kathy Roegge – Circulation and UB Borrowing – FAQs – Still working on this.
 - Deb – Best Practices for Blocking and Expiring Patron Records – done needs new links to other documents within this documentation. CARLI staff will add. How Circ Sys Admin Values are used During Checkout – done. Looked into the status of E-Reserves incident report on the Endeavor site. This is still an active incident. Will send some E-Reserves recommendations to Claudia to add

to Reserves.

- Pat – working with Lynn on Placing Requests in Web Voyage
- Kathy Rogers – working with Claudia and Sherry on Billing Practices document
- WorldCat Delivery – Lynn reported the following:
 - Committee through Jennifer recommended that IUG look at WorldCat Delivery that will update Voyager data when OCLC is updated. Lynn brought this to the IUG meeting. IUG needs more information and details of this system.
 - Lynn contacted the Product Manager for WorldCat Delivery for FAQs to pass on to IUG so they are more knowledgeable when suggesting to the Vetting Committee to approach Endeavor. Lynn will pass on information to Jennifer who will pass on to IUG who will in turn pass the information on to the Vetting Committee.
- IShare Resource Sharing Team Contact Information
 - Verified that all information was correct
 - Lynn will send out as a final document
- IUG Report – Jennifer
 - IUG met on 8/15 and 9/8. Next meeting in October at ICC Peoria
 - WorldCat Delivery was presented to IUG from IShare Resource Sharing Team
 - End of Year Billing Document was discussed. Cathy Salika took this document to the CARLI managers meeting. This document will be incorporated in the new Resource Sharing Code which is being worked on now and will be finished by June 2007.
 - Acq/Ser Group will hold a Forum 12/7/06 at Governor's State
 - Cataloging Group – ICAT – will hold a Forum at UIS on 11/1/06 which will include searching tips, Cataloger's Toolkit, and Cataloging guidelines
 - OPAC team – prioritizing what they want to do. Looking into re-indexing to include initial articles (a, an, the) in titles, and a spell checker for the OPAC
 - Kris Hammerstrand's report – working on the new CARLI site – cutover to the new site should be in the Fall
 - Suggestion was brought to IUG to look at Media Scheduling – Stephanie Atkins, Lorna and Mary Laskowski will be working on this
 - Discussion of recognition of people who have worked on consortia committees.
 - New Libraries are coming to CARLI – discussion of Library Mentors- Larissa Moebis and Jennifer looking into coming up with a list of what might be expected of a mentor library. Volunteers to mentor will be sought.
 - Product Services Vetting Committee – looking into Endeavor's Analyzer product, which will help with report generation
- CARLI Update – Mel and Lorna
 - Revamping the CARLI site – new searching and calendaring capabilities
 - Hold Shelf Life Archive recommendation was sent out
 - CARLI staff working with Endeavor staff to solve issues and passing on the information to the CARLI community
 - Once issues are resolved CARLI will reassess SYS Admin settings and reintroduce new capabilities we have currently “turned off” such as the Circ Alerts capabilities.
 - Cluster Error issue should be resolved by the end of the week if all have changed their settings as per CARLI recommendation
- ILLINET Interlibrary Loan Traffic Form Instructions – Lynn

- Lynn was approached to look at the form and create instructions for libraries to follow when filling out this data. Lynn is working with Cathy Salika on this.
- When instructions are done they will be posted on certain Listservs and websites. CARLI can decide if their site is another place to post these instructions. Instructions will also be attached to the form for next year.
- Suggestion from Lynn to use Blackboard as a place to save all documents for the IShare Resource Sharing Team – committee discussed and decided not to use Blackboard but to save all documents in their own individual files.
- Forum Planning
 - Late Winter - February
 - Location – CARLI Training coordinator will look into what institutions are available and what resources each can offer
 - Possibly Chicago area
 - Travel costs have become an issue with many libraries
 - Web conferencing would solve this.
 - CARLI is looking into Web Conferencing software and should have something possibly next year. Once that is in place we can present our forums in person and also via Web Conference
 - At this time all groups are presenting face to face forums
 - Need ideas for the forum from committee members
 - Look at dates to avoid in February
 - E-mail ideas to the group
 - Formalize ideas at next meeting
- Next Meeting – October 16, 2006 1:30 – 3:00 – Mel will set up call and e-mail the number to the group.
- Meeting adjourned 3:05pm

Respectfully submitted,
Deborah S. Stevenson