11-10-2006

I-Share Users' Group Minutes for November 10, 2006

Consortium of Academic and Research Libraries in Illinois

IUG Meeting Minutes

CARLI Office Conference Room
November 10, 2006, 10:00-3:00

Conference Call Option: 217-244-7526

Present: Stephanie Atkins (UIU), David Bell (EIU), Xiaotian Chen (BRA), Felix Chu (WIU), Tom Goetz (WHR), Stephanie Graves (SIC), Jennifer Hansen-Peterson (AUG), Carlos Melian (NEI), Larissa Moebs (ICC), Paige Weston (CARLI).

Phone: TJ Urbanski (ISU), Tony Glass (ERK).

Absent: Judy Anderson (SVC), Kris Hammerstrand (CARLI), Cathy Salika (CARLI).

1. Announcements: None
2. Approval of minutes for October 13, 2006 meeting: Approved with minor changes. Carlos and Larissa gave the corrections to Paige who will put the minutes on IUG's web page.
3. Committee/Task Force Reports

Acquisitions & Serials Team: Carlos Melian – The call for registration is open for their December 7 forum at Governor's State. Their next meeting is Friday, November 17. The team will be sending a small survey to gauge interest with the open conference call. Some calls have been very well attended, and others not. The team is exploring a change in format or other possibilities based on responses from the surveys. Kris Hammerstrand asked the team to gather information on ERMS and the team agreed to assist.

Cataloging Team: Tony Glass – The forum went well. They have not met since the forum, so they do not have the information from the evaluations yet. Their next meeting is on Monday, December 4.

Resource Sharing Team: Jennifer Hansen-Peterson – They had their last meeting on Wednesday, October 18. The Products and Services Vetting Committee asked the team to look at Odyssey. The team posted a questionnaire on the ILL listserv. The team is investigating the pros and cons of using the Odyssey product for interlibrary loan services. They are soliciting information from academic libraries that are using Odyssey via ILLiad or using the stand-alone version of
Odyssey. They are seeking information from the community for the following:
- What is the maintenance and support of the standalone Odyssey?
- What level of support to expect from CARLI?
- Make Odyssey a consortium requirement?
- Problems and benefits of Odyssey as a requirement?
- What are the differences between Odyssey and Ariel?
- Implications of using Ariel and Odyssey?
- Statistics?

There is the possibility that CARLI will replace Ariel with Odyssey. Some questions were raised about costs and Jennifer did not have any specifics. The team is to report back to Products and Services Vetting Committee in early December. The team continues to work on revising documents. The team

had no objections to not pursuing OCLC WorldCat delivery. The team is planning on a forum at Kankakee Community College on Wednesday, February 14. Their next meeting is Tuesday, November 14.

Instruction Team: David Bell – Their last meeting was a conference call and it was held on Tuesday, November 7. The tutorial scripts are completed, and they are working on completing the Camtasia videos. The deadline for the videos is December 1. Their next meeting is Monday, December 11.

OPAC Team: Tom Goetz – They had a conference call on November 1. The time-out period has been doubled. The team is exploring spell-check options. Tom is testing the new books searching page to see if it includes books that it should leave out or leaves out books that it should include. So far, Tom has not seen any problems. They don't have a roll-out date, as they still have back end issues to address, such as the interval of reports of new items, the time parameter for a new item (A couple of weeks? 1 month?), etc. Implementing RSS feed is a possibility. The team has been editing the Edit Search (used to be History), but the changes are not in production yet. The display of statuses has been fixed. The discussion turned to the future of the OPAC and how all of the teams in IUG have a stake in its future. Paige talked about a presentation from University of Rochester on their development of an Endecca-like product. Felix asked everyone to be thinking about the future of the catalog and its impact on the teams. IUG entertained the idea of a cross-team forum to discuss issues. We will revisit this topic in the beginning of 2007.

4. CARLI Office report: Paige Weston – CARLI is in the process of planning for the addition of the new libraries in I-Share. They are still working on moving content from the legacy sites to the CARLI web site. The CARLI site is still content lean and you still have to check both the legacy and CARLI sites. Paige asked us to make a note of where we looked if we if we cannot find something. This will help CARLI in determining where to locate links to content. CARLI held its second annual Membership meeting last Friday. CARLI is also preparing for new SFX users. Some of the new users are not part of I-Share, so CARLI is learning how to work in a non-I-Share environment in implementing a system.

CARLI noticed a problem with requests in the Universal Catalog and documented it in the document: "Universal Borrowing: Changes in Functionality in Voyager 6.1 < http://www.carli.illinois.edu/I-Share/docs/UBintheUC.pdf>. After the implementation of 6.1, CARLI noticed that Endeavor makes a more strict distinction between call slip and Universal Borrowing requests. A call slip is a transaction in which the patron, the item, and the pick-up location are all associated with the same institution. In a Universal Borrowing (UB) transaction the item and/or the pick-up location is different from the patron's affiliation. UB transactions begin in the Universal Catalog whereas call slip transactions begin in the local catalog.

Practically speaking, when a patron from library A tries to place a request for a local book (from library A) in the Universal Catalog, the patron is not given the choice to select his/her home institution (library A) as a pick-up location. (This is called the AAA requesting scenario.) Instead of defaulting the pick-up library to the patron's home institution (library A) like it used to in previous versions of Voyager, UC asks the patron to "Please Select Library" from the dropdown list. The patron can pick any one of the other 64 libraries, but not his/her home institution. This means that UC will only support AAB, with the pick-up location being library B, when the patron and the book's institution is the same place (library A). Since it is difficult for us to explain this to the user, Paige and her colleagues have been working on inserting coding

so that the home institution is listed in the dropdown list. It still does not allow you to select the home institution as a pick-up location, but when the user tries a new pop-up window will allow the user to repeat the search in the patron's local catalog. The patron will still need to re-initiate the request and re-enter barcode number in the local catalog. But, it will at least take the patron to the record in the local catalog. If their home institution does not support call slips for local materials, the text in the box will instruct the patron on what to do or bring up possibilities for books on the same topic, author, etc. This workaround is not live in production, but the text of the pop-up boxes will be reviewed by the Resource Sharing and OPAC teams.

The CARLI Office has implemented the new title indexes. The office will also evaluate the problem tracking system to make sure that it is working for both office staff and member libraries. Jennifer asked if it sends reminders. Paige answered in the negative, but staff will go through the list of outstanding requests and sort by date. Paige explained that if you got a number, your request is in the queue. It was suggested that a note indicating that the CARLI Office is working on a question, but no answer yet would be useful. Jennifer also asked if the workaround to check out materials to new member libraries would be used this time. The CARLI Office reviewed the number of transactions last time and they decided it was not worth it. Jennifer expressed concern, because Augustana and Western have 3 new I-Share libraries in their geographic area. Paige said that CARLI could revisit this decision. Jennifer also suggested that they can do local workarounds for Carl Sandburg College and other libraries in the area. Larissa asked how changes in the enhancement process at Endeavor will affect our ability to make changes to the OPAC and the rest of the Voyager system. Paige questioned whether the prior system was really used by Endeavor to prioritize enhancements. Wisconsin is not using UB, but is using Open WorldCat instead. It was asked if CARLI had thought about having users initiate their searches in WebVoyage and then taking them to WorldCat seamlessly; or having users go through WorldCat and if copies are available in the consortium, it will take them to WebVoyage. Paige indicated that the office had entertained these ideas, but nothing beyond that. Carlos talked about how his library is creating multiple portal points (local catalog, UC, WorldCat, Illiad).

5. CARLI Board: No report.
6. Final draft of thank you letters: T.J. Urbaniski – Cathy has finalized the letters and T.J. will send them out to us. We will finalize the last few touches online. At every meeting, we can mention names for recognition in the "Other Business" section. The CARLI staff will prepare the letters and give them to the IUG chair to send on behalf of the group.
7. Draft call for mentor libraries: Larissa Moebs – IUG reviewed her draft letter to elicit interest in being a mentor. There was a long discussion on how we should proceed with this initiative. While some argued that structure is necessary in order for mentor relationships to work, others were concerned that we were forcing libraries into a relationship, when new libraries can forge informal mentoring on their own. Plus, new libraries can get information on workflow by posing questions to one of the IUG listservs and get a variety of feedback. After extensive discussion of the options, IUG decided that registrants can check a box on the registration form to indicate if they would like a mentor at a meeting or forum or if they are interested in being a mentor to another librarian. The mentee can be a librarian or staff member from a new I-Share library or a librarian or staff member in a new position at an I-Share library. At the meeting or forum, mentees and mentors will have color-coded badges. Since Acquisitions & Serials have already advertised their registration forum, Carlos will talk to the team about making an announcement at the forum. We will test the check box options for the Resource Sharing forum in February 2007. We will also revise the evaluation form so that we can get feedback from mentees on the usefulness of the mentor

match-up.

8. Susan Singleton and Margaret Chambers' visit:

   a. Products and Services Vetting Committee: Susan began the discussion talking about this new CARLI Board committee. Susan explained that when she started here she was concerned whether all ideas were getting a good hearing. It seemed that the only way a new product or service would get a chance is if someone knew a Board member to serve as an advocate. This committee would be a more egalitarian way to elicit ideas from the community, both from CARLI groups and individuals. The board constituted a committee of directors, 3 Board members and 3 non-members, to serve as review committee. Ideas would come to the group through a web form. The Board specifically picked directors, who are used to making these kinds of decisions. The committee has a meeting every 2 months. Their decisions fall into one of four categories: yes, decline, not yet considered, or need more information. The CARLI Board has the final decision, but so far, the board generally follows the recommendations of the PSVC. A question was raised about who determines affordability. It depends, but in some cases, the pricing can be so outrageous that the PSVC declines because they do not want to support the pricing model. The PSVC is in the process of putting together a public site to list all of the proposals to date and organize them by the committee's decision (e.g., Yes). An announcement will come out sometime after the next Board meeting (November 17).

   b. Communication: Susan noted that no consortium communicates enough. Right now, they have decided to inundate us with information to determine the saturation point. Margaret is in the process of developing a newsletter. It will probably come out every 2 weeks. It will provide brief reports on what is going on in CARLI and provide links to more information. Margaret is also interested in getting brief quarterly reports from the chairs. Margaret will eventually move on to national and statewide PR, but right now, she is focusing on internal communication. Margaret is always willing to receive content from the groups.

   c. Some CARLI initiatives: Susan Singleton – she talked about the Digital Collections User Group and the Digital Visioning Task Force. As she and the rest of the CARLI staff see new innovations at conferences and meetings, they are taking back these ideas to the consortium. Carlos raised our concerns about communicating with non-I-Share libraries and possibilities for cross-pollination. Carlos also asked if there was any progress in facilitating virtual meeting and training. Susan is interested in partnering with the State Library on its web-junction program. Susan also mentioned the online training site, LibraryU.

9. Other Business:

   a. Recognition for service to CARLI: Paige proposed a name of someone who has done extensive work on the changes to the I-Share/UC. Tony will compile a list of names from the Cataloging forum.

   b. The next meeting will be on December 8. It will be a conference call only.

   c. We decided to hold our March meeting at Bradley.

Respectively submitted by
Stephanie Atkins