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I-Share Users' Group Minutes for February 9, 2007

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IUG Meeting Minutes

February 9, 2007, 10:00-12:00

Conference Call: 217-244-7526

Present on phone: Judy Anderson (SVC), Stephanie Atkins (UIU), David Bell (EIU), Xiaotian Chen (BRA), Felix Chu (WIU), Lorna Engels (CARLI), Tony Glass (ERK), Tom Goetz (WHR), Carlos Melian (NEI), Jennifer Hansen-Peterson (AUG), Larissa Moebs (ICC), TJ Urbanski (ISU), Paige Weston (CARLI).

Absent: Stephanie Graves (SIC), Kris Hammerstrand (CARLI), Cathy Salika (CARLI)

1. Announcements: Our next meeting will be March 9, 2007 at Bradley University in Peoria. Xiaotian Chen will send directions.
2. Approval of minutes for January 12, 2007 meeting: Approved.
3. Committee/Task Force Reports:

Acquisitions & Serials Team: Carlos Melian – The team met on February 2nd and continued the ERM (Electronic resource management) discussion. UIUC purchased Verde, the ExLibris product. Forum planning continues for the March 20 Cataloging forum. They are helping locate volunteers for the Acquisition and Cataloging workflow portion of the forum. All of the Acquisitions & Serials documentation has been “CARLized”. They are still working on documentation for complex publication patterns. The team explored using a wiki for communication. The consensus was against using it for routine communication, but there may be applications for specific group projects. They recommended IUG take a look at wikis. The next open conference call will be March 16th directly following their meeting, so team members can attend.

Cataloging and Authority Control Team: Tony Glass – Met Jan 30th. They are finalizing details for the March 20th forum “New cataloging standards and our shared future” at Columbia College, downtown Chicago. Presentations from Marjorie Bloss on Resource Description and Access (RDA), and Functional requirements for bibliographic records (FRBR), Jana Brubaker on advanced cataloging searches in Voyager 6.1, Chew Chiat Naun and Conrad Winke will present on Table of Contents notes fields, Breakout sessions will follow after lunch on effective workflows, especially with electronic resources, and a concurrent session will be given on authority control basics. The team is sending a letter to Elizabeth Clarage of the Collections Working Group, regarding the last copy issue. The team opposes putting a note in the catalog record as the last copy information is constantly changing.

Resource Sharing Team: Jenny Hansen-Peterson – Met Jan. 18th. Finalized plans for forum on Feb. 14th in Kankakee. Agenda is on the website. They currently have 89 registrations, 22 are call-ins. 15 participants would like mentors and 15 have volunteered to serve as mentors. Stephanie Atkins and Larissa Moebs of IUG are going to be two of the mentors for this group. Jenny Hansen-Peterson is going to introduce the mentor program at the beginning of the forum. Margaret Chambers plans to attend and videotape at the forum.

Instruction Team: David Bell – Met Jan.26th. Tutorials continue to be their main focus. They hope to finish them by the end of February. They are in need of a new member for a two year appointment.. There were three volunteers in the database. After discussion, Victoria West-Pawl of National Louis University was selected for Felix to invite to join the team.

OPAC Team: – Indexing recommendation - Tom Goetz – The team is still discussing a number of new search types. They really feel the need for some usability testing before recommending implementation of

any of them. A long discussion followed regarding usability testing. The consensus seems to suggest a need for a standing body of some sort that might:

- keep how-to/best practice documentation current
- maintain a "roster" of individuals interested in performing usability tests at their own institutions
- maintain a database of "design questions that need to be answered"
- critique usability test design to assure that it will be testing the things that need testing (the aspects of the computer interface) rather than other things (library policies, library collections, the users themselves...)
- collect (and distribute/forward as appropriate) the findings from usability tests conducted on common interfaces
- recommend appropriate scope of testing (local or consortial) for specific information needs from interface developers

IUG should review the materials gathered by the former IUAG WebVoyage Usability Study Task Force (USTF) and come prepared to discuss further at the next IUG in-person meeting.

Documents are available at http://office.ilcso.illinois.edu/Minutes/iuagwvustf/wvustf_home.html. See in particular their meta-report on usability testing *process*:

http://office.ilcso.illinois.edu/Reports/iuagwvustf/wvustf_final_process.pdf and also the collection of background materials at http://office.ilcso.illinois.edu/Reports/iuagwvustf/wvustf_docs.html

4. CARLI Office Report Paige Weston – New library implementation is in full swing. They are at the planning for data migration stage. Several CARLI staff are onsite at Trinity International today. Trinity is currently a Voyage library. Paige met with UIUC regarding accessibility concerns for visually impaired. She will try to schedule a meeting with ExLibris developers and the accessibility group. The accessibility group is very knowledgeable about web design and accessibility solutions. The RFP for the delivery study is still in process. Analyzer is still having installation problems.

There were several questions for Paige from the group. Regarding the link resolver button in WebVoyage, the Texas A&M code has not yet been implemented, but is doable and will happen. The new books tab for local catalogs will be discussed at next week's staff meeting. The reports server downtime issues were connected to the performance issues. The reports server access should become stable again as the performance issues are resolved. The CARLI staff is investigating the Voyager 6.2 and 7.0 upgrades. 6.2 does not address many of our issues. They continue to investigate the options. Performance issues are a result of a change in servers. Oracle 9i should have allowed us to merge our data in to one instance of Oracle. Voyager does not take advantage of this feature as anticipated. CARLI is in the process of moving each library to its own instance of Oracle. This will also make a system restore for an individual library quicker and easier. Regarding the future of Voyager, the staff is looking forward to the announcements at the End User Conference in April.

5. CARLI Board Report: Kris Hammerstrand was attending the summit meeting on the future of OPACs at University of Rochester.
6. Other Business

Openings on Instruction Teams: filled.

Recognition for service to CARLI: Felix has sent the letters from last time. New names: Cindy Fuller for forum work, Nancy Bohm for extraordinary service on the OPAC Team, Resource forum presenters.

Library to library mentoring letter: Approved as revised. Felix will send to liaisons and copy the directors. The letter will be sent as the body of an email, not as an attachment. It will be from the Chair on behalf of the group.

Felix shared his mid-year report on the Users Group. He intends to update the information monthly so

year end report will be easy to submit.

7. Future Agenda Items:

OPAC Team recommendation on adding holdings keyword search to all instances of Web Voyage
Usability testing discussion