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I-Share Users' Group Minutes for May 11, 2007

Consortium of Academic and Research Libraries in Illinois

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IUG Meeting Minutes

May 11, 2007, 10:00-12:00

Conference Call: 217-244-7526

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

1. Announcements: Tony Glass is the new director of Eureka College. Our next meeting was moved to Wednesday, June 13, 2007 in the CARLI Office conference room, in Champaign.
2. [Approval of minutes for April 13, 2007 meeting: Approved.](#)
3. Committee/Task Force Reports
 - Acquisitions & Serials Team: Carlos Melian – The team met on April 20 to discuss complex publication patterns. The team is working on documentation with screen shots of patterns and a draft email soliciting examples was sent to the team. They hope to finalize the document at their next meeting (May 18).
 - Cataloging and Authority Control Team: Tony Glass – Tony was unable to attend the last meeting, so spoke from the meeting notes. The team discussed the upcoming vacancies. Casey gave a report on the EndUser conference. They have scheduled a conference call for June 7 to brainstorm ideas for future projects.
 - Resource Sharing Team: Jenny Hansen-Peterson – The team does not have the summary of mentors and mentees' comments from the evaluations. Lorna also looked through and most of the comments were positive. Some mentors and mentees commented that they wanted more time to chat. It may be easier for mentors and mentees to connect now that forums will provide a lunch. Mel Farrell's presentation at the forum met the need identified at the March IUG meeting for information about Voyager bugs and workarounds. The team's next meeting is Monday, May 21.
 - Instruction Team: David Bell – David sent a draft of the survey to IUG for comment. Information about the newly revised tutorials was distributed on CARLI's Announce listserv. Tom Goetz observed that students at Harper College like the tutorials. Beth Woodard (UIUC) has agreed to be a speaker at the November 7, 2007 forum at Heartland Community College.
 - OPAC Team: Tom Goetz – The team has a draft proposal on the Spell checker. Libraries can now configure their local catalogs as a SFX source. The team has one retirement and several openings.
4. CARLI Office Report: Paige Weston
 - The CARLI User Support staff attended the EndUser conference.
 - The CARLI office has a new site search which is faster and will retrieve PDFs and other attachments.
 - The after-hours support will soon be configured so that the CARLI staff are paged, not the AITS Help Desk. • The focus groups have started meeting, but no results are ready. The CARLI staff have participated in a separate round. The focus groups are a follow-up to the CARLI survey and attempt to address how CARLI can serve member libraries better and more efficiently. The results will be used to develop the CARLI strategic plan.
 - The implementation of the new I-Share Libraries is going well, even though there was a minor

setback in training. The data loads are going well. The new libraries will go live in the catalog on June 5 and will have everything except UB by July 1.

- CARLI met with Ex Libris to discuss accessibility in the public catalog. This is the initial discussion that will lead to more details.
- 18 libraries are using the new title list.
- The implementation of Voyager Analyzer has been delayed for contractual reasons. Once these issues are ironed out, there are still lots to be done with setup, training, etc. CARLI will continue to provide training in Access reports. A Reports Forum will be organized for the fall to discuss what works best (Analyzer or Access) for certain situations. IUG will work on a forum this summer.

5. CARLI Board Report: Kris was not in attendance, so we did not get a report.

6. Other Business

- IUG's June 15 meeting is in conflict with the Public Services Forum. The IUG meeting was moved to Wednesday, June 13. IUG team chairs will be invited to the June 13 meeting.
- Felix will have a draft of the IUG annual report on June 13. He will take our suggestions and send it to the CARLI Board by the June 30 deadline.
- IUG reviewed the Instruction survey and had no comments. The survey will be sent via Survey Monkey on Tuesday, May 15.
- Forum Evaluation Form: Carlos wondered how useful some of the questions are on the evaluation form and what kind of information are we getting out of it. He suggested paring down the survey to questions about primary duties, topics for future forums, and general comments. Others suggested that since we started the new mentor program at forums, we should keep the mentor questions. It was also recommended to allow space for the team to ask specific questions. These questions do not need IUG's approval. Carlos agreed to draft an evaluation form and bring it to the next meeting.
- Usability study proposal: Paige shared her thoughts about the proposal. We should avoid using "task group" to describe this team, as our recommendation to the CARLI Board is to make this a permanent standing committee. Plus, we are gearing the committee to examine I-Share services and products, but our vision is for this committee to serve as a model for future usability testing of all CARLI products and services (e.g., SFX). Paige had other suggestions and she agreed to send them to the IUG discussion list.
- Recognition of service: There was some discussion whether we send letters to everyone who is cycling off the teams. Paige asked whether we have a specific letter template for serving on a team. Cathy said we do. Jenny will send the names of the presenters at the Resource Sharing Forum. We also discussed sending a letter to Judy for her service on IUG.
- The new books button is available. If a library is interested in it, they need to send a note to support@carli.illinois.edu.
- Primo: We briefly talked Primo, WorldCat local, and the open source product under development at University of Rochester. There is some concern that CARLI's long RFP process is making it difficult for consortial libraries to keep up with changing technologies.
- EndUser conference: Ex Libris is committed to supporting both Voyager and Aleph for "many, many years." Ex Libris specifically mentioned continuing Voyager through versions 7 and 8 (2009). Paige and Cathy mentioned that there are 37 North American developers for SFX and Voyager and the developers split into 2 teams. One team of 5 members focuses on Voyager fixes, whereas the other team looks at new developments in the products. Ex Libris talked about enhancements and minor bug fixes, but there was nothing much new for Universal Borrowing

(UB). Those who attended the conference got the impression that Ex Libris was not going to put much effort into fixing UB. Even though UB is only used by 4 consortia, Jenny and others pointed out that Ex Libris needs to look at how many libraries are in the consortia to truly assess UB's impact. The Ex Libris CEO talked about finding the right balance between improving user experiences and staff experiences. ILS vendors are finding it difficult to serve both constituencies equally, so they are forced to make trade-offs. Ex Libris intends to do a major facelift to WebVoyage so that it looks more like what we want and it will require less effort to customize. Ex Libris plans to release quarterly bug fix patches.

Future Agenda Items:

- June:
 - o Meet with team chairs
 - o Finalize IUG and team appointments
 - o Review revised forum evaluations
 - o Primo and other search/discovery tools