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I-Share Acquisitions and Serials Team Minutes for May 18, 2007

Consortium of Academic and Research Libraries in Illinois

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I-Share Acquisitions Serials Team Minutes

May 18, 2007

In attendance: Tammy Schnell, LLC (presiding); JoAnn Hounshell, IIT Kent; Anne Hudson, CARLI; Jen Masciadrelli, CARLI; Carlos Melian, NEI (IUG Board Liaison); Ete Olson, NIU; Ted Schwitzner, ISU (recording); Todd Spires, BRA; Rachel Wightman, NPU.

Not present: Cindy Fuller, MIL; Wendy Shelburne, UIU.

The meeting was held in the CARLI conference room and via conference call beginning at 11:00 a.m.

1. [Approval of April Minutes](#)

Minutes had been reviewed and corrections submitted via email. The minutes were approved as corrected.

2. IUG Report

Carlos reported on activities of IUG and the other teams. ICAT is beginning to look at future projects. Resource Sharing provided time for the new I-Share mentor-mentee relationships at its recent forum. The main concern expressed was that people wanted more time. Instruction is about to post a survey on instruction needs, the results for which will be built into program content for a November forum. OPAC has a draft for a spellchecker for the WebVoyage search box, and the use of WebVoyage as an SFX source has been released. An annual report from each team is due June 15, and team chairs are invited to the June 13 IUG meeting.

Also, CARLI has made available a paging option for after hours support, and a phone menu is being developed. Focus groups have been formed and met to explore future directions for CARLI, and a round of focus groups for directors is planned for June. Analyzer has been delayed due to licensing issues. A usability study proposal is due to go out soon; the study appears to be interested in both checking new functionality and incorporating assessment, though what is to be assessed is unclear. A reports forum is being discussed for Fall 2007.

3. CARLI Report

Jen reported on the latest doings at CARLI. All of the consultants attended the EndUser conference and picked up some new ideas.

Some team members' terms will be expiring at the end of June, and the Board has been receiving volunteers for each team via a form on the CARLI web site. Jen did not know how many volunteers had specified interest in IACQ, but she said she would check. Those with expiring terms are Cindy Fuller and Rachel Wightman. Additionally, Ann Riley's resignation from the Team went into effect following the April IACQ meeting. Tammy reported that she received a resignation notice from Wendy Shelburne, effective with this meeting. Thus IACQ will require four appointments to fill openings.

CARLI continues to actively work on the timeout issue for clients throughout the consortium. Tammy reported seeing timeout issues in WebVoyage as well, noting that the countdown timer would freeze at "2:01".

Thirteen (13) libraries have customized the new titles list, and lots of feedback and suggestions for improvements are coming in on this feature.

4. Complex Publication Patterns Permission Update

The team reviewed the draft letter prepared by Cindy Fuller that requests a library's permission to let CARLI do screen shots of complex publication patterns in use. The team requested that a form be placed

on the Acquisitions & Serials page of the CARLI web site. Libraries could use the form to submit information they are willing to share in response to the letter being sent as a prompt. Jen will ask Ed Schell about getting a form ready.

5. ERMS Demo Ideas/Scenarios

The team started out by identifying a number of problem-solving scenarios that could show off an ERMS' features. These included:

- Tracking information on a current title
- Adding a new title
- Cancelling a title
- Trials
- Handling journal packages and/or databases
- Handling consortial purchases
- Integration with link resolvers
- Integration with acquisitions portion of integrated library system
- Tracking changes in licenses
- Tracking permanent access
- Tracking workflow
- Integration/communication with vendor (e.g., EBSCO, Swets) systems
- Handling/tracking paper subscriptions/continuations⁶. Topic for Quarterly Open Conference Call

A suggestion was made to focus on end-of-year/beginning-of-year topics, given that the call is in June. The team agreed that looking at end-of-year reports, such as lists for bibliographers and end-of-year fund information, would make an appealing topic. Carlos commented that he would have a number of speaking points. Jen will draft an announcement for the call.

Essentially, each demonstration should show how the system allows a library to track and maintain information that cannot be effectively stored and retrieved in other systems.

In order to avoid the logistical problem of coordinating multiple ERMS vendors to a single day workshop, and also to prevent the appearance that the demos marked the beginning of a selection and purchase process, the team decided that the best approach would be to coordinate customized webinars, one vendor per day. The webinar could target all levels of library staff, and be presented as a way to get information out on the tools available, without making any commitments. Webinars should focus on life cycles of electronic titles, packages, and aggregators. Additionally, the team wants each vendor to address whether its product might offer shared efficiencies for a consortial environment, such as reducing duplication of effort or help for small libraries.

6. Topic for Quarterly Open Conference Call

A suggestion was made to focus on end-of-year/beginning-of-year topics, given that the call is in June. The team agreed that looking at end-of-year reports, such as lists for bibliographers and end-of-year fund information, would make an appealing topic. Carlos commented that he would have a number of speaking points. Jen will draft an announcement for the call.

7. Other

Ted asked what the goals for next year might be looking like at this point. Some of the suggestions included doing more with acquisitions reporting, tracking current subscriptions, combining subscriptions with a focus on the ledger, doing WROs for acquisitions and defining what you want from the WRO, and developing content for an Acquisitions forum, possibly centered around reports.

The meeting adjourned at 2:00.

Next Meeting: Thursday, June 14, 11:00-2:00, followed at 2:00-3:00 by the Open Conference Call.

Respectfully submitted

Ted Schwitzner