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I-Share Users' Group Annual Report Fiscal Year 2008

Consortium of Academic and Research Libraries in Illinois

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I-Share Users Group Annual Report June 2008

Chair's Note

This has been an exciting year for IUG. We have been very intently working on adapting to our new position within the growing CARLI community and have been focusing on coordinating our efforts among the I-Share teams and between the I-Share teams and the other CARLI working groups. As our In Process section will show, we have some in-depth collaborative initiatives in the works for the coming year as a result of the groundwork laid this year.

Membership and meetings

IUG has met regularly this past year. In July, the term limits, officers, and work-group liaisons were established. Members and terms (as of July 2007) were:

- 1 year: Dallas Long (St. U), Paula Garrett (IMSA), David Bell (St. U), Tom Goetz (CC)
- 2 year: Larissa Moebs (CC), Carlos Melian (St. U), Xiaotian Chen (Pr.), Stephanie Graves (St. U)
- 3 year: Keith Eiten (Pr), Sarah McHone-Chase (St. U), Carol Reid (CC), Stephen Smith (St. U)

(CC= community college; Pr = private; St. U = State University; and IMSA = Illinois Math and Science Academy)

The officers for the year were:

Chair: Larissa Moebs
Vice-Chair/Chair Elect: Carlos Melian
Secretary: Carol Reid

And the I-Share Team Liaisons were:

Acquisitions and Serials Team (IACQ): Carlos Melian (continued from prior year)
Cataloging and Authority Control Team (I-CAT): Stephen Smith
Resource Sharing Team: Sarah McHone-Chase
Instruction Team: Stephanie Graves
OPAC Team: Tom Goetz (continued from prior year)

And the CARLI Liaison(s) were Paige Weston and Lorna Engels with frequent attendance by Cathy Salika

While we did not have any resignations during the course of the year, we did have one maternity leave in April that necessitated a substitution appointment for the Instruction Team Liaison. Keith Eiten volunteered to be Liaison to that team for April through June.

We expanded our scheduled meeting format to include conference calls more frequently than just the "bad weather months" of December through March and, unlike prior years, did not meet in

months where we felt that it would not be necessary or beneficial. We attempted to continue the goal of one meeting per semester at a location other than the CARLI offices, but scheduling constraints limited us to only one. We met for the June 2008 meeting at Wheaton College. We held 5 other monthly meetings at the CARLI offices and 4 meetings via conference call. We opted to abstain from meetings during the months of December 2007 and May 2008 due to unusual time constraints when scheduling the other meetings for the year.

We changed the format and process for recording our minutes. In keeping with Board practices, we began using the online minutes template in October 2007. Then we chose to approve and update minutes via e-mail beginning in January 2008.

The Nominating Committee for IUG and associated Teams openings for 2008-2009 year consisted of Carlos Melian, Sarah McHone-Chase, Xiaotian Chen, and Lorna Engels.

Accomplishments

I-Share Acquisitions and Serials Team (IACQ):

- * Assisted with Electronic Resource Management System (ERMS) webinars and continued with a successful submission to Product and Services Vetting Committee for consortial investment in this technology.
- * Offered quarterly open conference calls in September, March and June with the topics of "Continuations and Encumbrances," "Worst Practices" and "Credits, Credit Cards and Audit Trail Concerns"
- * Utilized both private and public aspects of CARLI wiki to make notes from forums, open conference calls and webinars readily available
- * Launched shared complex publication pattern resource page with a form for member libraries to submit and share screen shots of their complex publication patterns
- * Presented a Fall forum

I-Share Cataloging and Authority Control Team (ICAT):

- * Edited Voyager tag tables to bring them into compliance with changes to the MARC formats and standards issued in OCLC Technical Bulletin 254
- * Reviewed and approved revised Suppress/Replace Routine which then reduced the 24 hour waiting period between suppress and replace actions to one hour
- * Provided feedback to DCUG metadata standards subcommittee
- * Recommended consideration of Google API for including content from Google Books in Voyager catalog records to I-Share OPAC Team
- * Hosted a Fall and Spring forum

I-Share Instruction Team:

- * Updated I-Share end-user Camtasia Tutorials
- * Seeded the CARLI Wiki I-Share page with resources created by member institutions relating to instruction
- * Hosted a Fall and Spring forum

I-Share OPAC Team:

- * Served in advisory capacity on VUFind project
- * Offered integral assistance to creation of I-Share Libraries Map in OPAC footer which utilizes Google Maps API
- * Approved addition of persistent link to each single-record view page for the UC and for all local OPACs
- * Participant in accessibility meetings with ExLibris regarding WebVoyage for Voyager 7.0

I-Share Resource Sharing Team:

- * Posted Billing and Policies wiki
- * Started discussion on standardizing UB policies; recommended UB groups remain and standardized each group's policies
- * Revised I-Share Best Practices for Monograph ILL document for new ILDS
- * Three of team participated in I-Share Resource Sharing Policy Task Force
- * Hosted a Fall and Spring forum

I-Share Users Group (IUG):

- * One of our first activities was to evaluate, discuss and re-configure the CARLI Forum Feedback form. The form was collecting needless information in lieu of meaningful, desired data. The new form has been in use at all forums since July 2007.
- * Our next contribution was the Forum Friends initiative. After significant discussion and planning, IUG, with the support of the CARLI office, sponsored a mentor-for-a-day program at any forum. Participation by both mentors and mentees was voluntary and had the goal of assisting people new to the I-Share community with their transition into it as well as providing some measure of networking opportunity for the new member. The first run of this program happened at the November 7th Instruction Forum. It was well received and participants had several suggestions to help improve it. After some changes, the Forum Friends program has been working well and has been nearly unanimously well-received by the participants in the many forums that the I-Share teams have held over the past year.
- * Another IUG initiative was to push all of the Teams into using some means to share their Forums with more I-Share libraries who were unable to send librarians in person. This met with some success in the form of guest bloggers at some of the Forums, notably I-CAT's November 2007 Forum where it was initiated, and in the form of I-ACQ's Complex Publication Pattern website that shares screenshot examples.
- * At the behest of our "Small Libraries" we requested CARLI to create a listserv for a "Small Libraries Interest Group." While there is a fair membership on that listserv, there is little to no activity in the form of discussions.

Forums:

All forums report being well-received and successful at meeting their stated focus. Several of the forums initiated further conversations and future forum plans.

I-Share Instruction Team:

11/7/07 – Heartland Community College – forum focused on best practices in end-user instruction. Worked with Forum Friends

I-Share Resource Sharing Team:

11/11/07 – Northern Illinois University – focus on Copyright issues, especially as they pertain to Interlibrary Loan and Reserves. Further initiatives included Forum Friends and Team Member Bloggers

4/14/08 – University of Illinois, Springfield – focus on statistics and reports; team members blogged forum

I-Share Cataloging and Authority Control Team (ICAT):

11/13/07 – University of Illinois, Springfield - Cataloging Matters: Looking Forward – forum on Next Generation catalog initiatives within CARLI. ICAT offered the Forum Friends and had a Guest Blogger for this forum.

4/9/08 – Kankakee Community College – The Future is Now, But What Will It Look Like? – focus on LC Working Group final report on series authority control and Resource Description and Access (RDA). Continued Forum Friends initiative.

I-Share Acquisitions/Serials Team (IACQ):

11/29/07 – Illinois State University - Clean Up Your Acq – forum on maintenance of the Acquisitions client

I-Share Users Group (IUG):

3/18/08 – Illinois Wesleyan University - I-Share Liaisons Forum for the official Liaisons from the I-Share schools to the CARLI consortium. We focused the day on the Liaison as the primary communication conduit between their school and CARLI. To that end, we included a “refresher” of the Primary Responsibilities and Functions of a Liaison and the tools and support that I-Share offers for that role, a look at proper filing of Work Requests, and a brief look at the functional areas of Voyager.

In Process

I-Share Acquisitions and Serials Team (IACQ):

- Collaboration with ICAT for a joint forum on workflow analysis and assessment featuring nationally known workflow experts

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I-Share Instruction Team:

- Interested in the assessing the success of the tutorial revisions and determining the use of the tutorials by librarians as well as all I-Share users
- Investigating the possibilities for improving the tutorials, planning to revisit this issue routinely, and exploring the potential for similar tutorials in CARLI's implementation of VuFind
- Future Forum - partner with the Public Services Working Group to host a joint forum on the use of social technologies in instruction.

I-Share Users Group (IUG):

- Collaboration with Public Services Working Group on a proposal for an in-depth program for Copyright, as one of the key comments to come out of the Resource Sharing fall forum was more information on copyright and libraries.
- Creation of an Ad Hoc Task Force on Statistics to “develop documentation and resources to assist libraries with compiling annual statistics for all types of library materials...”
- Response to the significant anecdotal interest expressed in both Reporting from the Voyager environment and a return of the Reports Forum, as well as a means to set up a more sustainable or focused model for dealing with reports and reporting within the I-Share community and the best means to accomplish that goal

I-Share OPAC Team:

- Completing a WebVoyage Upgrade Checklist to help libraries test their local OPAC during upgrade demo periods
- Investigating incorporation of Google Books API into the UC and local OPACs
- Developing improved and simplified guidelines for libraries to build canned OPAC searches

I-Share Resource Sharing Team:

- Resource Sharing Policy Task Force
- Revising UB Lost Procedures – Best Practices document

Discussions

Some of our primary discussions of note were as follows

- Purpose of IUG within the changing CARLI environment (with Susan Singleton)
- Webcasting workshops and forums to enable more libraries to “attend” from a distance
- Usability studies – recommended to develop a program for interested participants funded in part by CARLI through an application/award process. Remanded to CARLI staff at this point
- Needs (and definition) of “small” libraries in I-Share
- PR for teams and their activities – help the general I-Share membership understand what it is that the various teams do and why to get involved (with Margaret Chambers)
- Copyright, copyright and more copyright

- E-Journals and e-resources that colleges “own” that might not be cataloged in I-Share for resource sharing purposes, but can be listed in WorldCat
- Topics determined to be outside of I-Share’s purview, including continued training for SFX and Camtasia studio

Primary discussions of the I-Share Teams included:

- Workflow and the benefits of having a nationally known speaker (IACQ)
- Ramifications of move to RDA and FRBR (ICAT)
- LC Working Group final report on series authority control (ICAT)
- Statistics on use of the tutorials are not currently available from CARLI so the team shifted focus to explore alternatives to Camtasia as well as methods for marketing the tutorials to end-users (Instruction Team)
- Formed sub-team to explore the possibilities for speakers and topics for joint forum with PSUG (Instruction Team)
- All current and in process projects are focused on WebVoyage functionality, what ramifications will these OPAC enhancements have with new front-ends (OPAC Team)
- Will OPAC ask other teams to collaborate for Voyager 7.0 within that team’s area of interest (OPAC Team)
- Standardization of UB group policies (Resource Sharing Team)
- Problems with UB, especially re-setting Counters in Patron records (Resource Sharing Team)

Respectfully Submitted 13 June 2008,
Larissa Moebs
Chair, I-Share Users Group