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I-Share Users' Group Annual Report Fiscal Year 2009

Consortium of Academic and Research Libraries in Illinois

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I-Share Users' Group Annual Report 2008-2009

Membership

Mary Burkee (2009-2011, St.U), University of Illinois Urbana-Champaign
Xiaotian Chen (2006-2009, Pr), Bradley University
Sandy Craig (2009-2011, CC), Illinois Eastern Community Colleges
Keith Eiten (2007-2010, Pr), Wheaton College
Stephanie Graves (2006-2009, St.U), Southern Illinois University at Carbondale
Sarah McHone-Chase (2007-2010, St.U), Northern Illinois University, **Chair-Elect**
Carlos Melian (2006-2009, St.U), Northeastern Illinois University, **Chair**
Carol Reid (2007-2010, CC), Heartland Community College, **Secretary**
Alexis Rogers (2009-2010, CC), Lincoln Land Community College
Jason Rossi (2009-2011, Pr), Robert Morris University
Stephen Smith (2007-2010, St.U), University of Illinois at Springfield
Karen Whisler (2009-2011, St.U), Eastern Illinois University
(*CC = community college; Pr = private; and St.U = state university*)

CARLI Staff Liaison: Lorna Engels

The year's work for the I-Share Users' Group (IUG) was marked with numerous activities framed by the discussion and review of the IUG charge and the I-Share Teams' charges. The revised charges reflect a broad spectrum of issues related to our consortium and member libraries and the accomplishments for 2008-2009 further emphasize our current environment.

A specific discussion that IUG began to promote was related to the "future of the integrated library system (ILS)". As CARLI moves to a next generation ILS, IUG felt it was necessary to begin a discussion with the I-Share teams and the CARLI staff for further dissemination to member libraries. The year produced several opportunities to begin this process with the clear implication that we would continue to actively participate in any future developments that fall within the scope of IUG.

As detailed below, the needs of our members are not necessarily Voyager-specific but involve a wide array of issues related to workflows, best practices and instruction. IUG and the I-Share Teams continue to be committed to assisting libraries and providing information as needs are identified and our consortium evolves.

Review of Charges

The last meeting of the year for IUG is traditionally a joint meeting with the I-Share Team chairs to discuss the annual report, current projects and the coming year's activities. At the June 2008 meeting it became evident that IUG and its teams needed to re-examine their roles and contributions to CARLI and the member libraries. Many of the teams had moved beyond "the product" and were working with, and providing information for, many issues related to their functional areas that were not necessarily Voyager specific. IUG was also beginning to examine its charge in a post-Voyager implementation environment and wanted to reestablish its leadership role with the teams and with any future CARLI initiatives.

As a result of these concerns, IUG began discussions with Susan Singleton, Executive Director of CARLI, CARLI staff and each of the I-Share Teams in fall 2008. After meeting with each team to discuss specific issues and future directions, team charges were revised and submitted to IUG for approval. IUG finalized this process in late fall 2008. Concurrently, IUG also began to discuss its charge and responsibilities and presented a revised charge in November 2008, which was subsequently approved by the Board at their December 2008 meeting. Our hope is that the new charge reflects IUG's commitment to continuous engagement with the I-Share member libraries and CARLI's strategic direction.

Task Forces

A number of Task Forces were created during the year to address issues raised by IUG or requested from I-Share Teams for additional action.

- **Ad Hoc Task Force on Statistics and Reports**
To assist member libraries in their annual statistics reporting, IUG created an ad hoc task force to review and update the CARLI annual statistical package and document its content. The Task Force was also asked to link and document the statistical package in connection to several annual statistics that libraries are required to report (e.g., ACRL annual statistics). The group completed its work in early 2009 with an extensive document to assist CARLI libraries in their annual statistical reporting (<http://www.carli.illinois.edu/mem-prod/I-Share/i-sysdocs/I-network/statspck.html>).
- **Usability Testing Volunteer Group**
At the request of the I-Share OPAC Team, IUG created a Usability Testing Volunteer Group to assist the OPAC Team and CARLI staff in testing specific elements in WebVoyage and other CARLI supported systems. The charge was recently completed and a call for volunteers will go out this spring.
- **Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009)**
ICAT identified the need to review and update the extensive document related to cataloging electronic resources that was created by a previous IUAG task force in 2004 (http://www.carli.illinois.edu/mem-prod/I-Share/cat/archive/040419_cater_final.pdf). IUG agreed that there have been substantial changes in the electronic resources environment since that time and created a new task force to update existing documentation. While the charge of the Task Force is focused on cataloging and OPAC displays, it is expected that other issues related to electronic resources in the I-Share environment will surface that may need to be addressed by IUG in the near future.

Forums/Workshops

- **Liaisons' Forum**
The annual Liaisons' Forum was held in Champaign in May 2009. The Forum was designed to provide information to Voyager Liaisons on their responsibilities and further communication with CARLI staff and other libraries. This year's Forum also included an extensive formal discussion related to the "future of the ILS." IUG hopes that this initial conversation will formalize into more extensive feedback with member libraries as part of
- **IUG Reports Wimba Forum**
Another annual IUG sponsored forum related to report writing with Voyager. In attempting to address alternative forms of information delivery, IUG held the forum for smaller blocks of time on two separate days using Wimba. The format was extremely

successful and is an excellent option to minimize travel requirements for future educational events.

- **Copyright Basics and Library Reserves Workshop**
The all-day workshop was sponsored by both the I-Share Users Group and the CARLI Public Services Working Group with funding provided by the CARLI Program Planning Committee. The workshop was led by Thomas Lipinski, Co-Director and Associate Professor for the Center for Information Policy Research at the School of Information Studies at the University of Wisconsin and covered a broad range of copyright topics related to libraries, including course reserves.

Miscellaneous

- **Functional checklists for Voyager upgrade**
During the fall 2008, the OPAC Team created a testing “checklist” in anticipation of the upcoming Voyager upgrade. IUG felt that similar documentation would be of general benefit and requested that each functional team prepare a “checklist” for each Voyager client—Acquisitions, Cataloging, and Circulation. The checklists can be used as needed by member libraries, functional teams and CARLI staff for Voyager upgrades.
- **Communication channels**
While not a formal IUG initiative, communication strategies were a prominent note at the Chairs’ meeting during the CARLI annual meeting last fall. IUG considered the need for additional communication as another extension of the dialog we were having with the teams related to their charges. We have continued this practice during the year, specifically addressing issues identified by I-Share teams and directly involving them in IUG actions. The IUG Liaisons to each team continued to be extremely active in maintaining a high level of communication with IUG and its teams.
- **“Future of the ILS”**
IUG began an informal process of discussing the “future of the ILS” in preparation for any related CARLI initiatives. We have requested that each I-Share Team also begin informal conversations during the coming year to develop an ongoing dialog within I-Share libraries. IUG hopes to formalize information gathering in the near future to engage with member libraries and actively participate in critical decisions regarding the next generation ILS.

IUG Future Objectives

- Continue the “future of the ILS” discussion and formalize information gathering as CARLI’s future ILS direction develops.
- Develop communication processes with I-Share Teams, other CARLI groups, CARLI staff and member libraries. Continue to work closely with I-Share Teams to address critical needs. Review the work of the Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009) and identify additional areas for IUG action.
- Monitor the Usability Testing Volunteer Group and refine processes as needed.
- Identify additional areas related to the management of electronic resources and develop strategies for delivering related information to member libraries.

Summary of Team Activities

At the request of IUG each functional team reviewed and updated their charge. After discussions between the Teams and IUG, it was agreed that the work of each team is both system and function specific. The revised charges enable each team to be flexible in providing information and assistance to the member libraries, IUG and the CARLI staff in system processes and other

broader, related initiatives. IUG approved the revised charges for each of its teams during the fall 2008. Indicative of the revised charges, the list of accomplishments that follow refer to a broader range of work with systems and across functional areas (VuFind and technical services workflow analysis, for example).

Of particular importance is the continued extensive outreach to I-Share and CARLI libraries by all the teams in the form of forums, workshops, Wimba sessions, documentation, etc. to disseminate information and promote communication. Another notable development this year was the effort to work collaboratively with other CARLI groups. While this effort was initially adopted by the IACQ and ICAT teams in their combined request to the CARLI Program Planning Committee last spring for a Workflow Analysis Seminar in fall 2009, it was a consistent theme within IUG in response to conversations during the Chairs' meeting at the CARLI Annual Meeting. In addition to combining limited resources in providing a high level of service, the collaborative process and alternative delivery mechanisms reflects our current professional environment. Additional communication was a theme reported by several of the Teams in connection to the evaluations of their forums and it is clearly a need that requires continued vigilance. IUG will continue to promote these initiatives in addressing member library funding priorities related to travel and the need for continued engagement by libraries across the state.

Below are brief summaries of each Team's annual assessment of their specific activities and future initiatives.

I-Share Acquisitions & Serials Team (IACQ)

Sharon Nelson, Northern Illinois University, Chair

Accomplishments

- Sponsored the Technical Services Workflow Analysis Seminar in conjunction with the I-Share Cataloging & Authority Control Team (ICAT)).
The all-day forum on workflow assessment was presented by R2 Consulting on Sept. 10, 2008, in Champaign, IL, following nine months of work and planning on the part of both IACQ and ICAT. The forum was generously funded in full by the CARLI Program Planning Committee, allowing all participants to attend free of charge. Because the topic extended beyond Voyager and I-Share, attendance was opened up to all CARLI libraries. This forum was the keynote event for IACQ and provided a springboard for related programs on workflow redesign throughout the year. These included:
 - Follow-up open conference call to the Workflow Redesign Seminar (Oct. 10, 2008)
The conference call was open to all CARLI members, whether or not they had attended the seminar, and allowed participants to begin discussions about ideas they had heard at the seminar as well as to share planned and ongoing workflow redesign projects in their libraries.
 - Workflows "mini-forums" held throughout the state: (Chicago, February 3; Greenville, March 18; Bloomington, March 19).
Also jointly sponsored with the I-Share Cataloging & Authority Control Team (ICAT)), these sessions were intended to enable library staff to come together for an afternoon of focused conversations on this topic.
 - Participated in the ICAT Spring 2009 forum including a panel discussion on workflow redesign (which served as the capstone to the "workflows" theme for the year), and via a series of "table topics".
- Revised the IACQ Team Charge

At the request of IUG, IACQ revised its charge to enlarge its responsibilities beyond the charge's original, product-centered, focus. The revised charge now enables IACQ to share expertise and communicate issues, concerns, best practices, innovations, and emerging trends in acquisitions and serials librarianship in general to the CARLI membership and/or governing bodies, instead of only those issues most directly affecting I-Share and Voyager.

- Developed a new Acquisitions/Serials FAQ for the CARLI wiki
The FAQ was developed from reviewing comments made on last year's survey of I-Share libraries about their use of Voyager Acquisitions, and from the CARLI Office's database of support requests. From this information the team put together a list of frequently asked questions (and common misperceptions) about using Voyager Acquisitions and Serials in the I-Share environment. While this project was originally intended to be the basis of the December 2008 open conference call, the team decided the information collected would be more useful as a written resource. Soliciting updated topics for the Acq/Ser FAQ is now a permanent agenda item for each IACQ monthly meeting.
- Completed a Voyager 7 upgrade "script"/checklist for Acquisitions & Serials
At IUG's request, IACQ prepared a 10-page document describing current and post-upgrade expected Acquisitions and Serials functionality.

Future Objectives

Two projects on the team's initial goals for 2008-09 have been postponed until after the Voyager 7 upgrade. These are "Getting Started with EDI," and a review of Complex Publication Patterns. Both topics will be developed so they can be presented via Wimba and/or conference call.

The team has also decided to postpone the annual Acquisitions/Serials forum from its "traditional" fall slot until spring 2010. Since the team would have to commit to a fall forum by May 2009, postponing it will enable IACQ to address any issues arising from the June 2009 Voyager 7 upgrade, and to best align potential forum topics with member libraries' needs (with travel budgets being slashed throughout the state, the forum should be as informative, useful and compelling as possible to make attendance worthwhile). Another advantage in postponing the forum is that the several new members who will be joining IACQ in July 2009 can be involved in the forum planning process from start to finish, instead of being brought in "mid-stream."

In June 2009, Anne Hudson of the CARLI Office will host the first-ever "H-Acqfest," a day devoted to advanced work on and analysis of acquisitions and serials queries and reports. Several IACQ team members are registered to attend.

I-Share Cataloging & Authority Control Team

Cason Snow, Northern Illinois University, Chair

Accomplishments

- Planned and implemented two educational forums, in conjunction with IACQ, for I-Share catalogers. All of the forums were well attended.

- Presented joint program with IACQ, “Technical Services Workflow Analysis” September 10, 2008, Hilton Garden Inn, Champaign. R2 Consulting, a workflow consulting firm, presented basic information on how a library could begin to analyze workflows.
- Assisted IACQ with mini-forums held across the state as a follow up to the R2 workshop; these events were held February 3 in Chicago; March 18 in Greenville; and March 19 in Bloomington.
- “Spring Forum” April 30, 2009, University of Illinois Springfield.
The morning presentation focused on the upgrade to Voyager 7. The afternoon panel discussion examined technical services workflow analysis. Breakout sessions discussed new views of data in next generation public catalogs, and a wide range of topics focused on Acquisitions and Serials.
- Reviewed the charge of the group and submitted recommendations to IUG. The main changes were to emphasize metadata and collaboration with other teams.
- At the request of CARLI staff, drafted recommendations for specific bibliographic record data elements to be used with “reduplication” for searches performed using VuFind. This “reduplication” process improves the precision of the search results. The recommendations were accepted for possible future enhancements to the VuFind interface.
- Made recommendations on the new 996 field per OCLC’s revised Record Use Policy statement.

Future Objectives

- Planning fall forum with subject and venue TBD. The team polled attendees of the Spring Forum for in person or online meeting desirability. Poll results showed a slight preference for online meeting.
- Assist the CARLI Office with educational efforts regarding new cataloging functionality in Voyager version 7.
- Monitor developments in the pending release of Resource Description and Access (RDA), and establish contact with Illinois OCLC Users Group (IOUG) to explore possible collaborative efforts for training and other preparation for the implementation of RDA.
- Monitor the Program for Cooperative Cataloging response to the Library of Congress decision to end tracing of series, and update I-Share cataloging recommendations to reflect the PCC series tracing recommendations.
- Participate in Cataloging Electronic Resources/Electronic Resources Taskforce (2009).

I-Share Instruction Team

Randi Sutter, Heartland Community College, Chair

Accomplishments

- Using Social Technologies in Library Instruction Forum – April 2, 2009
- The Instruction Team organized a social technologies forum held at the University of Illinois, Springfield that included panel discussion on LibGuides and breakout sessions covering the use of different social technologies in library instruction. Topics included the use of wikis, clickers and other Web 2.0 tools. Over 80 participants attended the forum. Evaluation results were positive overall.
- Tutorial Workshops – June 5, 2009 at CARLI and June 12, 2009 at Columbia College
In previous years, the I-Share Instruction Team has created and modified online tutorials for the I-Share catalog. The reality of multiple OPAC interfaces and individual catalogs at each institution make tutorials created for only the classic version of the shared

catalog less useful for libraries than they may have been in the past. The Team perceived a need for training for I-Share librarians that would empower them to develop their own local online tutorials. With these considerations in mind, the Team focused its energy on educating members about the best practices of tutorial scriptwriting and storyboarding, and introduced free, open-source screencasting software via two hands-on tutorial creation workshops.

Future Objectives

- Because of the overwhelming response to the Online Tutorial Creation Workshops (with over 25 individuals on waitlists) future workshops will be planned in the coming year.

I-Share OPAC Team

Jonathan Gorman, University of Illinois at Urbana-Champaign; Amanda Pippitt, Millikin University, Co-Chairs

Accomplishments

- "Text me this call number" feature enabled in both WebVoyage and VuFind in both Universal and Local catalogs as an opt-out feature. Originally it was an opt-in since it was thought libraries might be concerned about possible abuse. However, overwhelming requests for implementation lead to a change to opt-out. At this time there are only 4 libraries who have not requested this feature.
- The appearance and functionality of links within the catalog to services like Google Books and Syndetics were discussed pretty heavily.
- WebVoyage and VuFind links to Google Book using Google Books API. Feature had to be disabled in both WV and VuFind but has since been re-enabled in VuFind.
- Format icons created and enabled in VuFind.
- Approved a number of minor improvements and corrections to the display of bibliographic data in both WV and VuFind.
- Reviewed and edited OPAC team charge for IUG.
- Reviewed and updated team priorities list at: www.carli.illinois.edu/comms/iug/iug-opac/iug-opac-reports/opac-tasklist.html
- Acted as VuFind advisory, acting as clearinghouse for concerns, questions, & suggestions.
- Documentation of code/"Search box generator" created for libraries to make customized WebVoyage search boxes to embed in library webpages.
- Completed and posted final WV test script. This project has inspired requests to other teams to create similar testing scripts for other Voyager modules.
- Reviewed VuFind FAQ.
- Usability testing: creation, editing, and submission of "draft of process for usability testing" to IUG. Created an initial list of issues/problems for usability testing (posted to team wiki).

Future Objectives

- Work to improve EndNotes/Refworks import from WebVoyage. A proof of concept for Refworks Direct has been created and information on the approach will be summarized in a report early this summer.
- Preparing for WebVoyage 7.0 upgrade this June 2009 and revise customization guidelines document
- Keeping an eye on Twitter applications for OPACs.
- Recommend further VuFind improvements in response to 1.0 release.
- Begin actual usability testing process in conjunction with Usability Testing Volunteer Group

- Continue discussion of future ILS (as concerns OPAC-related needs) with the consideration of 3 areas:
 - Service(s) we would like to provide but our current ILS doesn't accommodate [blue sky stuff]
 - Annoying functionalities/assumptions/requirements in our current system [distinct from limitations]
 - Functionalities in our current system that we think our users or we couldn't do without.

I-Share Resource Sharing Team

Dallas Long, Illinois State University, Chair

Accomplishments

- Offered two WIMBA sessions on best practices for resource sharing for distance education students.
- Provided circulation and callslip test scripts for future upgrade versions of Voyager
- Revised team charge to include advisory role for products supported by CARLI other than Voyager

Forums

A fall forum was planned with two topics. A morning session was planned on managing Electronic Course Reserves through different products used by I-Share libraries, and an afternoon session was planned on privacy and confidentiality issues in resource sharing. However a sufficient number of presenters could not be recruited so it was decided to postpone the topics and consider developing them in the future as WIMBA sessions.

Future Objectives

- Considering recommendations for language changes to patron blocks in the OPAC so the language is more helpful and explanatory for patrons.
- Review plans for the postponed Fall Forum and consider again for spring.
- Provide feedback for potential WIMBA sessions regarding feature changes and fixes in newest Voyager upgrade.

Respectfully submitted,
Carlos Melian, Chair, I-Share Users' Group
June 2, 2009