

7-20-2009

## I-Share Users' Group Minutes for July 20, 2009

Consortium of Academic and Research Libraries in Illinois

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## I-Share Users' Group Meeting

217-244-7532 and (toll free) 877-607-8979.

**Date: July 20, 2009 at CARLI Office**

### *Members Attending:*

Sarah McHone-Chase (2007-2010, St.U), Northern Illinois University  
Carlos Melian, (2006-2009 St. U) Northeastern Illinois University  
Mary Burkee (2009-2011, StU) University of Illinois Urbana-Champaign  
Keith Eiten (2007-2010, Pr), Wheaton College  
Jason Rossi (2009-2011, Pr) Robert Morris College  
Karen Whisler (2009-2011, StU) Eastern Illinois University  
Carol Reid (2007-2010, CC), Heartland Community College  
Alexis Rogers (2008-2010, CC) Lincoln Land Community College  
Belinda Cheek (2009-2012, Pr) North Central College  
Nancy Laverdiere (2009-2012, St. U) Western Illinois University

### *Members Absent*

Stephen Smith (2007-2010, St. U), University of Illinois at Springfield  
Sandy Craig, (2008-2011, CC) Illinois Eastern Community Colleges

*CARLI Staff Attending:* Lorna Engels, Kristine Hammerstrand, Cathy Salika

*Guests:* Susan Singleton

## **Decisions:**

- Introduction of New Chair, Sarah McHone-Chase
- Election/Appointment of Vice Chair Jason Rossi  
Secretary Carol Reid
- Minutes approved: As amended
- Next meetings:
  - August 21, 2009 (in person)
  - September 18, 2009 (in person)
  - October 16, 2009 (by phone)
  - November 20, 2009 (in person, Chicago)
  - – no December meeting—
  - January 8, 2010 (by phone)
  - February 19, 2010 (by phone)
  - March 12, 2010 (by phone)
  - April 16, 2010 (in person)
  - May 21, 2010 (in person, Eastern Illinois University)
  - June 11, 2010 (in person)

- New & continuing Liaison to Committees:
  - Instruction Team—Jason Rossi
  - Cataloging and Authority Control Team-- Alexis Rogers
  - Acquisitions & Serials—Karen Whisler
  - Resource Sharing—Mary Burkee
  - OPAC—Keith Eiten
- Each team will be invited to sit in on an IUG meeting during coming year

## CARLI Office Report:

- During Upgrade to 7.1, CARLI office added a category to the CARLI blog specific to WebVoyage display
- Have ongoing plan to reapply customizations that were present in older version(s). Some customizations need to be redeveloped and reapplied; updates will continue
- Two scheduled sessions on customization via Wimba July 23 and 24
- CARLI Annual Meeting is Oct. 30 at I-Hotel
- CARLI Board Meeting is September 25
  - Agenda items include another round of I-Share membership in 2010
- I-Share performance evaluations show continuing problems with records showing multiple holdings; CARLI office in discussion with Ex Libris
- Monitoring other projects including:
  - WorldCat Local pilot
  - VuFind open source development on hold
  - Ex Libris Focus group on URM (Unified Resource Management Sys) to replace WebVoyage contains CARLI staff members
  - Ex Libris possible patch to WebVoyage 7.1 this summer
  - Resource Sharing Code Task Force (Board Task Force) will be reconvening to complete its task
  - Trial of bX, a recommender software add on to SFX
  - EZ Search, a federated software by UIUC
  - WebFeat is being discontinued by Serial Solution. CARLI does not plan to replace it

## Team Reports:

- Acquisitions & Serials Team
  - *Meeting is upcoming*
- Cataloging and Authority Control Team
  - *Meeting is upcoming*
- Resource Sharing Team
  - *Meeting is upcoming*
- Instruction Team
  - *Meeting is upcoming*
- OPAC Team (Keith Eiten)
  - Amanda Pippitt (Millikin) is Chair
  - Discussed benefits of meeting in person , on phone or via WIMBA
  - Discussed ‘enhanced brief record’ and have recommendations ready; this will be the default view.

Discussed expansion or contraction of some fields. Libraries will have options for other record views

- Customization guidelines and standardized views are important
- OPAC enhancements requested by libraries are being considered
- Bulleted list of customization prioritized or scheduled for usability testing
- Possible Spring forum, how to run usability testing or possible forum/webinar topic: how to customize WebVoyage.

## **Agenda Items:**

### **Review of Forums**

- Copyright forum
  - Was well received and attended, sponsored jointly with Public Services Group
  - Money from Programming and Planning Committee will need 6 month lead
  - Possible repeat with different speaker or Wimba session or sessions (monthly)
  - Lorna will look for possible speakers for Spring or monthly Forum
- Reports Forum
  - Previous Forum well received
  - Possible creation of a Task Force to oversee Spring Forum
  - find experts in area within CARLI membership
  - Creation of Reports Interest Group (email list)
  - Nancy, Cathy and Jason will look at interest group, task force, etc
- Liaisons Forum
  - Best in Spring, possibly by Wimba
  - Round table discussions of ILS uniformly popular, repeat on another topic?
  - OPAC team presentation on customization guidelines with small breakouts

### **Susan Singleton**

- XC or eXtensible Catalog update
  - Most of the toolkits are near completion
- OLE discussion continuing
- Adding content to VuFind interface; ICE from Syndetics, indexed summaries & T of C
- Resource Sharing Standardization
  - includes 3 possible solutions:
    - ultimately patron's responsibility;
    - central fine fund ;
    - a library is financially responsible for items their patrons check out
  - Standards should be set by end of 2009 and included in yearly I-Share agreement (will also speak to collection development standards)
- Cooperative Collection Management
  - Collections of things non-essential can be better coordinated
  - I-Share libraries should not stop collecting and depend on shared collections
- IUG should keep examining ILS and open source marketplace

## Updates on Task Force

- Usability
  - Clarification has been sent out
  - 16 responses; volunteer list will go to Paige and OPAC Team
  - Email list created, active after end date of July 30
- CATer (Cataloguing Electronic Resources)
  - 5 people responded, this could be optimum size
  - Group will look at gaps in experience and ask for more members if needed
  - Another call for volunteers sent next week
- Ad Hoc Task Force for Reports (see discussion under Forums)

## Discussion of ILS

- A variety of sources were shared
  - OCLC report  
<http://www.oclc.org/us/en/reports/onlinecatalogs/default.htm>
  - NISO Forum  
<http://www.niso.org/news/events/2009/lrms09>
  - Library Technology Report (Nov/Dec 2008 issue)
  - Lorna's list of webpages
- Lots of vendors selling 'cloud' storage, hosting and support
- Review sources and discussion to continue next meeting

## Future Agenda Items

- Determine questions to ask teams attending meetings
- Invite teams to meetings, starting with September
- Forums (liaisons and copyright)
- Fines and Fees for Universal Borrowers
- Future of ILS