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I-Share Resource Sharing Team Minutes for July 23, 2009

Consortium of Academic and Research Libraries in Illinois

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CARLI I-Share Resource Sharing Team Meeting

July 23, 2009 CARLI Office

Members attending:

Deborah Campbell (Millikin University)
Marilyn Clay (Oakton Community College)
Susie Duncan (University of Illinois at Urbana-Champaign)
Li Fu (Chicago State University)
Pam Greenlee (Olivet Nazarene University), via conference call
Dallas Long (Illinois State University)
Rachelle Stivers (Heartland Community College)
Candace Walter (Southern Illinois University at Edwardsville)

Members absent:

Peggy Roth (Western Illinois University)

IUG Liaison:

Mary Burkee (University of Illinois at Urbana-Champaign) is the new liaison but was unable to attend.

CARLI staff attending:

Mel Farrell
Lorna Engels
Susan Singleton

Introductions and Committee Procedural Briefings

- New members were welcomed to the I-Share Resource Sharing Team.
- Susan Singleton, CARLI Executive Director, discussed new products and services that CARLI is currently exploring, including "Rapid," for article deliveries between CARLI members. Singleton has approached Ex Libris to engage in possible specialized programming on our behalf. Singleton discussed plans for the next ILS, estimated for a 2013 launch that could potentially be based on Open Source code. She also noted developments toward web-scale systems by OCLC or Serials Solutions.
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- Dallas provided an overview of the Resource Sharing Team's relationship to IUG, organization and structure of meetings, etc. Minute-taking responsibilities will rotate alphabetically among members, beginning with Debbie at the August meeting. Susie volunteered to assume the remainder of Tony Heaton's 2-year term of appointment. The new members will have 3-year terms of appointment.

CARLI Report (Mel and Lorna)

- CARLI is preparing a new office newsletter and training schedule.
- Casey Sutherland will host a MACRO Express workshop for Circulation on September 15th. Save the Date notice has already gone out via e-mail.
- CARLI's annual members' meeting will be October 30th at the I-Hotel in Champaign. The meeting will include an "All Chairs" breakfast.

IUG Report (Lorna)

- Mary Burkee is the new liaison to the I-Share Resource Sharing Team, as Sarah McHone-Chase is the new Chair of IUG.
- The OPAC Team is considering a Fall Forum on Usability Testing. Digital Collections Users Group and I-Share User's Group are considering a joint Forum regarding copyright as it pertains to digital formats & E resources. CARLI is unable to hire Thomas Lipinski to speak again due to payment rules regarding UI adjunct faculty. Speakers being considered are Dwayne Butler from the University of Louisville or Fritz Dolak from Ball State University.
- The majority of the I-Share teams have not met yet so no information is available at this time regarding other team activities.
- IUG will meet with each Team during the course of the year. Resource Sharing Team's date with IUG is November 20th and will be held by conference call. IUG has not yet decided if the meeting will be with as many Resource Sharing Team members who are interested in participating or simply with Dallas in his capacity as Chair.

Fall Forum

- "Back to Basics and Looking Forward" is the theme of the Fall Forum. Forum will be divided into approximately seven presentations: Blocking/Unblocking/Suspending Patrons; Callslip Processing; Customizing Notices; Customizing Ini Files; Patron Record Management; Contacting CARLI for Support; and Future of the ILS.
- October 14th 2009 is the preferred date for the Fall Forum, with Oct. 13th and 15th as alternate dates. Governors State University is the preferred location. Chicago State University is the alternate location.

Action Item: Mel will ascertain Governor State University's availability and inform the Resource Sharing Team.

Action Item: Li will ascertain Chicago State University's availability, if GSU is unable to host

- Members were assigned to present the Forum presentations or assigned to seek suitable presenters by the next meeting date. Blocking/Unblocking Patrons (Susie & Candace), Callslip Processing (Peggy Glatthaar?), Customizing Notices (Mel), Customizing Ini Files (Debbie), Patron Record Management (Marilyn), CARLI support procedures (Lorna) and Future of the ILS (Mel and Lorna). Dallas is the "master of ceremonies."

Action Item: Susie will ask Peggy Glatthaar (University of Illinois at Urbana-Champaign) to present on Callslip Processing.

Wording of UB Courtesy Notices

- Customizing the text of the e-mail UB courtesy notice was brought to the Resource Sharing Team for discussion. Resource Sharing Team can issue a "best practices" recommendation but CARLI is unable to make a global edit to the UB courtesy notice template because the template lives on the mdb.file of each Voyager workstation that produces courtesy notices. A template could be pushed out to such workstations using the automatic update checker, but not all libraries use the update checker. Libraries who update their Voyager clients manually would have to manually change their templates. An

investigation of whether the owning library's phone number could be included in the courtesy notice was not fruitful. Agreed upon language is: "Please contact us at: (library's phone number or e-mail address).

Action Item: Mel will send out summary of discussion and directions on how to update the text manually.

Circ Job 43

- Circ Job 43 is running behind the scenes and should allow us to delete patrons whose MyAccounts appear to be in good standing but who have outstanding fines, fees, etc.
- Confusion reigned regarding the lost item counters. Mel and Cathy Salika are still investigating how the counters are impacted by UB standardization.

Future Meetings

- Meeting dates were decided as following: August 13th, September 10th, October 8th, November 12th, December 10th. Conference call number is 1-800-392-1565. All meeting times will be 2 pm - 4 pm.

Next Meeting Date:

August 13th, 2009, 2 pm - 4 pm