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# I-Share Acquisitions and Serials Team Minutes for September 16, 2009

Consortium of Academic and Research Libraries in Illinois

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## I-Share Acquisitions & Serials Team Minutes

September 16, 2009

**Members Present:** Anne Hudson (CARLI), Randy Kuehn (IWU; Co-chair), Barbara Brandt (ISU), Lynette Fields (SIE), Karen Whisler (EIU, IUG Liaison), Sharon Nelson (NIU), Azungwe Kwembe (CSU), Kati Donaghy (ERK), Sara Blaszczyk (UIC).

**Via Phone:** Missy Laytham, (NPU), Jen Masciadrelli (CARLI), Christophe Anderson (COL; Co-chair)

Meeting started 11:09 AM

1. August 7 minutes were approved unanimously.
2. CARLI report - Jen
  - The switch back to old Webvoyage solved performance issues. ExLibris developers visited CARLI and sat down with staff to figure out the problems with Version 7 of the OPAC. They are still working on it. Part of the problem is there are multiple copies of each database, i.e., 76 copies of Tomcat. CARLI has the largest number of libraries running Voyager of all the ExLibris clients.
  - There will not be an application period for new libraries in 2009-2010, so CARLI can focus on resolving performance issues.
  - Registration for the Audiovisual Preservation Forum is open. Registration for the CARLI Annual Meeting will open shortly. The meeting is to be held October 30 at I-Hotel in Champaign.
  - Anne reported that four new libraries have gone to EDI (electronic data interchange) or are working on it with her.
3. IUG Liaison report - Karen
  - The Acq & Serials Team is going to join IUG in a conference call on Friday September 18 at 11 AM CDT. Karen gave the phone numbers to call in. Below are several questions the team considered in preparation for the conference call.
    1. *Is there something you've thought about doing and couldn't without additional resources or help from CARLI?* None.
    2. *Is there another way of doing things besides monthly meetings and forums?*
      - Wimba, Google docs are utilized
      - Face to face works best
      - Conference calls with topics
    3. *What services would you like to provide to patrons with the next ILS?*
      - Christophe - interaction with business offices.
      - Randy - live reports.
      - Christophe - link in I-Share to request material for purchase.
      - Kati - info fed to selectors when a book is received.
      - Karen - simpler acquisitions for non-acquisitions staff to be able to see circulation data.
      - Kati - not to have to go to Acq. Module to see everything
      - Christophe - real ERMS within the ILS. Karen mentioned a product announcement by ExLibris for a URM (Universal Resource Manager).
      - Randy - web based vs. installed clients
      - Karen - ASP pages that give reports (or Unix) vs. Windows

- Sara – batch deletes
  - Randy – has set up a program to run a daily budget, report items on order and items received. The reports are automatically created and stored in selectors' web folders. We can conceive of this being a function of the ILS.
  - Sharon - take Nackil Sung's programs and put them on a page, asp or Cold Fusion (Unix)
  - Sara - new books pages enhancement
  - Anne - media booking
4. *Are there any questions about IUG?* The IUG advises CARLI and each team has a liaison to IUG who reports on their work; they also look at stuff coming down the pike
  5. *What would you like your liaison (Karen) to bring you?*
    - Randy – keep updating us on the future of ILS
    - Karen reminded us that all IUG minutes are on the CARLI web pages.
4. Wimba tutorial - Though we may not have Wimba after the contract expires, the team decided it would be beneficial to have training and we could transfer our skills to a new e-rooms platform. For our next meeting Oct. 21st Jen will get admin logins and we will use the meeting room for Wimba training.
  5. The team deferred finalizing the date, location and topic of the Spring Acq & Serials Forum until the next meeting, Oct. 21.
  6. Updates to Acq/Serials FAQs
    - Anne – Info about the process of moving to EDI can go into the Wiki.
    - Missy – Several questions about Voyager PO creation and corrections. She will send the questions to the IACQ list and members will answer them.
    - Sara – Can an FAQ show how to assign multiple ledgers to one line item by percentage?
    - Team members are encouraged to send in FAQs suggestions to the list.
  7. Ideas for next open Conference Call and/or Spring forum
    - Workflow efficiency with 3rd party systems – EDI, EOD and GOBI, Banner, People Software. (Term definitions: EDI: Electronic data interchange – coded invoice, price, can map it and feed it to Voyager. Save PO in EDI and order from vendor. EOD: Embedded order data – for order creation. Creates PO, bib record, assigns ledger.)
    - Mentoring acquisitions and serials librarians
    - ERMS Integration w/Banner, Peoplesoft, Voyager
    - Co-sponsoring (?) Dwayne Buttler in CARLI copyright forum, explain fair use and when to get permissions to use electronic and digital stuff
    - EDI, EOD and workflows with emphasis on cross-training acquisitions staff to adapt to changes in cataloging work flows because of the auto selection of catalog records.
    - Rather than start the Wiki discussion, it was decided that Randy will send out discussion and task assignments to our email list.

Meeting adjourned at 1:50pm

Respectfully Submitted, Sarah Blaszcak