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I-Share Acquisitions and Serials Team Minutes for February 24, 2010

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I- Share Acquisitions & Serials Team Minutes

February 24, 2010

CARLI Office

Members Present: Christophe Anderson (COL, Co-chair), Kati Donaghy (ERK), Lynnette Fields (SIE), Anne Hudson (CARLI), Azungwe Kwembe (CSU), Missy Laytham (NPU), Jen Masciadrelli (CARLI), Karen Whisler (EIU, IUG Liaison).

Via Phone: Sara Blaszcak (UIC), Barbara Brandt (ISU), Randy Kuehn (IWU, Co-chair).

Meeting started at 11:05 a.m.

1. January 27 minutes were approved unanimously, with minor corrections noted.
2. CARLI Report – Jen
 - Two announcements were broadcast to member libraries.
 - The first announcement covered the CARLI-purchased Springer e-book medical collection (and the complete e-books collection that some libraries opted to purchase). Casey Sutherland and Gordon Fellows created documentation to load these e-book bibliographic records into the local catalog. The records that CARLI received required a lot of data massaging to get them in good condition. Five libraries are now in the data load process. This documentation should be useful to libraries that want to load bibliographic records of other e-resource items or collections that they have. The documentation is available on the Cataloging documentation page of the CARLI website.
 - The second announcement is that, effective March 1, there will be a new reports environment that updates information every 15 minutes, as opposed to once daily. This is good for acquisitions staff because current expenditures will be reflected almost immediately when reports are run against the server. Casey Sutherland communicated with I-Share libraries about how this change affects users of Gary Strawn utilities.
 - CARLI is switching to Adobe Connect, a new webinar software. Jen highlighted voice over IP and record/save as some of the new features. This product requires that users download a small software package. It appears that Adobe Connect is more powerful than Wimba. The Wimba contract expires in March.
3. IUG Report – Karen
 - IUG met via phone on February 19. Their next meeting is March 12 via phone.
 - Liaison reports:
 - ICAT Team. No report.
 - Instruction Team. They have scheduled a mobile technologies forum on June 18 at Wheaton College Conference Center.
 - OPAC Team. They are refining VuFind displays and planning usability testing webinars.
 - Resource Sharing Team. They are planning webinars that cover reports for troubleshooting circulation problems and they are working on their wiki. Also, CARLI has created a program to allow removal of library fines of \$4.99 or less.
 - The Liaison forum is June 10 in Champaign. IUG is working on the agenda. IUG plans to invite Team Chairs to participate in a morning panel presentation in which they would give short annual

reports and share Team activities and concerns.

- IUG is issuing an open invitation to all Teams to participate in a call-in meeting similar to what was done last year. Karen will schedule a date with IUG if our Team chooses to participate.

4. Forum Planning

- Randy announced that he begins a new position as systems librarian at University of Louisville effective March 8. Therefore, he will not be able to continue serving on the Acquisitions & Serials Team, nor will he be able to participate in the upcoming forum.
- Jen reported that Elaine Fetyko Page of Elmhurst has agreed to present EDI at the forum. Elaine and/or a combination of her staff will talk about their experiences using EDI for both incoming and outgoing procedures. Christophe will contact Elaine to provide more information.
- At the forum Anne Hudson will introduce what CARLI does, Christophe will talk about EOD, and Elaine and Anne will talk about EDI.
- Randy agreed to write some documentation about his automation of moving files. He said that automation of reports is the more interesting process. He will send a copy of a code that they put in and modifications that they made. Jen suggested that CARLI can determine if there are ways to share that information with other member libraries.
- The forum registration count is at 46
- Regarding the afternoon breakout sessions, 24 expressed interest in acquisitions workflow by library size, 20 in the future of the ILS, 20 in getting started with EDI and EOD, and 20 in new functionality in Voyager. Consensus was that all four sessions should be offered at both breakout sessions, and participants should be allowed to wander from topic to topic. We anticipate that participants will have either very specific or general workflow questions. Christophe suggested that each leader have a few questions prepared as discussion starters.
- Room assignments, leaders, and note takers were volunteered/assigned as follows:
Acquisitions Workflow by Library Size (Sun Room) – Kati will lead; Missy will take notes
Kati requested that someone from a large library be paired with her. Jen will contact Marlene Slough from Eastern.
Future of the ILS (Legislative Room) – Sharon will lead; Karen will take notes
Getting Started with EDI and EOD (Auditorium) – Anne and Christophe will lead; no note taker needed; Christophe will ask presenters with accounting office experience to participate in this session
New Functionality in Voyager (Auditorium) – Jen will lead; may not need a note taker
- People requested flip charts for the breakout sessions. Jen will organize this.
- Ten people signed up for a library tour.
- Forum registration will close March 10. Jen needs all handouts by March 10. Leaders of the breakout sessions will need to remind participants to complete the forum's evaluation form.
- There was a brief discussion about the morning panel sessions. The first panel is scheduled for one hour. The second panel will have 45 minutes. Sara's part will be brief, followed by a time for questions. Lisa and John will take the remainder of that session time for their part.
- Jen will send a reminder to registrants. She will put links to CARLI documentation that could help participants prepare for the forum. And Jen will include information about parking.
- Jen requested that Team members arrive around 9:00. Registration begins at 9:30. Barbara will assist with registration. Christophe will do the welcome at 10:00.

5. Kati invited Team members to visit Eureka College for the Public Services Working Group Open Houses on March 11. She is willing to show her one-person technical services department.

6. Progress on Wiki Document Assignments (using Anne's Random Thoughts document of 1/25/2010)
- All suggested updates should be sent to Jen, if they haven't been sent already.
 - Kati will complete the two Client Download and Configuration documents by next meeting
 - Christophe and Anne completed the Acquisitions documents except for Claiming and Cancellation. Kati and Barbara will review those two documents.
 - Lynn, Sharon, and Missy completed everything except Claiming and Cancellation documents. Those documents are being reviewed as recorded above. We discussed the Publication Patterns document regarding content and size.
 - Randy completed the Reports and Statistics section. Cathy Salika checked all links recently.
 - Randy and Anne sent out revised ideas for section on Communication with Other Voyager Users.
 - Agreement was to add a link to IACQ minutes, keep the Voyager 7 Upgrade Scripts, and that documents need reviewing for accuracy and completeness.

7. Wiki Structure

- Jen asked if everyone is able to get into the IACQ Team wiki. Please contact her if problems.
- Discussion ensued about wiki structure. Consensus was that the structure should start with a headings level and drill down to specific information. Each heading would be annotated. The wiki should also include a "New to Acquisitions" section as Sharon had suggested via email.
- There was debate about whether documents should be repeated in different sections or listed in only one place. Should acquisitions be separated from serials?
- There was also discussion about the types of information that would be found on the private wiki, the public wiki, and the CARLI website. Anyone would be able to contribute to the public wiki, adding documentation such as workflow procedures. The CARLI website would remain the location for official documentation.
- There was a lot of discussion about how others would use the public wiki, how they would add information, and whether any contributions would ever be transferred to the CARLI website.
- The Team brainstormed a possible wiki structure using the conference room white board. (See the hierarchy that Jen added to the Team wiki page on February 25. "Acquisitions & Serials Documentation" is at http://wiki.carli.illinois.edu/index.php/IACO_Team). Once the structure is agreed upon, the next step will be to make annotation assignments.
- Discussion continued about the "fit" of documents such as quarterly conference calls. There are also problems with formatting some of these documents.
- We discussed the draft of the "Communication with Other Voyager Users" section that Anne and Randy created. Most conversation centered around renaming the section. We settled on "Conversations Among I-Share Users." Kati suggested embedding links from conference calls and forum presentations listed in this section to official documentation listed on the CARLI website.
- Christophe offered to post annotations to the Acquisitions portion of the structure that Jen creates.

The IACQ Spring Forum is Wednesday, March 17 (wear green!).

The next IACQ Team meeting is Wednesday, March 24 (conference call only).

Our Wink training is scheduled for the Thursday, April 29 meeting.

Meeting adjourned at 1:50 p.m.

Respectfully submitted,

Missy Laytham