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

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I- Share Acquisitions & Serials Team Minutes

March 24, 2010

11:00 a.m. – 1:00 p.m.

Conference Call Only

Members present: Christophe Anderson (COL, Chair), Barbara Brandt (ISU), Kati Donaghy (ERK), Anne Hudson (CARLI), Missy Laytham (NPU), Jen Masciadrelli (CARLI), Sharon Nelson (NIU), Karen Whisler (EIU, IUG Liaison).

Members Absent: Sara Blaszcak (UIC), Lynnette Fields (SIE), Azungwe Kwembe (CSU).

Meeting commenced at 11:04 a.m.

1. Confirm Minute Taker (Sharon)
2. February 2010 minutes were approved as corrected.
3. CARLI Report – Jen
 - No major developments since the CARLI report given at the Acq/Ser Forum the previous week, except a reminder that the volunteer database is open for the various teams, so if your IACQ term is ending and you're interested in re-upping, you can volunteer to do so. If you know of anyone else who would be a good team member (on this or any other team), please ask them to volunteer.
 - Anne added that this is her last IACQ meeting because the CARLI data services group has been reorganized. However she is willing to help with individual tasks for the Team as needed – just let her know.
4. IUG Report – Karen
 - IUG met on March 12, 2010 by phone. The next meeting will be held on April 16, 2010 in Champaign. Liaison Reports: Instruction Team is planning a forum, June 18, Wheaton College Conference Center on mobile technologies; OPAC Team is refining VU-Find displays and planning webinars on usability testing; Resource Sharing Team is planning webinars on reports for troubleshooting in April and are beginning planning for a Fall Forum.
 - The Liaison forum scheduled for June 10; as part of a morning panel, IUG would like Team chairs to present a brief annual report and share team highlights, activities and concerns.
 - The CatER Task Force has sent out a survey to member libraries regarding their e-resource cataloging practices.
 - Susan Singleton sent in a proposal to clean up language on appointing people to committees, some of which was a holdover from ILCSO days. She is taking it to the Board for approval.
5. Forum recap and evaluations
 - Christophe noted the forum seemed to be a success; Jen felt it went well also. Christophe suspected the second panel was going to be too technical, and from the evaluations that seemed to be the case; however he found it interesting. While some attendees didn't find it relevant to their institution's situation, it was useful to others.
 - Additional evaluation comments:
 - Many forums don't seem to have enough content to fill 5 hours. This comment should be something to keep in mind; we either need to find more content to fill a forum or consider

different formats. In-person meetings do have the benefit of personal networking, especially at a smaller meeting. If we have a topic that might be interesting and fill about an hour, we can always set one up periodically as a webinar without tying it/turning it into a "forum" per se. (e.g., complex publication patterns. Someone asked for this on the evaluation form and it was also mentioned to Jen at the forum.) Tammy's person at Lincolnland (Alexis) is really good at CPPs and would be a possible resource person to contact.

- The Workflows breakout session fostered some good networking – "oh, you're a similar size to us – let me get your contact info."
- The recommendation to have the forums repeated geographically (one north and one south) comes up frequently with all CARLI forums and training. It is understandable, but the logistics of getting speakers in two different places etc. is difficult and expensive. In general southern locations have lower attendance than mid-state or northern locations. Sometimes this is just a matter of bad timing (the upcoming Carbondale event is in April at end-of-semester crunch time).
- One suggestion received was to offer library tours as an alternative to breakouts, instead of after breakouts, because many people wanted to leave at the end of the day. Karen stayed and found the robot retrieval system very interesting. About 10 people attended the tour.
- Attendees seemed to have been confused as to how to fill out "frequency" question on the evaluation, so Jen is not sure how useful those responses are.

6. Wiki discussion: Jen's layout is viewable at

http://wiki.carli.illinois.edu/index.php/Acquisitions_and_Serials_Documentation

- Jen has started putting in links on the individual sub-pages and added a link back to the main page on each sub-page. After Jen adds all the links, the assignments for who will do which annotations will be done at the April meeting. Some titles are self-explanatory and may not need annotations.
- Kati is working on the client download and configuration documents. Kati and Barbara are also working on the claiming and cancellation documents. These documents are quite old and need revision in light of experience with Voyager; also breaking out by monographs and serials makes more sense as the processes are quite different and of interest to different persons. Page references also need updating; they refer to the v.6.5 Acquisitions User Guide and need to be updated to 7.1.
- Anne and Randy completed the reports and statistics section.
- The "New to Acquisitions? Start Here" document is still a 'go' but a section needs to be added for it. Sharon will write the document after the links are finalized so links in her document will go to the right places.

7. Tutorials

Next month's meeting will include Wink training in Champaign. The rest of the meeting was brainstorming ideas for storyboarding/scripting and sample tutorials to work on in our training.

1. possible topics and who is working on them, if a volunteer was indicated

- monographs claiming
- setting up serials POs (weird jump to Serials Maintenance and how to set up your session defaults to make this easier—Sharon will do)
- the difference between "mandatory" and "optional" fields/functions (e.g. in setting up a PO)
- split allocations (Sharon)
- things that Acq people have to do in Cataloging, and vice versa (though maybe this varies too much by institution?)

- \$nouc option
- setting up defaults and workflows (Kati)
- "Best practices" (not really a tutorial, but) – e.g., documentation about the ramifications of deleting POs and why a library may or may not want to do this

2. Housekeeping for Tutorials

- Jen will ask our Wink trainer (Amy at North Central) about how prepped we need to be to have stuff ready to create a real tutorial (e.g., just a list of steps to put in tutorial). The Acq client will be on the training PC and the training database will be accessible so we can do screen shots.
- The finished tutorials will be put in the wiki. Procedures could also be posted to wiki even if there is no video tutorial, and/or in addition to the videos.

Meeting adjourned at 12:04 p.m.

Respectfully submitted,
Sharon L. Nelson