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# I-Share Users' Group Annual Report Fiscal Year 2010

Consortium of Academic and Research Libraries in Illinois

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## I-Share User's Group Annual Report 2009-2010

### Membership

Mary Burkee (2009-2011, St. U) University of Illinois Urbana-Champaign  
Belinda Cheek (2009-2012, Pr) North Central College  
Sandy Craig (2008-2011, CC) Illinois Eastern Community College  
Keith Eiten (2007-2010, Pr) Wheaton College  
Nancy Laverdiere (2009—2011, St. U) Western Illinois University  
Sarah McHone-Chase (2007-2010, St. U) Northern Illinois University, **Chair**  
Carlos Melian (2009-2012, St. U) Northeastern Illinois University  
Carol Reid (2007-2010, CC) Heartland Community College, **Secretary**  
Alexis Rogers (2008-2010, CC) Lincoln Land Community College  
Jason Rossi (2009-2011, Pr) Robert Morris University, **Chair-Elect**  
Stephen Smith (2007-2010, St. U) University of Illinois at Springfield  
Karen Whisler (2009-2011, St. U) Eastern Illinois University  
(*CC=community college; Pr=private; and St. U= state university*)

CARLI Staff Liaison: Lorna Engels

The year's work for the I-Share Users' Group (IUG) was marked with a continuation of the discussion concerning the "future of the integrated library system (ILS)"; a discussion with the IUG Teams about resource needs, communications, and how IUG may assist; and a discussion how IUG might reposition itself strategically to fulfill its charge. The year also has been very productive for IUG and the I-Share Teams with forums held throughout the year and a task force investigating electronic resources and its impact on cataloging for the OPAC. IUG and the I-Share Teams are here to provide the consortium membership assistance with needs that are identified and evolve in a dynamic environment; our activities are detailed in this annual report.

### **Future of the ILS**

IUG has been continuing the discussion of the "future of the ILS" by evaluating the options present in the current development environment and by reviewing sources that discuss future integrated library systems. Each of the I-Share teams engaged in a discussion of the future of the ILS in one of their forums over the past year. A wiki was created to centralize and organize the information obtained from all of these discussions and on ILS research and options. A key question in the discussion of the ILS has been the advantages between open source and turnkey systems. IUG in the future is planning to look at priorities that could be established in helping set the parameters in how we evaluate a potential ILS.

### **Team Meetings**

IUG met with each I-Share Teams at one of their meetings in the fall to better assist the teams with communications and needs. Each team was asked the following questions: Is there something they would like to do as a group, but do not have the resources to implement? Is there a way to do things (i.e. monthly meetings & forums) better? What services would you like to provide your patrons that would be helpful in a future ILS? What mechanisms of communication from IUG are needed? Are there any questions for IUG?

## **IUG Reevaluated**

IUG will be adapting to the new economic realities in the upcoming fiscal year in several ways with direction from CARLI Executive Director Susan Singleton. The new fiscal year will be a year of transition as IUG changes its composition and perspective. IUG will be adding two CARLI Board members to the committee, reducing the meeting schedule, inviting experts to consult on topics, and focusing on strategic resource sharing and guidance to the board. IUG recommends a synthesis between the high level guidance and the day to day concerns identified by Teams. The next fiscal year will provide IUG with many opportunities in this current environment to help address the needs of the consortium as the ILS landscape evolves.

## **Task Forces**

- Usability Testing Volunteer Group  
This task force was a continuation from the previous year which was requested by I-Share OPAC Team. The charge was created in the previous fiscal year and this year a call was made for volunteers. Thirteen people from eleven institutions have volunteered for the Usability Testing Volunteer Group. The I-Share OPAC Team presented a webinar to assist the task force with parameters and methods.
- Ad hoc Task Force on Statistics and Reports  
IUG put out a call for volunteers to present at a forum/webinar on the topic of statistics and reports to better serve the CARLI member libraries. However, this Task Force was tabled due to the lack of volunteers.
- Cataloging Electronic Resources/Electronic Resources Display (CATER)  
The CATER task force is currently writing their report from their investigation of cataloging electronic resources best practices and should be done by the end of June.

## **Forums/Workshops**

- Liaisons' Forum  
The Liaisons' Forum was canceled this year due to the economy and its impact on member institutions. IUG opted instead to promote webinars on VuFind Universal Catalog presented by the CARLI staff.
- Copyright Workshop  
A Copyright Workshop was held on April 28, 2010 at the I Hotel in Champaign, which was sponsored by IUG and the Digital Collections Users Group, and funded by the CARLI Program Planning Committee. The workshop presenter was Dwayne Butler from the University of Louisville. This was a well-received program, and IUG and DCUG are grateful for the funding provided to make it possible.

## **IUG Future Objectives**

- Continue with "future of the ILS" discussions and establish a priority list.
- Monitor the Usability Testing Volunteer Group.
- Focus on strategic planning for resource sharing.

- Work with CARLI and the Board to redefine IUG in the new current dynamic environment.

### **Summary of Team Activities**

Below are brief summaries of each Team's annual assessment of their specific activities and future objectives.

### **I-Share Acquisitions and Serials Team (IACQ)**

*Christophe Andersen, Columbia College Chicago, Co-Chair and Randy Kuehn, Illinois Wesleyan University, Co-Chair*

### **Accomplishments**

- Sponsored the I-Share Acquisitions and Serials Team (IACQ) Spring 2010 forum "Voyager Talks! Making Voyager Communicate (with your vendors and others)": This all day forum on techniques to make Voyager work more efficiently with vendors, accounting software, and electronic resource management systems took place on March 17, 2010 at Chicago State University's Library. Three IACQ members participated on the morning panels: Christophe Andersen, Sara Blaszczyk, and Anne Hudson. During the afternoon portion of the forum, participants had a chance to meet in small groups to discuss various acquisitions and serials issues as well as time for networking and informal discussion. Overall the participant's evaluations of the forum were positive. Participants especially seemed to appreciate the time to meet with colleagues from other institutions while a few evaluations suggested the need for more content to fill up a day long forum.
- Began a revision of the IACQ Wiki on the CARLI website:  
Due to the variety of documents for acquisitions and serials librarians linked from various places on the CARLI website, IACQ decided to create a one-stop location for those documents on our wiki. This process has involved looking at our current wiki, locating, reviewing, revising, and annotating documents related to acquisitions and serials, and creating an organizational structure for those documents on the revised wiki. While the documents themselves are still housed in a variety of locations, making them accessible in one spot should make it easier for CARLI members to locate and use these valuable documents. The team is currently in the final stages of completing this process and expects to finish before the end of the 2009-2010 fiscal year.  
Until this process is complete we are keeping the pages hidden from public view.
- Participated in a conference call about the future of ILS:  
IACQ participated in a conference call with IUG on September 18, 2009 regarding the future of ILS. IACQ provided opinions on what functions are essential in a new ILS and also what functions we would like to see included in a future ILS that are not currently available in Voyager.
- Held a training session on the tutorial and presentation software Wink:  
The afternoon portion of IACQ's April 29, 2010 meeting was devoted to hands-on training on the tutorial software Wink. Aimee Walker from North Central College gave us an overview of the main functions of Wink, showing us how to make a short tutorial on searching the library's catalog. IACQ plans to use Wink during the next year to make a series of acquisitions related tutorials that will be available from our Wiki.

## **Future Objectives**

- In the next few months, IACQ expects to make the reorganized wiki available to CARLI members. This will involve some amount of publicity on the part of next year's IACQ team.
- The team will also be moving forward on tutorial making in the next year now that we have completed our Wink training. The first steps will involve deciding topics and scripting our tutorials, which will likely begin during the summer months. Possible topics that have been discussed include monographs claiming, setting up serials PO's, split fund allocations, and setting up defaults and workflows in Voyager.

## **I-Share Cataloging & Authority Control Team**

*Priscilla Matthews, Illinois State University, Chair*

### **Accomplishments**

- Planned and implemented two educational forums, including the first webinar-based forum for ICAT. The forums were well attended and generally well received.
  - 4 sessions with 3 unique presentations (one session was repeated) were presented via Wimba on Dec. 2 and 3, 2009. Presentations included: Revisions to ICAT's "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" document (repeated each day); one session had two presentations on authority control; the remaining session included three presentations on local use of CONTENTdm to access local digital collections
  - In-person spring forum with several discussion topics was held on May 18, 2010 at Kankakee Community College. Topics included the Future of the ILS, authority control practices at small, medium, and large libraries, breakout sessions on genre headings and metadata projects, and a report from the CatER task force.
- Major review, conceptual revision, and expansion of ICAT's "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" document (results presented at "fall forum" webinars in Dec. 2009). New maintenance projects were added in Spring 2010 to address newly discovered data problems preventing bibliographic records from loading into the new VuFind Union Catalog.
- Implemented a wiki for internal team use.
- Tested revised consortial tag tables for the cataloging client, released in Feb. 2010. Second revision to accommodate TB258 begun.
- Participated in Cataloging Electronic Resources/Electronic Resources Taskforce discussions and identified probable option for revision of Cooperative Cataloging Guidelines after the CatER task force report is accepted.
- Participated in the Future of ILS discussions held by IUG.
- Prepared best practices statement on OCLC 029 field at the request of several members.
- Began planning for educational forums for September 2010 (two webinars: recently enacted cataloging changes at the national level, and getting started using the Strawn utilities in I-Share libraries) and October 2010 (MarcEdit workshops, with funds from the Program Planning Committee).

- Began discussion on assessing how to determine best practices for series treatment by CARLI libraries in the current cataloging environment. Initial assessment focused on current indexing, and if deemed necessary will move on to a survey of current series practices among CARLI members.

### **Future Objectives**

- Implement cataloging changes and Strawn utility webinars (September 2010)
- Implement MarcEdit workshops (October 2010)
- Plan and implement spring 2011 educational forum/webinars as needed
- Monitor developments in the pending release of Resource Description and Access (RDA), and establish contact with Illinois OCLC Users Group (IOUG) to explore possible collaborative efforts for training and other preparation for the implementation of RDA. As of April 27, 2010, release is still scheduled for June 2010 per <http://www.rda-jsc.org/rdapubdate.html>

### **I-Share Instruction Team**

*Rebecca Martin, Northern Illinois University, Chair*

### **Accomplishments**

- **Tutorial Creation Workshops**—November 6, 2009 Dominican University  
November 13, 2009 Chicago State University  
The I-Share Instruction team responded to widespread interest in the previous hands-on tutorial workshops by repeating them in the fall of 2009. Each workshop was limited to fifteen people. As before, there was an overview of best practices, examples of effective online tutorials, and an introduction to Wink--the free, open-source software used to create them. However, this time participants were divided into groups of three and were asked to write down the steps of a simple search in universal borrowing, which would become the content for a group tutorial. Then using their own samples, the groups practiced scriptwriting and storyboarding with the help of team members. In the afternoon, Aimee Walker gave a nuts-and-bolts demo of Wink through to completion of a tutorial with enough pacing so that everyone could repeat the steps. Afterwards participants were able to practice screencasting with assistance from the Team. At the Chicago State workshop, staff from the CARLI office attended, participated, and gave useful feedback. Evaluation results in general were quite positive and noted the friendliness of the Team, the practical tips, and the useful handouts. There is a plan to repeat the workshops each fall at different libraries statewide. A follow-up questionnaire indicated that some participants had successfully created and mounted Wink tutorials at their own institutions and some had also trained other library staff in using Wink.
- **Information Literacy Summit Presentations**  
Laura Burt, Marisa Walstrum, Kenneth Orenic and Aimee Walker followed up on their work together on the I-Share Instruction Team by creating the presentation, *Tutorials for Everyday Information Literacy*, which was given in the spring of 2010 at both Moraine Valley Community College and Illinois State University. They spoke about best practices and how various institutions in Illinois use tutorials in day-to-day interactions with their patrons. A

full description and further information can be found on the wiki the group created at <http://everydayiltutorials.pbworks.com/>.

- **Mobilizing Your Library Forum—June 18, 2010**

The team has organized a forum about mobile libraries and instruction, which will be held at National-Louis University, Lisle campus. The day will begin with the presentation: Anytime, Anywhere, Any Device: Developing a Mobile Website for Your Library. DePaul University Librarians: Courtney Greene (Instruction and Online Learning Librarian); Missy Roser (Reference and Instruction Librarian); and Beth Ruane (Outreach and Reference Services Librarian) will repeat the hands-on workshop they gave at an ALA Mid-winter preconference. Three breakout sessions that address mobile technology in library instruction will follow. Illinois State University librarians Bruce Stoffel, (Reference Coordinator) and Julie Murphy (Science Online Resources Librarian) will present a session on IM reference, Jing videos and iPod library tours. Another session by Pamela Salela (U. of Illinois Springfield) will focus on the embedded librarian and vodcasts. Jim Hahn, (First-year Experience Librarian) at the University of Illinois Urbana-Champaign will present on using library orientation apps for instruction. There will be room for 80 participants.

### **Future Objectives**

- I-Share Instruction Team is planning to hold more workshops in the next fiscal year.

### **I-Share OPAC Team**

*Amanda Pippitt, Millikin University, Chair*

### **Accomplishments**

- Decided on what fields would display in the Tomcat brief and detail views.
- Prioritized enhancements and re-customizations (such as “text me the call number”) for Tomcat. Also decided which team improvement ideas would have to be confirmed through usability testing before enacting.
- Documented how to create URL-launched searches in WV7:  
[http://www.carli.illinois.edu/mem-prod/I-Share/opac/webvoy\\_url\\_builder\\_wv7.html](http://www.carli.illinois.edu/mem-prod/I-Share/opac/webvoy_url_builder_wv7.html)
- One team member’s institution (Millikin University) used Tomcat as its default catalog starting in the spring semester in order to monitor possible problems and keep abreast of possible areas of improvement/enhancement should CARLI redeploy WV7 as its main consortial OPAC option.
- Changed wording on post-search filter options in Tomcat to be more user-friendly and less redundant.
- Considered other libraries’ changes/enhancements to Tomcat (such as University of Rochester) for possible use should CARLI redeploy WV7 as its main consortial OPAC.
- Worked with IUG & CARLI to formulate a call for volunteers for a usability testing group.
- Generated a list of OPAC-related usability testing questions and disseminated the list to the Usability Testing Volunteer Group (UTVG) listserv.
- Created new resources page/background reading list for UTVG:  
<http://www.carli.illinois.edu/comms/iug/iug-utvg/use-res.html>

- Polled the UTVG for interest in a webinar on usability testing basics, worked with volunteer speakers Robert Slater and Jenny Emanuel (both of UIUC) to develop and organize the webinar, and in April, offered two identical 1-hour webinars to I-Share members titled “Usability Testing: A Brief Introduction for the Novice.”
- VuFind changes: “holdings” tab renamed “location,” “description” tab renamed “more details,” description tab contents increased to match the Tomcat brief view, “staff view” tab moved from its own tab to small link at top of screen, 610, 611 & 630 fields now display in the top display area under the label “topics,” plus many other decisions on minor display issues in the “more details” tab, hyperlinked tracings functionality, and analytics.
- Reviewed and made suggestions to improve VuFind General FAQ and Login FAQ.

### **Future Objectives**

- How to make the transition between local to I-Share catalog in VuFind smoother.
- How to make tagging useful in VuFind. When and why do patrons use tagging options?
- Local library customization possibilities for VuFind.
- Consideration of use of Adobe Connect and VOIP rather than conference calls for team meetings in light of budget considerations.
- VuFind Wikipedia and authority control.
- Functionality of VuFind “Cite This” feature and making VF more compatible with Zotero.
- Possible VuFind enhancements, such as incorporating reviews from Amazon.com and book cover images from sources such as Open Library.
- Relevancy ranked searches. What works best and should we mess around with the field weighting?
- Disseminating mobile catalog beta developed by UIUC to other I-Share institutions. UIUC and Millikin are currently working together to test functionality.
- How to energize and mobilize the UTVG? No one is posting to the listserv or reporting on any usability testing they are doing.
- Continue discussion of future ILS.
- Keeping an eye on XC developments and how they might affect CARLI.

### **I-Share Resource Sharing Team**

*Dallas Long, Illinois State University, Chair*

### **Accomplishments**

- Recommended a “best practices” for standard language and contact information for libraries that send out courtesy notices to patrons.
- Recommended a “\$4.99 or Less” report to identify UB patrons with outstanding fines of \$4.99 or less that can be waived at libraries’ discretion. The report is currently running on a monthly basis, beginning in April 2010.
- Created a wiki for I-Share libraries where members can post reviews of equipment used at their libraries, such as barcode scanners, receipt printers, document scanners, etc.
- “Back to Basics and Looking Forward” was the theme of the Fall Forum, held on October 15<sup>th</sup> 2009 at Governors State University. The forum included seven presentations



representing “best practices: Blocking/Unblocking/Suspending Patrons; Callslip Processing; Customizing Notices; Customizing Ini Files; Patron Record Management; Contacting CARLI for Support; and Future of the ILS. We had 70 registrants for the Fall Forum.

**Future Objectives**

- Planning for Fall Forum 2010 with a possible theme of analyzing return rates by patron group and what return rates mean for overdue and courtesy notices.

*Respectfully submitted,*

Jason R Rossi, Chair-Elect, I-Share Users’ Group

June 14, 2010