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CARLI News August 13, 2010

Consortium of Academic and Research Libraries in Illinois

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CARLI News

August 13, 2010

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CARLI Digital Commons Institutional Repository

CARLI is close to launching the CARLI Institutional Repository, built on the Digital Commons service from Berkeley Electronic Press. We expect to begin adding documents and making them publically available in the next few weeks. Digitalcommons@carli, www.digitalcommons.carli.illinois.edu, will provide a more convenient and easily searchable repository for consortial documents, committee records and other materials. The CARLI repository will also serve as the portal and a starting point where scholars will be able to browse and search across all of the academic institutions in Illinois that utilize the Digital Commons service, currently:

College of DuPage, Depaul University, Illinois Math and Science Academy, Illinois Wesleyan University, National Louis University, Olivet Nazarene University, Parkland College, and Southern Illinois University Carbondale.

Consortia Discount for Digital Commons Service for CARLI Members

CARLI and Berkeley Electronic Press are pleased to announce that CARLI members will now be eligible for a 10% discount on their Digital Commons institutional repository license. For more information about this offer please contact [Dave Stout](#), Sales Director, Digital Commons.

Introducing "CARLI Collections"

CARLI members have a new option for managing a small and limited set of collections within DigitalCommons@carli. CARLI has negotiated a special arrangement with Berkeley Electronic Press to allow interested CARLI libraries to have a single community within the CARLI Digital Commons site, along with up to five series within their community. While the CARLI collections option is not comparable to a full Digital Commons license, it will provide CARLI member libraries the option to get started.

Licensing and invoicing for CARLI members' Digital Commons communities will be handled by Berkeley Electronic Press. For more information about this offer, or if you would like to participate, please contact [Dave Stout](#), Sales Director, Digital Commons.

Save the Date—Collections Management in the Digital Age

Mark your calendars to join your library colleagues at this daylong forum on Thursday, October 28, 10 a.m.-2 p.m., at Southern Illinois University Carbondale. The forum will be a valuable opportunity to hear from representatives from JSTOR, a key library vendor providing reliable and high-quality electronic access and archiving service to libraries, and Ithaka S+R, a library strategic consulting group who will report on its analysis of changing expectations by faculty of libraries resources and services.

Sessions will focus on faculty attitudes and perspectives, new tools for librarians and faculty including usage statistics and trends, JSTOR content development, and a discussion of what to withdraw from print collections in an increasingly digital world. Presenters include: Michael Spinella, Executive Vice-President, Ithaka and Managing Director, JSTOR; Jason Phillips, JSTOR Director of Outreach; and Ross Housewright, Ithaka S+R Research Analyst.

There is no charge to attend this event. A buffet lunch will be provided. Attendance at the forum is open to all library staff in Illinois and the surrounding areas. Registration information and the final agenda for the forum will be announced soon.

This event is co-sponsored by CARLI, Southern Illinois University Carbondale, and Ithaka/JSTOR.

Video Digitization Best Practices Now Available

Over the past year, the Standards Subcommittee of the CARLI Digital Collections Users' Group (DCUG) has been working hard on a new "best practices" document, "[Guidelines for the Creation of Digital Collections: Digitization Best Practices for Moving Images.](#)"

Don't forget to check out the other best practices documents created by DCUG:

- [Guidelines for the Creation of Digital Collections: Digitization Best Practices for Audio](#)
- [Guidelines for the Creation of Digital Collections: Digitization Best Practices for Images and Text](#)
- [Guidelines for the Creation of Digital Collections: Best Practices for Descriptive Metadata](#)

E-Resources

E-Resources Interest Survey Available Until August 31

CARLI is conducting a [survey](#) to gauge the level of member interest in several new e-resource products. Your participation will help us determine which products meet the minimum level of interest required (generally at least 5 libraries) before we may decide whether to begin the process of negotiating an agreement. Your feedback is also useful in working with vendors to ensure we have the lowest price possible.

New e-resource products included in this interest survey are:

- [NoveList](#)
- [NoveList Plus](#)
- [Mango Languages](#)
- [Tell Me More](#)
- [ACM Digital Library](#)
- [Journal of Visual Experimentation \(JoVE\)](#)
- [Palgrave Statesman's Yearbook Online](#)
- [Palgrave Connect](#)
- [Palgrave Dictionary of Economics Online](#)
- [Palgrave World Higher Education Database Online](#)
- [Oxford Scholarship Online](#)
- [Oxford 2010 Current Journals Collection](#)
- [Oxford 2010 Journal Archive Collection](#)

The [survey](#) will be open until August 31. After the survey closes CARLI staff and the E-Resources Working Group will assess the level of interest and the potential for cost savings to determine whether entering into negotiations for a CARLI agreement would be beneficial.

Contact support@carli.illinois.edu with any questions or to receive a copy of the confidential pricing and product trial access information that was sent to the CCG and E-Resource Contacts email lists in early August.

Selection System Enhancement—Current License Agreements

We are happy to announce an important new enhancement to the password-protected CARLI e-resources selection system. In the enhanced system, all database names that appear in the selection system are now linked to the appropriate redacted license agreement. To utilize this feature, log in to the [selection database](#) with your user name and password. You may view the databases you currently subscribe to OR the selections by vendor/database lists. You do not have to be a current participant to view the license, which will allow you to study license agreements for databases under consideration by your library.

We hope that this enhancement will make it easier for you to quickly locate the correct license and to view use terms or other information about the license agreements.

Please note that all CARLI license agreements are confidential and should not be shared with anyone outside of your library.

Future enhancements planned for the selection system include updating pages on the CARLI website that list [periods of performance](#) and [terms of use](#). Watch for those enhancements later this fall.

As always, if you have questions or need information about any of our license agreements or any other aspects of the e-resources brokering program please send a note to support@carli.illinois.edu.

Incoming Manifests Now Available from the ILDS Website

ILDS participants are now able to print a copy of their incoming manifest directly from the LDS website, listing the bags their location is receiving on any given day. ILDS sites are no longer receiving paper copies from their Lanter Delivery Systems driver. Detailed instructions document how to use this new feature of the ILDS label system to generate incoming manifests are available from the [ILDS website](#). Please make sure that the appropriate staff in your library are aware of this change.

Please note that there are some occasions when a delivery bag may not show up on your incoming manifest. The most common reason for this is that the barcode on the printed label could not be scanned. The causes include a barcode that is printed too lightly, a part of the

barcode is missing, and other printer problems that result in defective barcodes. While we try to make the manifests as correct and complete as possible, the main goal of ILDS is to get materials to you as quickly and safely as possible. As long as the eye-readable address is legible, the bag will make it to its destination, but we do encourage you to provide an adequate printer and to monitor the quality of the labels being produced.

CARLI staff are addressing some technical issues related to this change. For the most current information regarding any known issues with the ILDS system, visit the [CARLI Systems Status page](#). Please continue to send your questions, comments, and suggestions to support@carli.illinois.edu.

I-Share

I-Share Standardized Universal Borrowing Policies Effective August 4, 2010

On August 4, 2010, CARLI implemented changes to standardize the policies that apply to I-Share Universal Borrowing (UB) activity. "Universal Borrowing" is the Voyager module that supports interlibrary resource sharing among the 76 I-Share libraries. Any time an I-Share library patron requests or borrows an item from an I-Share library other than their "home" library, Universal Borrowing policies are invoked.

The common policies that have been implemented provide all UB-eligible borrowers a standard 4-week UB loan period for the items that I-Share libraries make available through UB. Up to three 4-week renewals are allowed unless a UB item is recalled or considered lost. UB overdue notices will be generated on a common schedule and will include a "courtesy" notice sent to the patron 7 days in advance of a due date to encourage their prompt attention to these materials. The standard policies also include a common 29-day timeframe for overdue UB items to be considered lost.

The concept of consortium-wide standard policies for resource sharing is not new. Many large consortia, including OhioLINK, Orbis/Cascade, and Georgia's GIL (GALILEO Interconnected Libraries) have operated under common policies for years. CARLI's resource sharing program predates these programs and its tradition of the home library's policies prevailing was established, in part, due to some of the limitations of the consortium's first shared system, LCS, which began supporting consortial resource sharing in 1980. The CARLI consortium has been working towards this goal for the past several years under a project coordinated by the Board's Resource Sharing Task Force, whose vision statement has been: Maximum Access/Minimum Barriers.

CARLI has not implemented any automatic UB blocks at this time. Automatic blocks are intended to suspend the UB privileges of patrons when they reach certain thresholds such as having a set number of UB items overdue or lost. The original specification for this project included six different automatic UB blocking conditions, but shortly before implementation, library staff who were reviewing "block preview" reports prepared by CARLI, reported some patrons being inappropriately identified as having reached a blocking threshold. CARLI staff are actively investigating this problem. Ex Libris fixed a different problem with similar symptoms more than a year ago. The current problem has the same effect of incorrectly blocking valid patrons, but the new problem appears to be intermittent and we have not yet determined what events trigger it. Library staff may continue to block patrons manually as needed until automatic blocks can be safely deployed. CARLI has a "[Best Practices](#)" document on using patron blocks in I-Share available on our website.

The UB setting changes were made through a batch process by CARLI Office staff and were implemented for all I-Share libraries simultaneously on August 4. Policies relating to local circulation, that is, a library circulating its own items to its own patrons, were not changed and are still set as the library determines.

The UB policy changes are summarized in full in a new [Appendix A to the I-Share Library Resource Sharing Code](#), which is also available on the CARLI website .

[Read the detailed memo](#) documenting these changes, the background for the new policies, and links to other related resources.

We extend our thanks to all who participate in I-Share resource sharing. Thanks also to all who served on the Resource Sharing Task Force and to those who have served on other CARLI bodies that have contributed to the planning for this change. The new policies will, along with the improved delivery service, provide consistent, predictable resource sharing services among the 76 I-Share libraries, helping to provide our library patrons Maximum Access and Minimum Barriers.

As always, please contact the CARLI Office with any questions or problem reports by sending email to support@carli.illinois.edu.

"Request First Available" Feature Added to VuFind I-Share Union Catalog

CARLI is pleased to announce that a "request first available" feature has been added to the VuFind interface to the I-Share union catalog.

What's New:

- In addition to the "Request This Item" link on the Location tab of the Record page, users will see a new "Request 1st Available" tab to the left of the Location tab.
- VuFind will select an available copy at random, with one exception: if the user's home library has an available copy and if the user's home library supports Call Slip requests, VuFind will prefer the user's home library to fill the request.

What's Still True:

- When users select a title from the Results page in I-Share they'll be taken to the Location tab of the Record page by default.
- On the Location tab of the Record page users may still click the "Request This Item" link that appears immediately below any available copy of the title.
- If the user is already logged in, the user's home library's available holdings (if any) will float to the top of the display. Other libraries'

holdings will display in random order.

- "Back office" procedures for Universal Borrowing and Call Slip, including Request Promotion, remain unchanged. If the user successfully places a request for an item but, for some reason, the owning library cannot fill the request, library staff can unfill the request and the request will promote to another I-Share library with an available copy.

Please contact support@carli.illinois.edu with any questions or problems.

Cataloging E-Resources Display in the OPAC Task Force Final Report

The Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009) is pleased to release its [Final Report](#) to the I-Share library community.

This report will be of interest to I-Share library staff members who are involved with the cataloging of electronic resources, the batch loading of sets of bibliographic records for electronic resources, or the display of and access to electronic resources in the public catalog.

In 2009, the I-Share Users' Group (IUG) established the third iteration of the Cataloging Electronic Resources/Electronic Resources Display in the OPAC (CatER) Task Force to:

- Document needed changes to the 2004 CatER Report and provide additional recommendations as appropriate;
- Identify current best practices and additional issues related to the cataloging of, access to, and display of electronic resources in I-Share's consortial environment;
- Identify related issues concerning access to electronic resources that are outside of this charge and make recommendations to the IUG for additional action.

The Task Force researched and documented changes to electronic resources cataloging guidelines and standards at the national level, and surveyed I-Share libraries' cataloging practices at the local level. Using the evidence gathered, the Task Force revised and expanded upon the existing recommendations for the cataloging and display of electronic resources.

The final report was approved by the I-Share Users' Group on July 14, 2010 and the I-Share Users' Group Cataloging and Authority Control Team on July 30, 2010.

CatER Task Force (2009) members are Kristin E. Martin, Chair (University of Illinois at Chicago); Judith Dzierba (Rush University); Lynette Fields (Southern Illinois University Edwardsville); Andrea Imre (Southern Illinois University Carbondale); Sandy Roe (Illinois State University); Tammy Schnell (Lincoln Land Community College); Xiao (Helen) Zhou (University of Illinois at Urbana-Champaign); Jessica Gibson, CARLI Staff Liaison.

If you have any questions, please contact the CARLI Office at support@carli.illinois.edu.

FY 2010 Consortial Statistics Now Available

The [I-Share consortial statistics for FY2010](#) have been posted to the CARLI website.

The consortial stats include:

- Collection Stat 8: Database Record Count
- Collection Stat 9: Unique Titles Report
- UB Stat 1 - Outgoing ILL [Lending]
- UB Stat 2 - Incoming ILL [Borrowing]
- Borrowing and Lending Comparison FY2010

Details and descriptions of each report can be found in the document "[Annual Voyager Statistics Package](#)."

Preservation Tip: With a Little Help from My Friends...

Collections care and preservation costs for library materials can add up fast, and with library budgets growing tighter each year, it becomes difficult to figure out how to pay for necessary repairs, restoration, or conservation for damaged, but valuable or difficult to replace library materials.

Have you ever considered asking your Friends? In your Friends of the Library group, you have a ready-made collective of people who care about the library and its materials, and who want to improve the libraries for everyone. One of the best ways to do that is to care for the collections the library already has!

Don't have a Friends group? Have you ever considered instituting one, as a way to build connections, library donor base, and, occasionally host fun events that remind people why they love their library? The Association of Library Trustees, Advocates, Friends and Foundations (ALTAFF), a division of the American Library Association, has lots of resources on [how and why to start a Friends group in support of your library](#), as well as ways to reinvigorate your existing Friends groups.

While most Friends of the Library groups tend to focus on acquisitions for the library, preservation and conservation of those materials already held by the library should also be considered as viable options. Check the by-laws of your Friends group to see if conservation is an allowable use of funds. If it's not, then you have a great opportunity to educate your Friends about one of the aspects of libraries about which we are often too quiet, and to update your Friends group's bylaws accordingly. The [ALTAFF website](#) has model bylaws, operating agreements, and other organizational tools available as well.

Similar to "adopt-a-book" programs for purchases, why not have donors or Friends "adopt" books already held by the library in need of

Similar to adopt-a-book programs for patrons, why not have donors or friends adopt books already held by the library, in need of repair? Donors can choose to repair or conserve items that mean a lot to them, based upon favorite authors, or beloved titles or subject areas. Perhaps that collector of children's books on your Friends Board would like to help repair historical children's books held in your collections; you never know until you ask!

Friends of the Library or library-wide newsletters are great ways to promote donor-funded preservation and conservation work. Your library's website, blog, or social media profiles (Facebook, Twitter, etc.) also provide great venues. Publishing "before," "during," and "after" pictures of conservation work can educate your patrons and donors in what is involved in bringing these materials back to life, fostering a visceral connection with the books, along with recognizing generous donors to encourage additional generosity.

Sometimes, you just need to ask your Friends to get the help that you need.

Other Library News

Call for Participants—IMLS Grant for Preservation and Institutional Repository Pilot Project

Northern Illinois University is exploring the possibility of applying for an IMLS National Leadership grant to launch a statewide pilot project for a comprehensive digital preservation and institutional repository solution for interested CARLI libraries.

This is an open call for potential partners for that grant application.

This pilot project, which will entail collaboration between NIU and 4-5 additional CARLI institutions of different sizes, will investigate open-source models for a statewide digital preservation system, from distributed dark archiving through migration and institutional repositories. The pilot will focus on creating a scalable, interoperable, collaborative, sustainable statewide digital preservation system that could serve as a national model.

Institutions participating in the grant application process will be required to provide substantive cost-share as part of the grant program, in accordance with IMLS guidelines.

Representatives from CARLI member libraries interested in this pilot project are invited to attend an informational meeting on August 27, 10 a.m.-2 p.m., at the CARLI Office in Champaign.

Those interested in attending this informational meeting should RSVP by August 24 to [Elizabeth Clarage](#).

Educational Strategies For Serving Hispanic Students Symposium

Register now to attend the free Raising Expectations Symposium "[Educational Strategies For Serving Hispanic Students](#)" to be held on August 19 at Morton College, Cicero, Illinois.

There is no fee for attendance. For information about the day's agenda, visit the [syposium website](#).

2010 Access Services Conference

Register by October 1 to attend the 2010 [Access Services Conference](#) in Atlanta, GA, November 10-12. The 2010 Access Services Conference is an opportunity for individuals working in all areas of Access Services in academic libraries to gather information and communicate with other professionals about Circulation, Reserves, Interlibrary Loan, Student Worker Management, Security, and other topics of interest.

For more information, to register, or to view the presentation abstracts, visit the [conference website](#).

Kathleen Kern Receives RUSA 'My Favorite Martian Award'

Kathleen Kern associate reference librarian and associate professor of library administration at the University of Illinois at Urbana-Champaign Library, is the 2010 recipient of the MARS: Emerging Technologies in Reference Section Recognition Certificate, also known as the "My Favorite Martian Award."

MARS is a section of the Reference and User Services Association (RUSA), a division of the American Library Association (ALA), and administers the award. It is given to an individual to recognize excellence in service to MARS.

The full announcement is available on the [ALA website](#).

Upcoming CARLI Events and Meetings

Forums, Workshops and Training

August 18 SFX Interest Group Webinar
August 19 SFX Interest Group Webinar

September 15 SFX Interest Group Webinar
September 16 SFX Interest Group Webinar
September 21 I-Share Cataloging and Authority Control Team Forum Webinars

October 20 SFX Interest Group Webinar
October 21 SFX Interest Group Webinar
October 25 I-Share Cataloging and Authority Control Team Fall Forum/MarcEdit Workshop, Chicago State University

October 26 Cataloging and Authority Control Team Fall Forum/MarcEdit Workshop, Illinois State University, Normal

Meetings

August 17 I-Share Acquisitions and Serials Team, CARLI Office

August 17 I-Share Instruction Team, CARLI Office

August 18 Digital Collections User Group

August 19 I-Share Resource Sharing Team

August 25 Public Services Working Group, CARLI Office

August 30 Preservation Working Group, CARLI Office

September 7 I-Share Cataloging and Authority Control Team

September 8 CARLI Executive Committee

September 13 E-Resources Working Group, Illinois State University, Normal

September 15 Digital Collections Users' Group

September 17 CARLI Board, CARLI Office

October 5 I-Share Cataloging and Authority Control Team

October 15 I-Share Users' Group, CARLI Office

October 20 Digital Collections Users' Group

For meeting times and locations or for additional information about upcoming CARLI forums, trainings, and meetings, consult the [CARLI calendar](#).

Contact Us

All questions and comments about the e-newsletter should be directed to support@carli.illinois.edu. [Subscribe](#) to CARLI email lists to receive the latest news on topics of interest to you.