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I-Share Users' Group Minutes for November 19, 2010

Consortium of Academic and Research Libraries in Illinois

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I-Share Users' Group Meeting Minutes

Friday, November 19, 2010, 10:00am-2:00pm

1000 Trade Centre Drive, CARLI Office Suite 303,
Training Room 340,
Champaign, IL 61820

Present: Mary Burkee, Howard Carter, Belinda Cheek, Sandy Craig, Cindy Fuller, Tom Goetz, Nancy Laverdiere, Carlos Melian, Karen Whisler

Absent: Mary Case, Jason Rossi

CARLI Staff present: Lorna Engels, Kris Hammerstrand, Cathy Salika, Paige Weston

The minutes of the October 15 conference call meeting were approved.

Tom Goetz was elected chair-elect for 2011-2012.

CARLI Staff updates

- Susan Singleton is continuing to hold regional directors meetings. These are information gathering sessions with library directors in advance of the CARLI Annual Meeting webinar on December 3.
- CARLI Board met in September and will meet again on December 10. September minutes are on the CARLI web site.
- Hammerstrand began a discussion of the new standardized UB loan policies (see below).
- Hammerstrand presented an update on the upgrade to Voyager 7.2.3 (see below)

Liaison reports from IUG functional teams

- Acquisitions and Serials
 - The Team last met on November 19, 2010
 - Webinars on complex publication patterns were successful.
 - Team members are continuing to work on the Acq/Serials wiki.
 - Acq/Serials open houses are being planned for spring 2011
 - Another member has resigned so there are currently two vacancies on the team. There was a brief discussion on the process for refilling team vacancies. Seats on CARLI committees, working groups and teams are not guaranteed by institution. CARLI staff will work on recruiting new members for the Acq/Serials Team.
 - Next team meeting on December 1, 2010.
- Catalog and Authority Control
 - The Team last met on November 2, 2010.
 - The Team continued to discuss and plan their spring forum scheduled for May 17, 2011 at University of Illinois at Springfield.
 - Discussion on RDA implementation. Creating a survey on RDA implementation and what ICAT can do to help member libraries with RDA.
 - There was also a discussion on Casey Sutherland's email of November 18, 2010 regarding the

addition of 049 \$o SKIP in an OCLC update or produce transaction.

- The next meeting is scheduled for the 2nd week in December.
- Instruction
 - The Team reviewed the recent workshops on creating online tutorials that were held at CARLI office, Champaign and Dominican University.
 - Created a survey on additional workshops/forums.
 - Contributing shared tutorials are being added to the CARLI blog.
- OPAC
 - The Team last met on November 10, 2010.
 - VuFind is continued to be reviewed and possible changes discussed.
- Resource Sharing
 - The Team last met on November 11, 2010.
 - The Team reviewed the feedback on the on October 20 Fall Forum. Forty four evaluations were received. There was interest in Cathy Salika's reports session and the history of I-Share resource sharing presented by Kris Hammerstrand. As a result of additional feedback the spring forum will concentrate on student tasks and training. The forum is planned for late February/early March 2011.
 - Circulation tips and tricks will be created and put on CARLI blog.

Discussion Items

Standardized UB loan periods

- Kris Hammerstrand reported that the CARLI Board will review standardized UB loan periods at the end of the fiscal year. IUG and Resource Sharing should also review them in the coming months as well.
- Based on some of the discussion at the recent Resource Sharing forum there seems to be some lingering misinformation about previous UB loan policies. Some libraries are still receiving complaints based on the current perception of "reduced" loan periods.
- IUG will hold discussion on standardized UB loan policies at each meeting.
- Burkee recommended more lead time as changes are made in the near future.
- Salika reported the problem related to patron blocks and UB loans has been resolved in Voyager 7.2.3.
- An amnesty period when blocks are implemented was discussed and will be considered when Voyager is upgraded.
- IUG members will talk with the circulation staffs in their libraries to get more information on patron feedback regarding UB loan periods.
- Salika will generate reports to help identify issues related to the standardized loan periods. Some possible reports are the number of "3 quick renewals", an increase in renewals, the length of time items are on hold shelf and how many items expire on the hold shelf.

Fines and fees

- IUG discussed possible changes to the minimum fine for UB loans. Currently it is at \$4.99 and there was some concern that this is too low as an incentive to return items and as cost recovery for libraries

collecting money.

- The group acknowledged that collection of fines impacted libraries in different ways. Examples of fines collected at public universities, private institutions and community colleges were discussed.
- Some options for future discussion were increasing the minimum fine, removing fines for returned items, patron blocks. IUG will continue to discuss fines and fees for a possible recommendation in the future.

Voyager upgrade

- Additional problems with 7.2.3 have been discovered the upgrade may be postponed until a later date.
- Upgrading to 7.2.3 would require two full days of down time. Patches that were put in place in the current version of Voyager have not resolved all performance issues related to Tomcat, and only 1 of those is in 7.2.3. Only 3 libraries are currently running Tomcat and they are reporting problems.
- Another option that is being discussed is to skip the upgrade to 7.2.3 and upgrade to 8.0 in summer 2011. If so, field testing of 8.x will take place in March-May/June. CARLI staff hope to be participating in field testing.
- The Ex Libris timeline for Voyager development is relatively unchanged:
 - 8.0 June 2011
 - 8.1 late 2011
 - 8.2 2012
 - 9.0 late 2012

Ex Libris URM and Next Gen Library Catalogs URM Discussion

- IUG members reviewed the Ex Libris presentations on the URM and reported their observations.
- A recommendation was made to view the Fulfillment presentation with Resource Sharing.
- Based on the extended discussion of UB loan periods and fines and the URM functionality related to fulfillment, Resource Sharing will be asked to join the next IUG meeting in February. Date will be set for February 4 with a snow date of February 10.

Future agenda items

- Mid-year report to the Board
- Possible IUG action on CatER recommendations

The meeting was adjourned at 1:40 p.m.

Respectfully submitted,
Carlos Melian