4-15-2011

I-Share Users Group Minutes for April 15, 2011

Consortium of Academic and Research Libraries in Illinois

I-Share Users Group Meeting Minutes

April 15, 2011

Conference Call

217-244-9054 and (toll free) 866-951-9521

Members Attending: Tom Goetz, Chair; Mary Burkee; Howard Carter; Belinda Cheek; Cindy Fuller; Nancy Laverdiere; Carlos Melian; Karen Whisler.

Members Absent: Mary Case; Sandy Craig.

CARLI Staff Attending: Susan Singleton; Kris Hammerstrand; Lorna Engels, Cathy Salika.

Kris thanked Tom Goetz for taking over as IUG chair.

Minutes for Feb. 10 meeting were approved as amended.

CARLI Staff Update

Susan:

- Google Analytics (GA) has been installed on the CONTENTdm Digital Collections page and the CARLI web site. Discussed putting it on the catalog but there is no way to exclude circulation data, so Google would have patron information. [Carlos is interested in E-Reserves stats and has installed GA on footer of catalog pages.] CARLI will not make a policy to prohibit libraries from putting GA on catalog but CARLI will not do it.
- Cost-share of the Oxford English Dictionary (OED) and SFX will begin on July 1. The actual costs will be sent to libraries. OED will be available through the Selection System which opens on April 15, and purchase will include cost-share.
- CARLI has been accepted as a joint affiliate member of the 5 Colleges repository. They collect from JSTOR, Project Muse, APA, and several other publishers. The goal is to provide an insurance policy/back up if libraries want to get rid of print volumes. The 5 Colleges repository is an open depository and will provide digital or print copies of journals on request to members. CARLI members who are removing print volumes will receive a list of the repository's needs to possibly fill in the gaps in the collection. This will be a renewable 3-year contract which will provide membership to all CARLI members for $15K. [Carlos asked how do we request items?] Requests are made through OCLC. The contract process has been slowed by the Illinois State procurement regulations, but should be signed soon. [Carlos asked if IUG should review our "last copy" policies.] This repository is for journals not monographs, but the Collections Working Group should review our policies.
- CARLI received a $100K grant from the Mellon Foundation for an additional developer at Rochester to expand XC to make it work with UB.
- Lanter Delivery Systems won a new contract to begin in July when the current contract expires. There should be minimal disruption. CARLI would like any feedback on delivery service issues before that date so they can pass those on to Lanter.
- VUFind mobile interface has been released for the online catalog. The interface for the Universal Catalog

is still being worked on.

- Discovery Solutions get their patron, circulation status, and bibliographic data from CARLI and go through VUFind to fill requests. It is the vendor's responsibility to make the connection to the circulation module or UB, not CARLI's.
- The E-Resources Working Group will have webinars on licensing issues. The first webinar will be April 19 and will be recorded.
- The CARLI Board has authorized $70K for patron-driven acquisitions for print materials through YBP. This "on-going trial" will begin early in FY12, probably August. It will run until the money runs out. CARLI wants to create models for libraries to contribute. [Carlos asked how the system will be evaluated?] The pilot provided many answers. UIUC created a workflow model that insured a 48-hour turnaround time for requests, so they were transparent to the requester. The system will focus on Humanities and Social Science titles, which are the most requested and most likely to be used. Statistics from the pilot show that 70% of items requested by patrons are checked out once, and 40% twice. Of the items UIUC purchased through their usual system only 5% circulated.
- Purchase on demand of e-books is being looked at but there is no easy way to do this. Items cannot be shared easily or at all. CARLI plans an RFP to challenge e-book aggregators to come up with pricing models to make it possible for consortia to share e-books. CARLI will not be able to fund this effort and libraries will have to carry the financial load. [Carlos stated that EBL has a rental model in place at Providence College.] There are several interesting models for individual libraries but not for consortia.
- The CARLI Board approved the IUG recommendations for changes to the circulation policies without dissent.
- The Tomcat interface to Voyager will disappear on July 1 and will no longer be supported by CARLI.
- CARLI is participating in the Voyager 8 field test. Voyager 8 is a major upgrade and will not be released until July. Because of the timing and the complexity of the Voyager8 release, CARLI will upgrade to Voyager 7.2.x (3, 4, or 5), instead. The upgrade to 7.2 or higher is critical for the XC project because it includes WebVoyage web extensions. The target date for the upgrade is the weekend of July 8. New clients will need to be installed for this upgrade. Update Checker for Windows 7 is available.
- Functionality that is available in WebVoyage but not in VUFind is still being worked on. Location limits are a high priority and CARLI is working on it but there is still no date for it to be resolved. [Karen asked about left-anchored searching.] It is not quite "dead" yet, but it doesn't work.

Kris

- UB policy changes have been approved. There will be email announcements from CARLI as well as information on the web site. CARLI staff will make the necessary changes. Since patron blocking will be possible with the Voyager 7.2.x upgrade, the standardized policies for UB blocks and removal of fines should be coordinated. IUG and the Resource Sharing Team should discuss how to do this. CARLI will reconsider the implementation timing.

Business Reports

Resource Sharing Team

- Howard reported that the Resource Sharing Team met on April 14 by conference call. Mel gave some details of the Voyager 8 field test, and cautioned the Team about confidentiality issues.
- The Spring Webinar was a great success. There were 95 participants and 29 evaluations were turned in

(up from 10 evaluations last year). Attendees loved the handout materials, saying they were very helpful and were a pattern for others to follow. There were a few technical glitches but nothing serious. A recording of the webinar will be posted when audio issues are resolved.

- The Team was given tasks related to e-book lending and standardization of lost property fees. The Team is unclear about how to proceed. Susan was going to present these questions to the Board, so the Team is standing by for more guidance.
- There will be no meeting on May 13. The annual report will be ready for the May 20 IUG meeting. The next meeting will be June 9.

Acquisitions Team

- Karen reported that the Team has been working on their wiki and Wink tutorials. They are conducting a series of open houses across the state. Two have been done. The next one is at SIUC on April 20, then at Wheaton on May 12. The next meeting will be on April 27.

Instruction Team

- Tom issued a "save-the-date" announcement for the Spring Forum on June 10 at Heartland College. The topic is "Collaboration and Imbedded Librarians." Since he has assumed the chair of IUG, we will need a new Instruction Team liaison. There is one remaining meeting on May 10 to write the annual report, so Tom will continue as liaison until the end of the year.

ICAT Team

- Mary reported that the ICAT Forum would be held on May 17 at UI-Springfield.

OPAC Team

- Belinda reported that the OPAC Team met in March but not in April. There has been some confusion with labeling in VUFind. People have been using Favorites to request items. The Comments box has been relabeled "User Reviews" The Reviews box is now "Publisher Reviews".

Mid-Year Report to the Board

It was decided that the UB policy change recommendations that were sent to the Board were sufficient to serve as a Mid-Year Report.

IUG Action on CatER Recommendations

CatER Recommendations (page 23-25 of the CatER Final Report)

- R-19: This item will be referred to the OPAC Team.
- R-20: Link checking is not a priority. This item is gone.
- R-21: This item will be referred to ICAT.
- R-22: This item will be referred to ICAT.
- R-23: This item has been completed.
- R-24: This item has been referred to the CARLI staff. Ongoing.
- R-25: This recommendation has been adopted.

- R-26: This item is ongoing.
- R-27: This item will be referred to the CARLI staff to investigate. There is no deadline from IUG.
- R-28: This item will be referred to the OPAC Team

Carlos will summarize these results and communicate them to the CatER Task Force. Referrals will be sent to the chairs of the OPAC and ICAT Teams and CatER

New Business

Patron Driven Acquisition: see above.

Communication Process for the New UB Loan Periods: This should come from CARLI soon so libraries can prepare for the changes.

Next Meeting

Next meeting will be May 20 at the CARLI Offices. Team chairs and chair-elects will be invited. Tom will send invitations and remind the chairs that their annual reports are due by May 16 to Lorna so they may be distributed at the meeting.

Adjournment