

5-20-2011

I-Share Users Group Minutes for May 20, 2011

Consortium of Academic and Research Libraries in Illinois

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Recommended Citation

Consortium of Academic and Research Libraries in Illinois, "I-Share Users Group Minutes for May 20, 2011" (2011). *I-Share Users' Group*. Paper 9.
<http://digitalcommons.carli.illinois.edu/iug/9>

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I-Share Users Group Meeting Minutes

May 20, 2011

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

Members Absent: Mary Burkee.

CARLI Staff Attending: Lorna Engels; Kris Hammerstrand; Cathy Salika; Susan Singleton; Paige Weston

Guests: John Ballestro; Kati Donaghy; Susie Duncan; Lisa Gonzalez; Missy Laytham; Edith List; Julie Murphy; Ken Orenic; Mary Rose; Aimee Walker; Kathy Willis.

Minutes of April 15, 2011 were approved.

CARLI Updates

- There has not been a Board meeting since we last met; they meet again in June. Voting is currently open for Board positions and will be announced at the end of the voting period.
- \$70,000 has been allotted by the Board for a Patron Driven Acquisition (PDA) project in the coming fiscal year. This will be for books only. The current project does not include e-books, but there will likely be future initiatives in this area.
- The Collections Working Group is currently doing an analysis of duplicate copies of titles in I-Share and their circulation rates. They will be providing the Board with a general recommendation on the number of copies needed of any given title within the consortium, and a “best practices” recommendation on this will be forthcoming. Their preliminary report to the Board is due in June. This recommendation will likely be an important piece in future licensing negotiations with e-book vendors.
- SIUC is in the midst of a project that will transition their library’s main catalog entry point to the consortial Union Catalog rather than to their local catalog. Patrons will still be able to toggle to their local catalog. The CARLI staff are working with SIUC on a new banner that will stay with the patron in both the Union and local catalogs to better identify this situation. CARLI staff and other member libraries will be interested to hear SIUC patron and staff feedback on this alternative method of presenting the union and local catalogs.
- A demo version of XC is currently being created using UIUC data. This will be available for CARLI staff, and eventually other consortium teams and members, to begin looking at the current XC environment.
- Cathy Salika reported on CARLI staff’s participation in the Voyager 8 field test. The big enhancement for Voyager 8 is Global Data Change (which will be offered as a separate client), and thus this has been a major focus of CARLI testing. A number of issues have been identified and reported to Ex Libris, and a good number have already been addressed in newer drops. As Voyager 8 will not be in general release until at least July, there will not be sufficient time for CARLI to migrate to this version this summer. There are still plans to migrate to Voyager 7.2.? (exact version not yet determined) during the weekend of July 8, 2011.
- Tomcat WebVoyage use in CARLI institutions will be decommissioned on July 1, 2011. CARLI intends to continue to maintain/offer WebVoyage Classic to the membership.
- Additional UB Standardization policies will go into effect on July 1, 2011: all overdue fines for UB

transactions will be eliminated; faculty and academic staff will now be granted 6 renewals per item and all other patrons will continue to have a limit of 3 renewals; all audiovisual materials loaned via UB will have a 2 week loan with no renewals.

- Paige Weston demonstrated a development instance of VUFind in which Location facets are available. This facet is built on location limit groups which can be established in Voyager SysAdmin. This facet is currently being tested to see if the required overnight re-indexing has any negative effect on other necessary overnight processes. It was noted that this facet will be available in local catalogs only, not in the Union Catalog. Also, there will be no comparable pre-search “limits” for location.
- Paige also reported that she has been working with SIUC staff to offer new links to library specific information about the request process from any screen that offers the ability to request an item. The library will define where this link lands, and they will also maintain the information provided at that landing point. This feature will be made available to other libraries via the VUFind Customization Form.
- Lorna Engels reported that team volunteers have been chosen and that invitations have gone out to those folks. As soon they have acceptance back from all chosen, these appointments will be announced. Invitations to IUG volunteers have not yet gone out. Lorna did note that there were enough volunteers this year for all open positions.

Reports from IUG Team Chairs

- Each team chair presented a summary of their Annual Report and welcomed questions.
- Discussion of the OPAC team report included team discussion regarding the future of the catalog (this team mainly focuses on our current production catalog), usability testing (there has not been much success in getting sites to conduct testing), and feedback on the mobile interface (there have been some minor issues; there has been good usage of it).
- Discussion of the Resource Sharing report included a question of whether there are any resource sharing principles that should guide IUG and the Board as we move forward with e-book models and licensing (which ensued in a larger discussion of the e-book landscape for libraries) and a suggestion for a survey of the I-Share membership to see how members are currently handling interlibrary loan requests for Springer e-books with the intent of developing a best practice recommendation for this. It was also noted that IUG may want to have a joint meeting with Resource Sharing early in the coming year to further discuss the Springer e-book/interlibrary loan issue.
- Questions for the Acquisitions and Serials Team included whether or not there has been any team discussion of ERMS or PDA (there has not been much discussion within this team at this point - these are topics with considerable overlap with other teams and working groups that this team might want to partner with for future discussions). This led to a larger discussion on the need for more collaboration between teams and other working groups. Perhaps there is a need for forums with a broader focus, or topic driven gatherings for broader discussion.
- The main topic of discussion following the Cataloging and Authority Control Team report was RDA. After surveying the membership, the group found that smaller to mid-size libraries generally have a preference for webinar training and that larger libraries tended more toward in person training. It was noted that some changes may be needed in the public OPAC to optimize the changes in RDA cataloging, and this may need to be a future collaborative effort between this team and the OPAC team.
- Following the Instruction Team report it was noted that they have made good use of Google docs for team planning and collaboration and that others might want to look at this option. The team’s push to further communication efforts (twitter, etc.) was also noted. The team indicated that they do not have much feedback on this effort at this time as they have been using the newer methods for such a short time.

IUG members thanked all of the outgoing and incoming team chairs for their work and for participating in today's meeting.

ELUNA Report

- CARLI staff and IUG members that attended the ELUNA conference reported on their experience. There was a heavy focus on "Alma" at this conference. Alma developers are currently observing workflows in various libraries. CARLI staff would welcome a visit to our consortium to observe how a large consortium and its wide variety of member libraries operate. Other topics of interest were PDA and shelf list/inventory programs.
- The next ELUNA Conference will be in Salt Lake City during the week of May 6, 2012.

IUG End of Year Report

- It was agreed that our report should include a summary of the team reports; highlights of our meetings and work this year; recommendations we've made to the Board; and our change in leadership.
- Tom will draft this report and post for comments by Wednesday, May 25.

This was Mary Burkee, Sandy Craig and Karen Whisler's last IUG meeting for their current term of service. The group expressed great appreciation for their participation in our work! As two of these members had served as team liaisons, at our next IUG meeting we will need to appoint new liaisons to the Acquisitions and Serials Team and the Cataloging and Authority Control Team.

Meeting adjourned.