6-1-2011

I-Share Users' Group Annual Report Fiscal Year 2011

Consortium of Academic and Research Libraries in Illinois

I-Share User's Group Annual Report 2010-2011

Membership
Mary Burkee (2009-2011, St. U) University of Illinois Urbana-Champaign
Howard Carter (2010-2013, St. U) Southern Illinois University Carbondale
Mary Case (2010-2013, St. U) University of Illinois at Chicago
Belinda Cheek (2009-2012, Pr) North Central College
Sandy Craig (2008-2011, CC) Illinois Eastern Community College
Cindy Fuller (2010-2013, Pr) Millikin University
Tom Goetz (2010-2013, CC) William Rainey Harper College **(chair elect/interim chair)**
Nancy Laverdiere (2009—2012, St. U) Western Illinois University
Carlos Melian (2009-2012, St. U) Northeastern Illinois University
Carol Reid (2007-2010, CC) Heartland Community College,
Jason Rossi (2009-2011, Pr) Robert Morris University, **chair (resigned mid-term)**
Karen Whisler (2009-2011, St. U) Eastern Illinois University
 (*CC=community college; Pr=private; and St. U= state university*)
CARLI Staff Liaison: Lorna Engels

Activities
IUG met seven times in 2010-2011 including three conference calls and four in-person meetings. The reduced number of meetings and in-person meeting were in part a response to state-wide financial issues. Business matters included assigning new liaisons to the OPAC, Instruction, and ICAT teams. Thomas Goetz was elected chair for 2011-2012 and also agreed to take over as chair for the balance of the 10-11 term when Jason Rossi resigned in April.

In an advisory role IUG discussed and was kept up-to-date on future ILS products, including, Alma, XC, and Voyager 8. Other ongoing discussions included the improvement of communication from CARLI to liaisons to member libraries. A blog post highlighted some ideas in this area.

Resource sharing, in particular the new standardized loan periods were examined. As a result of these discussions the Resource Sharing Team was invited to the February IUG meetings. Faculty and grad students have shown dissatisfaction with some of the new policies as loan periods for those patron groups were reduced and the ability to renew three times in quick succession is not widely known. Discussion was well supported by borrowing statistics and a recommendation to extend the number of renewals by faculty was forwarded to the board. UB fines were also discussed. Members felt that most fines were not worth the time to collect them and that new functionality to block patrons would be more effective in getting materials back. Consequently IUG recommended that UB fines be eliminated with the return of an item and thresholds for fine notices be raised to $10.00. AV loans and E-Book lending have also been discussed as areas for future investigation. The UB loan recommendations served as the IUG mid-year report.

The CatEr Task Force made its final report during the July meeting. The report was accepted and turned over to ICAT for review and final dissemination. The task force was disbanded and thanked for its excellent work. IUG revisited the CatER recommendations during its April meeting; to be sure recommendations were being acted upon or were in the right hands. Ten recommendations were reviewed, two were referred to the OPAC team, two to the ICAT team and two to CARLI staff.

IUG wishes to thank outgoing IUG members Mary Burkee, Sandy Craig, and Karen Whistler for all of their hard work on behalf of IUG.

Future objectives

- IUG will continue to advise on future ILS developments
- Monitor standardized UB loans
- With the Resource Sharing team investigate E-book lending and increased AV lending.
- Patron driven acquisitions – Keep current with developing implementation models, monitor the upcoming CARLI PDA project and contribute to its evaluation and future development.

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)
Kati Donaghy Eureka College and Melissa Laytham *Co-Chairs.* Karen Whisler, Eastern Illinois University, *IUG Liaison.* Jennifer Masciadrelli, *CARLI Staff Liaison*

Accomplishments
Webinars
- Sponsored a Webinar on Voyager Complex Publication Patterns (CPP)
  - Webinars of identical content on October 18 and 19, 2010, with 43 people registered. Topics covered included showing examples of "problem" serials titles, explaining how to create and revise CPP patterns, and directing participants to documentation on the CARLI website.
  - The IACQ team also revised the Shared Complex Publication Patterns page hosted on the CARLI web site as a result of usage feedback from IACQ team members
- Sponsored a Webinar "Getting the Best Deal: Comparing Prices and Vendors" Two webinars of identical content on January 11 and 12, 2011, with 53 people registered. This webinar moved away from providing Voyager-specific training (a suggestion made by the IUG last year) to offering insights, formulas, spreadsheets, and Access queries to assist small academic libraries in comparing book prices from multiple vendors.

Sponsored Four Open Houses
- Eureka College, March 17, 2011 – 22 attendees. Staff presented a periodical inventory project; hosted breakout sessions about e-journals, budgeting, EDI/EOD, and problem periodicals; and offered a tour of the Reagan Museum and Peace Gardens. Evaluations were very positive, with attendees expressing satisfaction with the serials management emphasis.
- Northeastern Illinois University, March 24, 2011 – 22 attendees. Three joint sessions covered the NEIU Technical Services organization and structure, NEIU's ledger and fund structure, and a document delivery program that NEIU launched to combat ever-rising journal subscription costs. Participants also selected from four breakout sessions: workflows for acquiring/processing individual e-books, effects of budget cuts on purchasing, sharing Access reports formulas, and acquisitions/technical services staff contributions to strategic planning in the library.
- Southern Illinois University Carbondale, April 20, 2011 – 8 attendees. Staff highlighted several projects in Acquisitions, Preservation, and Cataloging departments: buying on demand, selling gifts online, the YBP shelf-ready process, and JSTOR. SIUC also provided tours of two preservation labs and projects, and a tour of the newly remodeled and expanded library. Wheaton College, May 12, 2011 – 23 attendees. The schedule included a walking tour highlighting the history of the college and library; a presentation of workflow changes implemented after the consulting firm R2 evaluated Wheaton's procedures; breakout sessions on music acquisitions and serials pay-per-view, plus open discussion sessions covering acquisitions and serials; and optional tours of the library and Wade Center.

Training and Documentation
- Completed a Revision of the IACQ Wiki on the CARLI website. This project to revise and organize acquisitions and serials documentation on CARLI's public wiki was started during the 2009-2010 fiscal year. The team spent the majority of this year writing necessary documentation, making final revisions, and annotating links. The wiki, which was made public in May, organizes in one location the information that is most pertinent to library acquisitions and serials staff
- Work was begun on creating Wink tutorials to be hosted on the CARLI website and linked to the IACQ Wiki. As of May, three tutorials are at or near completion.
- At the request of CARLI staff, the IACQ team agreed to provide documentation to explain Fiscal Period Close report processing. To meet this need, Sharon Nelson revised her institutional documentation and allowed its posting on the Acquisitions portion of the CARLI website.

Future Objectives:
- The IACQ team received several suggestions throughout the year for future webinars and forum events. Those suggestions will be evaluated at the close of this fiscal year or start of the next.

- The IACQ team will assess the need for additional Wink tutorials and the workflow involved with creating tutorials, or they divide into groups where some write scripts and others do the recording.
- The IACQ team may investigate hosting a joint forum with the ICAT team in 2011-2012, since there are many areas in which acquisitions and cataloging workflows overlap and/or affect each other.
- Early in 2010-2011, discussion focused on making materials selections and acquisitions in light of the shared catalog. Specifically how many copies of something are required throughout the consortium.

I-Share Cataloging & Authority Control Team
Mary Rose SIUE Chair, Mary Burkee UIUC IUG Liaison, Cathy Salika CARLI Staff Liaison.

Accomplishments:
Forums/Workshops
- Provided two Fall Forum webinars on September 21 on using Strawn utilities and recent cataloging changes (substantially planned the previous year);
- Sponsored in-person MarcEdit workshops conducted by MarcEdit creator Terry Reese October 25 at CSU and October 26 at ISU (substantially planned the previous year);
- Planned an in-person Spring Forum featuring presentations on RDA, Voyager Version 8, MarcEdit, and shelf-ready processing, May 17, 2011 at UIS.

RDA Preparation
- Established the ICAT RDA Implementation Subcommittee (IRIS);
- Created and maintained the " RDA Training Opportunities List" on the CARLI public wiki;
- Surveyed CARLI members about their needs regarding RDA implementation;
- Created and disseminated "ICAT Interim Recommendations for Managing RDA Data in I-Share";

Other Accomplishments
- Reviewed and approved the report prepared by the Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (CatER) and created and implemented consequent changes to the "Best Practices for Bibliographic Records from Non-OCLC Sources" and the "Cooperative Cataloging Guidelines for I-Share Databases" documents;
- Reviewed and approved various additions prepared by Casey Sutherland and CARLI staff to the "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" document;
- Tested updated consortial tag tables for Voyager;
- Authorized the implementation of a new "do not process mode" in CARLI's daily OCLC file processing;

- Analyzed de-duplication settings and authorized adjustments to reduce ISBN-based false overlays incident with bulk imports of ebook vendor records;
- Created and disseminated "Recommendations Regarding Series Tracing for I-Share Libraries".

Future Objectives
- Offer RDA training via in-person workshops and webinars, targeting webinars to smaller libraries and capturing them to enable asynchronous viewing;
- Providing recommendations and webinars on implementing the new LCGFT thesaurus for genre and form headings;
- Potential joint forum with IACQ on managing patron-driven acquisitions and/or e-book acquisitions and cataloging workflows.

I-Share Instruction Team
Aimee Walker North Central Chair, Thomas Goetz Harper College IUG Liaison, Lorna Engels CARLI staff Liaison.

Accomplishments:
Forums/Workshops
- The I-Share Instruction Team held its third annual Tutorial Creation Workshops on November 5th and 12th at the CARLI Offices and Dominican University respectively. The day's activities included a best practices presentation, critique of other tutorial examples, a scriptwriting and storyboarding activity, a mechanics of tutorial creation activity using the Wink tutorial creation software, and time for hands-on practice with assistance from the Instruction Team.
- The I-Share Instruction Team will hold its spring forum on Friday, June 10th at Heartland Community College. The theme of this year's forum is Collaboration and Embedded Librarianship. This theme was chosen based on feedback received from the 73 respondents who filled out the Instruction Team's Forum Topics Survey.

Other Accomplishments
- Social Media Initiatives included Twitter hashtag for communication at IBI events and expanded use of CARLI Blog.
- The last I-Share member library needs survey conducted by the I-Share Instruction Team was in May, 2007. The Instruction Team developed a brief, nine question survey that would gather respondent's needs regarding future forums and workshops. The survey yielded 73 responses from a variety of institutions. Based on the responses, the Instruction Team determined there was a large interest in a forum on the topic of embedded librarianship and collaboration with faculty. The team was also able to determine that many of the respondents were using, or planned to use, online tutorials and Research Guides (such as LibGuides) for instruction purposes. This information was used to help develop Instruction Team activities for the remainder of the year.

Future Objectives
- Expanded use of Instruction Materials portion of the CARLI wiki as a place for I-Share member libraries to collaborate on instruction initiatives
- Use of facebook in forum promotion

I-Share OPAC Team
Lisa Gonzalez Catholic Theological Union, Chair, IUG Liaison: Belinda Cheek, North Central College, Paige Weston CARLI Staff Liaison.

Accomplishments
The transition of the I-Share catalog interface from WebVoyage to VuFind in June 2010 meant that the team shifted its focus to the VuFind interface. The team's primary responsibility is providing input to CARLI staff about changes to the online catalog interface. The transition to the VuFind interface for the I-Share catalog meant that issues such as catalog record display and terminology used on various other page displays, as well as functionality from the WebVoyage Universal Catalog that did not exist in VuFind needed to be addressed. Changes to the VuFind interface were reported almost on a weekly basis on the VuFind Changes wiki, from minor wording changes to enhancements in functionality. Highlights of some of these changes include:

- A local/all toggle between the local catalog and the union catalog
- Returning the request first available function to the I-Share catalog
- More hyperlinked searches available on catalog records, and more precise searching on the hyperlinked string of subfields
- Refining and evaluating the information that appears at the top of the catalog record, as well as on the More Details tab
- Adjustments to the Advanced Search page include selecting more than one language as a limit, and the addition of a publication date limit and government publications limit
- Display local 59X fields on VuFind local catalogs

Providing the VuFind catalog in a mobile interface was a high priority, which began development at the University of Illinois and was made available to all I-Share libraries in January. The ability to customize the mobile interface color scheme was added to the VuFind customization form.

A Twitter feed was established to report on major catalog enhancements, in order to provide an additional venue for reporting changes besides the website. The website was reorganized to present information in a way that reflected the increased priority of the VuFind interface, to organize information by functions and tasks rather interfaces, and to include the eXtensible Catalog page that CARLI created in December.

Future Objectives

In terms of future plans, the XC project has been discussed, but since the charge of the I-OPAC team is to work with the production catalog, the team will expect to become involved with the project if and when it becomes a production catalog in the I-Share environment.

I-Share Resource Sharing Team
Susan Duncan UIUC, Chair, Howard Carter SIUC, IUG Liaison, Lorna Engels & Mel Farrell CARLI Staff Liaisons.

Accomplishments
Forums/Webinars

- "How Do We Get There From Here? : Making Local Policy Decisions in Your Library."
  October 20th 2010 at University of Illinois at Springfield The forum was held to address questions, problems and concerns with the UB Standardization put into place by CARLI on August 4th, as well as to assist attendees to use statistics to assist them with profiling decisions.
- "Student Staff Training in I-Share Libraries" Webinars April 6, 2011, April 7, 2011. Topics included, hiring process, contracts, confidentiality clauses, creation of tutorials, guides, manuals, checklists, Incentives/Rewards Discipline and morale, LibGuides and Wiki's

Documentation

- The Voyager Circulation and Universal Borrowing/Interlibrary Loan document *Reserves: Setup and Workflow* was reviewed and revised.
- A blog column, called *Circulation Tips & Tricks* was launched at Mel Farrell's suggestion:
- Reached agreement that the CARLI wiki *Circ/ILL Policies: A Chart of I-Share Library Practices* is of less use as policies become standardized, and is being updated less frequently. Links to each library's entry in the CARLI Directory have been added to their wiki listing. However, it may be the case that the wiki will no longer be needed as standardization continues.
- A new report, **Email notice count by type**, was requested, to simplify the keeping of statistics, and to help libraries make good decisions regarding the types of notices sent and the modes used. As a result of the report, inconsistencies with courtesy notice profiling were discovered and remedied.
- Developed a recommended text for courtesy notices that works for both local and UB patrons.

Other accomplishments
Participated with IUG on discussions concerning new standardized I-Share loan periods. Changes have been in effect since August 2010 making it a good time to review the policies for effectiveness.

Future Objectives

- A forum and webinar, one to be offered in Fall 2011, the other in Spring 2012.
- Implementation of UB blocks standardization with the Voyager upgrade planned for July 2011. Reviewing, troubleshooting, retraining, recommending changes as necessary.
- Discussion and recommendations for UB standardization of processing fee amounts and procedures.
- Continued discussion regarding ebook lending.

Respectfully submitted

Thomas Goetz, Chair I-Share Users Group