

I-SHARE USERS' GROUP ANNUAL REPORT 2012-2013

Annual report prepared by Ted Schwitzner, IUG Chair for 2012-2013
Team reports prepared by their respective chairs.

IUG MEMBERSHIP

Howard Carter (2010-2013, St. U) Southern Illinois University Carbondale
Christine Frank (2012-2013, Pr.) Rush University
Thomas Goetz (2010-2013, CC) William Rainey Harper College, past chair
Lisa Gonzalez (2012-2015, Pr.) Catholic Theological Union
Allen Lanham (2012-2013, St. U) Eastern Illinois University
Edith List (2012-2014, Pr.) Principia College
TJ Lusher (2012-2015, St. U) Northern Illinois University
Ted Schwitzner (2011-2014, St. U) Illinois State University, chair
Aimee Walker (2012-2015, Pr.) North Central College
(CC: community college; Pr.: private; St. U: state university)
CARLI Staff Liaison: Lorna Engels

ACTIVITIES

IUG met seven times over the course of the 2012-2013 fiscal year, with two meetings held by conference call only. The committee also completed business over email in between meetings, covering issues such as program scheduling, assignment of liaisons to teams, and draft review of minutes.

For this year, IUG focused primarily on two forward-looking issues: the evolution of IUG and its teams into a new committee structure, and providing ongoing support for I-Share Liaisons.

NEW COMMITTEE STRUCTURE

In September 2012, Tom Dorst provided IUG with the draft charge for the new I-Share Systems Committee, the proposed successor for IUG in a new committee structure drafted by the CARLI Board. This new structure will feature committees operating at the same hierarchical level, and reporting to the Board, with functional areas that have typically reported to IUG and its predecessor, the I-Share Users Advisory Group. The change offers areas such as resource sharing and technical services the opportunity to expand their scopes beyond a strict focus on the I-Share/Voyager environment. Yet, there remains a need for a group to integrate functional activities within I-Share.

IUG worked with the I-Share OPAC team to review and make recommendations as to the charge for its successor committee. Our discussions emphasized the importance of balancing the aspirations for Voyager and efforts to explore other options in the future with the current needs of member libraries. Collectively, we provided a revision that included support for I-Share Liaisons and support for existing tools that extend the functionality of Voyager, just as it includes responsibilities for looking beyond the platform and interfaces presently in use.

To further prepare for the change in structure, IUG held a joint meeting with the I-Share OPAC Team in March 2013. At this meeting, we reviewed the charge as approved by the Board, and we inventoried our anticipated new responsibilities. These ranged from evaluating the VuFind interface to providing guidance on the eXtensible Catalog, and from assisting with Voyager upgrade planning and training to evaluating open source systems. The joint meeting provided a good opportunity for our members to meet and begin to become acquainted with each other, which will hopefully allow us to work effectively in the coming year.

I-SHARE LIAISON FORUM 2013

I-Share Liaisons have been an important conduit for information between I-Share member libraries and CARLI, as well as with IUG itself. We believed that reinforcing the liaison role in communication with training and support through an I-Share Liaisons Forum would be valuable for both new and experienced member libraries. As the last forum for liaisons took place in 2008, IUG felt that the time was right for a repeat event. In order to allow the new members for 2012 to get migrated, a forum date was chosen for Spring 2013.

The 2013 I-Share Liaisons Forum was held on March 26 at Elmhurst College. Fifty-two liaisons registered for the event, including representatives from both newly integrated libraries and from libraries that will implement in 2013. A range of presentations focused on the unique communication and consortial advocacy roles of liaisons: liaison responsibilities, the new CARLI committee structure, specialized reports for Voyager System Administration, valuable but less known work requests, policy discussions on media lending and the five-copy guideline, and a tour of the relaunched CARLI website. Overall response to the forum was positive, with comments expressing appreciation for the content as well as for the opportunity to learn about upcoming developments for planning purposes. Responses to the post-forum survey also indicated that people valued the chance to network with other liaisons. Suggestions for future topics were received as well.

ADVISORY ACTIVITIES AND FUTURE INITIATIVES

IUG discussions have always involved advice and feedback to CARLI staff on issues of concern to IUG members and I-Share libraries alike. A brief view of such discussions follows, and we believe that many items require further action between CARLI and member institutions.

- The need for improved authentication and security for I-Share. Single-sign-on is an increasingly important mandate for institutional IT services, and I-Share must move towards this to satisfy both IT and patron interests.

- The effects of IT staff reductions at libraries. Member libraries are seeing IT functions moved out into institutional IT, resulting in less in-house business knowledge of library operations and the role of I-Share in that business. Will CARLI and its committees need to increase tech/systems support for libraries that no longer have staff to do System Administration? Will there need to be an increase in training and communication to IT groups? Will service level agreements with campus IT need to supplement the Membership Agreement?
- Support and development of third party tools for Voyager. A number of third party tools for Voyager are in use across CARLI, such as Shelflister and Catalogers Toolkit. Some of these tools were developed by libraries that might move on from Voyager to another platform. If the continued use of these tools is a priority for our members, do we have an opportunity and an obligation to ensure the continued stability of the tools? Does this extend to support for the broader Voyager community?
- Voyager upgrades and the OCLC Control Number expansion. Over the course of the year, IUG and CARLI staff monitored closely the position of Ex Libris regarding OCLC's news of a longer OCLC control number. Ex Libris indicated that support would be available in Voyager 8.2, but was unclear about support for Voyager 7.2.5, the version in service for I-Share. CARLI staff performed testing of the new numbers and discovered the effects that libraries will see. We will not need to do an emergency upgrade, but a move to the next version will be due soon.
- Ongoing monitoring of demand-driven acquisition initiatives.

Lastly, we commend CARLI's efforts this past year to reach out to not only library directors and deans, but to university presidents and other key decision-makers. The recognition that some issues will need to be solved with partnerships beyond the library and CARLI will help reinforce each institution's sense of investment in the success of the system we share.

SUMMARIES OF TEAM ACTIVITIES

IUG's functional teams have been essential to successful sharing of news, training, and member staff development. Their work enabled the staff at member institutions to grow and improve efficiencies, while also guiding some of the discussions at IUG regarding bigger picture issues involving I-Share. We greatly appreciate each group's accomplishments for the past year.

While each team's annual report follows below, some highlights bear mentioning as an introduction, and as an indication of the service and dedication of volunteers to our shared endeavor.

- Two teams embraced elements of the new committee structure early. Acquisitions and Serials added a team member from CARLI institution not using I-Share. Instruction revised its charge and scope to explore instruction issues beyond I-Share itself.

- All teams continued to gain experience in new modes of content delivery, with programs expressing considerable diversity in content, formats, and audiences. Teams experimented with different platforms for webinars, and included social media among their communications channels. An opportunity exists here for teams to share experiences and help each other along.
- Teams actively connected with each other to solve shared concerns. Concerns around the implementation of RDA were found in each team, which provided openings for the groups to share information and offer advice.

IUG extends its thanks to all I-Share team volunteers for the achievements of this year and for the foundations of the next.

I-SHARE ACQUISITIONS AND SERIALS TEAM

MEMBERSHIP:

John Ballestro (2010-2013) Southern Illinois University Carbondale
 Carol Doyle (2012-2015) Northwestern University
 James Edstrom (2011-2014) William Rainey Harper College
 Sharon Nelson (2010-2013) Northern Illinois University
 Eric Nygren (2012-2015) Newberry Library
 Carol Rhoades (2011-2014) Illinois State University
 Joan Schuitema (2011-2013) Northeastern Illinois University
 Stephen J. Smith (2011-2014) University of Illinois at Chicago
 Tonya Webb (2012-2015) University of Illinois at Urbana-Champaign
 Tom Goetz (2012-2013) William Rainey Harper College, *IUG Liaison*
 Jennifer Masciadrelli, *CARLI Staff Liaison*

2012-2013 ACCOMPLISHMENTS

Planned and executed two webinars:

- “Reconciling Voyager Acquisitions with your Institution's Accounting System” (November 28, 2012)—presented by Jim Edstrom, Harper College
- “Changing your Institution's Voyager Ledger and Fund Structure” (February 22, 2013)—presented by Carlos Melian, Northeastern Illinois University

Sponsored two open houses:

- University of Illinois at Urbana-Champaign (April 4, 2013)
- Wheaton College (May 22, 2013)

The feedback on these programs from participants was largely positive.

Re-linked the wiki pages to the new CARLI website (in-process)

- http://wiki.carli.illinois.edu/index.php/Acquisitions_and_Serials_Documentation

FUTURE PLANS:

In conjunction with other important structural changes within CARLI, IACQ is merging with ICAT to form a new Technical Services Committee that will begin operations during 2013-2014. The two users' groups held a conference call on April 1st to discuss the logistics of making this transition, focusing especially upon identifying the new committee's leadership. Lynette Fields from Southern Illinois University-Edwardsville and Jim Edstrom from Harper College (and current IACQ chair) have agreed to act as co-chairs for the coming year.

CHAIRPERSON'S COMMENTS:

IACQ held all of its meetings (except for the initial organization meeting) via conference call this year due to reduced travel budgets and increased gas prices. This worked very well this year; meetings moved very smoothly and efficiently, and team members remained in regular contact via e-mail as well. We were able to develop good working relationships among the team members and the committee benefited from everyone's expertise and counsel.

Respectfully submitted,
Jim Edstrom
Chair, 2012-2013

I-SHARE CATALOGING AND AUTHORITY CONTROL TEAM

Submitted May 6, 2013, by Lori Murphy

ICAT welcomed new and continuing members at its July 2012 meeting. New members for 2012: Lynnette Fields, (SIUE), Deborah Morris, (ROU) and Kavita Mundle (UIC). Continuing members: Susan Gallagher (UIS), Dennis McGuire (COL), Lori Murphy (DPU), Heather Parisi (DOM), Catherine Suchy (JOL) and John Whisler (EIU).

HIGHLIGHTS OF THE TEAM'S ACCOMPLISHMENTS THIS YEAR:

- Advised CARLI staff on revisions to the [RDA Resources](#) page on the CARLI site, November 2012
- Provided various RDA training opportunities:
 - [RDA for Everyone at I-Share Libraries](#), (webinar), December 5, 2012:
 - Over view of RDA and the rationale behind it
 - Impact of RDA on WebVoyage Classic and VuFind
 - Heading conflicts: an old problem get worse before it gets better
 - [RDA for Cataloging Staff at I-Share Libraries](#), (webinar), December 13, 2012:
 - [Response to questions about the FRBR as the basis of RDA, and the changes from AACR2 to RDA](#)

- [Strawn utilities for global headings changes and what kinds of tasks are best suited to this suite of tools and Techniques for manual heading correction](#)
 - *Consulted with CARLI staff on RDA training for original catalogers to be held in the spring of 2013.*
- Updated the [ICAT Recommendations for Managing RDA in I-Share](#), March 4, 2013.
- Began work on a best practices document for electronic bookplates.

I would like to thank all past and present members of ICAT for their dedication and Service.

As the consortium continues to grow and evolve, so does ICAT. This report is the last of the I-Share Cataloging and Authority Control Team's annual reports. ICAT will join with I-Share Acquisitions and Serials Team (IACQ) to form the Technical Services Committee, one of 10 new advisory committees.

A FEW HIGHLIGHTS OF THE TEAM'S ACCOMPLISHMENTS OVER THE YEARS:

ICAT inaugural meeting was August 17, 2006 in the CARLI office. Members: Susan Braxton (UIU), Jana Brubaker (NIU), Chew Chiat Naun (UIU), Tony Glass (ERK, IUG Liaison), Diane Lisle (NPU), Pricilla Matthews (ISU), Joan Schuitema (UIC), Pamela Thomas (ICC).

- 2006-2007 highlights
 - Documentation change from ILLINET Online to I-Share, ILCSO to I-Share or CARLI (as appropriate)
- 2007-2008
 - Cataloging Matters: Looking Forward fall forum
 - The Future is Now, but What Will It Look Like? (RDA updates)
 - Issues in Series Cataloging
 - New Developments Related to I-Share Cataloging Workflows
 - CARLI minutes template
- 2008-2009
 - Technical Services Workflow Analysis Seminar co-sponsored with I-Share Acquisitions/Serials Team
 - Regional Forum to Continue Tec Services Workflow Analysis Conversations
- 2009-2010
 - Interim Recommendations for Managing RDA in I-Share
 - ICAT Wiki page

- Revisions to ICAT's "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" document
- "A Different Look at Two Voyager Authority Reports" and "An Introduction to the VIAF Project"
- Local Metadata Standards: Providing Access to Digital Collections Through CONTENTdm"
- New blog series: Cataloging Tips and Tricks
- Issued statement on deletion of bib record 029 fields
- 2010-2011
 - Reviewed and approved report prepared by Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (CatER)
 - Established ICAT RDA Implementation Subcommittee (IRIS)
 - Forum topics: Strawn utilities, RDA implementation, Global Data Change functionality in Voyager V8, using MarcEdit and PromptCat set-up
 - MarcEdit workshops
- 2011-2012
 - Completed discussion of the Cataloging of Electronic Resources Task Force (CatER)
 - Developed recommendations and guidance for member libraries using the WorldCat Digital Collection Gateway
 - Forum webinars: Best cataloging practices for the I-Share environment, Database maintenance tools, Cataloging e-journals

I-SHARE INSTRUCTION TEAM

MEMBERSHIP

Co-Chair: Julie Murphy

Co-Chair: Chris Sweet

Past Chair: Ken Orenic

IUG Liaison: Aimee Walker

CARLI Staff Liaison: Lorna Engels

Susan Avery	2011-2014	University of Illinois at Urbana-Champaign
Molly Beestrum	2012-2015	Dominican University
Kirstin Duffin	2011-2014	Eastern Illinois University
Julie Murphy	2010-2013	Illinois State University
F. Elizabeth Nicholson	2011-2014	Aurora University
Nicole Ream-Sotamayor	2012-2015	Knox College

Chris Sweet	2010-2013	Illinois Wesleyan University
Frances Whaley	2012-2015	Illinois Valley Community College
Merna Youngblood	2010-2013	Illinois Eastern Community Colleges

The 2013 – 2014 Instruction Team Chair is yet to be determined.

In July 2012, three members joined the Instruction Team: Molly Beestrup, Dominican University; Nicole Ream-Sotamayor, Knox College; and Frances Whaley, Illinois Valley Community College. Nicole Ream-Sotamayor, Knox College, resigned her position on the Team after accepting a position at University of Illinois at Urbana-Champaign because we already had a representative from UIU. The vacancy will be filled for a 2-year term by a volunteer beginning July 2013.

In July 2013, membership terms for three current members will expire: Julie Murphy, Illinois State University, Chris Sweet, Illinois Wesleyan University, and Merna Youngblood, Illinois Eastern Community Colleges.

CHARGE

In early 2012 the team requested that IUG and CARLI review our charge and consider updating it. They agreed to do so, and our charge was updated in late 2012. The new charge more accurately reflects the work the committee has been performing for the past several years.

MEETINGS

The first Instruction Team meeting took place at the CARLI offices in Champaign, Illinois on July 31, 2012. Team members agreed to hold subsequent meetings via telephone and Adobe Connect on the third Friday of every other month, with additional meetings as needed to plan events. The Team decided to continue our practice of meeting using a combination of Adobe Connect and the telephone.

SOCIAL MEDIA

Blog: The Team decided to continue the past practice of posting to the I-Share blog Team events and other instruction-related information. All Team members were provided with permissions to edit the CARLI blog in order to post. Each member was encouraged to post a blog entry during an assigned month. Blog topics included promotion and recap of the Team’s Library Instruction Unconference, among others.

Twitter: The Team decided to continue using the hashtag #iliCARLI for Twitter posts during Instruction Team events.

Wiki: There was discussion on the usefulness of continuing with the Instruction Team portion of the CARLI Wiki. The team decided to reevaluate the usefulness of a wiki after CARLI completed its switch to a new website. The committee decided to keep the wiki for the time being as a location for links to past forums and to promote future events and materials for conferences.

INSTRUCTION TEAM UNCONFERENCE

Last year's Unconference was a success, so the team decided to hold another one. The Instruction Team's second Unconference took place at Illinois Wesleyan University on January 25th, 2013. The idea behind the Unconference was to have participants, drawing on their own ideas, expertise, and interests, generate the Unconference topics and then self-select into groups. Participants would generate discussion threads, and committee members would serve as facilitators for each group to, where necessary, initiate discussion, and to provide guidance. Approximately 50 participants attended the Unconference. Teaching faculty were also encouraged to attend, and several did so.

Each facilitator was responsible for taking notes from their respective groups. Notes on each session were recorded in a Google document, and a link was emailed to each conference participant. Participants were encouraged to add to the document as well.

SPRING FORUM

The I-Share Instruction Team will hold its Spring Forum on June 19th, 2013 at Heartland Community College. This year we decided to try another new format – an “Instruction Showcase.” We have issued a call for volunteers to present an innovative element of an instruction session that demonstrates an opportunity for meaningful learning and active participation on the part of the students.

The Forum will take place from 9:30 am to 3:00pm and will include an opening address, two 90-minute sessions of lesson presentations, roundtable discussions over lunch, and a wrap-up in the afternoon.

I-SHARE OPAC TEAM

MEMBERSHIP

Name	Term	Institution
Jamie Bourne	2012-2015	Oakton Community College
Kelly Fisher	2010-2013	Eureka College
Paul Go	2010-2013	Illinois Institute of Technology
Kirk Hess	2012-2015	University Illinois at Urbana-Champaign
Jacob Jeremiah	2010-2013	Roosevelt University
James LeFager	2012-2015	DePaul University
Rong Li	2011-2014	Illinois State University
Karl Pettitt	2011-2014	Wheaton College
Jan Waterhouse	2011-2014	University of Illinois at Springfield

I-Share Users' Group Liaison: TJ Lusher
CARLI Staff Liaison: Paige Weston

TEAM MEETINGS

- Met monthly on the second Wednesday at 10AM, except December 2012 and April 2013

ACCOMPLISHMENTS

- HathiTrust in I-Share webinar: covered what HathiTrust is, how to enable access to HathiTrust records from a local I-Share library catalog, and the potential issues that access can raise: <http://www.carli.illinois.edu/hathitrust-vufind-webinar-recording-available>
- New icon to display in the regular VuFind interface, to raise the visibility of the VuFind mobile interface: <http://www.carli.illinois.edu/sites/files/i-share/documentation/mobile-icon-snapshots.pdf>
- Discovery Layer webinar series: four webinars for I-Share member libraries to share their experiences with implementing discovery layer software. Two I-Share libraries presented during each session. Each session focused on a different discovery product: Summon, Primo, EBSCO Discovery or WorldCat Local. <http://www.carli.illinois.edu/products-services/i-share/opac/secure/discovery-layer-webinars-2013>
- Revised the WebVoyage and VuFind "differences" list: <http://www.carli.illinois.edu/products-services/i-share/opac/vufind-faq#6>

DISCUSSION ITEMS

- The "text me" feature in VuFind and long text messages
- Custom browser scripts interacting with VuFind
- CiteThis enhancement strategies
- Facebook integration issues
- VuFind 2.0: Should we re-merge code? Should we perform a gap analysis? Sidelined by XC news.
- VuFind/XC wish lists
- Electronic bookplate best practices
- RDA data display and reindexing needs

Respectfully submitted,
Paul Go, Chair 2012-2013

I-SHARE RESOURCE SHARING TEAM

MEMBERSHIP

Amanda Musacchio (chair	2010-2013	Adler School of Professional Psychology
Jennifer Funk	2012-2015	McKendree University
Sandra Harris	2012-2015	Olivet Nazarene University
Sarah McHone-Chase	2011-2014	Northern Illinois University
Matt Ostercamp	2011-2014	North Park University
Amanda Pippitt	2011-2014	Millikin University
Janelle Sander	2012-2015	University of Illinois at Urbana-Champaign

Lorna Engels CARLI staff liaison

Debbie Campbell CARLI staff liaison

Howard Carter is the IUG liaison.

Kathy Willis and Dan Patterson resigned from the team early in the year and their positions were not replaced.

ACTIVITIES

The Resource Sharing Team met every first Thursday of the month (with the exception of December) at 2:00. The first few meetings we met via teleconference, then about mid-year we started meeting online via Google Hangout video conference with great success.

We met in person in August for our first meeting of the fiscal year. At this meeting, we brainstormed some ideas for goals we would like to accomplish for the year. Some of these ideas included:

- Write a white paper on resource sharing in US and Canada
- Address the problem of sharing ebooks
- Demand driven acquisitions for consortial ebook buying
- Buy not borrow as a way to provide resources
- Purpose of ILL – academic/leisure uses
- Loaning of media in IShare
- Lending of articles

An in-person forum was planned for October 19th at Illinois Valley Community College, but was canceled due to low registration. In place of the forum, we held a webinar on December 6 covering the following topics: interlibrary relations & fines; realistic expectations for lost/ damaged books, Interlibrary loaning electronic resources and training and customer service for student workers. Each topic was presented for 20 minutes followed by a 10 minute discussion, and the entire webinar was offered once in the morning and again in the afternoon. About 30 people attended each webinar topic.

We discussed topics such as: duplicate VuFind bibliographic records in the I-Share catalog due to RDA and AACR2 records, Shelflister 3.0, upcoming interlibrary loan changes with WorldShare, lost item counts and reports.

The spring resource sharing team forum will be held on June 6th at Illinois Valley Community College. Registration opened on April 29th and we do already have some registrants. The agenda for the forum is as follows:

- i. Morning Session- Short presentation on new CARLI website, Cathy Salika on reports (& including annual statistics), panel discussion on various types of reports and how they are used by various libraries).

- ii. Afternoon Breakout Sessions- 1) Staff training using screenshot software and Powerpoint (Amanda M.), 2) “Unconference”-style session on textbooks and interlibrary loan (will develop list of questions for groups to work from).

This is Amanda Musacchio’s last year on the team, and there are two openings from resignations.

Respectfully submitted,
Amanda Musacchio
Chairperson, Resource Sharing Team