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## CARLI News August 31, 2009

Consortium of Academic and Research Libraries in Illinois

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# CARLI News

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August 31, 2009

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## Mark Your Calendars for the CARLI Annual Meeting

Registration will be announced soon for the CARLI Annual Meeting to be held on Friday, October 30th at the I Hotel and Conference Center, Champaign. The theme of the meeting will be "Finding Opportunities in a Time of Economic Crisis." We will hold breakfast meetings of the Governing Directors and the CARLI Committee Chairs beginning at 8:30 a.m., before the Annual Meeting.

## E-Resources

### ARTstor and JSTOR Agreements Being Negotiated

CARLI recently conducted a survey to assess interest in 5 products for possible agreements: JSTOR, ARTstor, Sage e-reference, Palgrave eConnect, Lexis Nexis Congressional Research Digital Collection. CARLI policy guidelines require at least 5 libraries be interested in a product before we move forward with licensing. Applying that standard, only JSTOR and ARTstor received enough interest and agreements for both products are being negotiated. Information about the new agreements will be sent to libraries that expressed interest on the survey.

### Outcome of Negotiations for Science

CARLI staff had also been in negotiations with AAAS and EBSCO for an agreement for the journal Science. CARLI has a policy requiring a minimum consortial discount of 10% and unfortunately the discount offered for this product did not meet that level, so those negotiations have been terminated.

### New ERMS Interest Group Email List

CARLI has established a new Electronic Resource Management Systems (ERMS) Interest Group email list for those interested in sharing with, and learning from, their colleagues at other CARLI libraries about electronic resource management and electronic resource management systems.

Topics of discussion might include:

- Comparing homemade and commercial ERMs
- Sharing experiences regarding ER licenses
- Discussing patron authentication issues
- Reviewing practices for publicizing ER holdings and ER trials
- Discussing, interpreting, and using ER statistics

[Subscribe.](#)

## **Ensuring Enduring Access Forum Materials Available**

The CARLI Digital Collections Users' Group recently held a forum on digital preservation called "Ensuring Enduring Access." Presentations and handouts from the forum are available on the CARLI website for anyone who wasn't able to attend or for those attendees who would like access to the day's content.

They can be accessed from the [event page](#) or from the [CARLI Member Training page](#).

## **Collections**

### **Last Copy Home for VHS Needed**

The CARLI Last Copy Pilot Project began this past April and will run until May 2010. Thanks to all who have participated to date. We have had over 470 items that have been submitted to the program—with 160 items being submitted this past month!

More information about the program is on the [CARLI web site](#). To participate, complete the online form with information about your last copy. The online form will generate responses to the donor and the potential recipient for your item. If you have any questions about the program, please send a note to [support@carli.illinois.edu](mailto:support@carli.illinois.edu).

Would your institution be interested helping out your fellow CARLI members? If your institution is interested in being the last copy home of the VHS tape format, please send a note to [support@carli.illinois.edu](mailto:support@carli.illinois.edu).

### **Fall Collections Forum Cancelled**

The fall Collections Forum planned for October 2, 2009 at the Illinois Institute of Technology in Chicago has been cancelled.

### **ILDS Reports Growth in 2009**

With 18 months of CARLI managed delivery service completed, initial comparative statistics are now available. For the first six months of 2009, ILDS transported 708,308 items. This represents a 2.4% increase over the first half of 2008. Although no longer included, the transportation of new delivery bags and other supplies was counted along with books for the first few months of the service. In addition, the transition between the old and new ILDS in January 2008 generated substantial, and possibly atypical, traffic. These factors suggest that the actual growth in the delivery of library materials in the first half of 2009 is higher. Comparing the second quarter (March-June), ILDS delivers grew by 5.4% in 2009 over the same period in 2008. We expect to see continued growth in volume as resource sharing plays an increasingly critical role in meeting the information needs of students, faculty and staff at all CARLI member institutions.

## **I-Share**

### **WebVoyage Version 6 Restored**

As previously announced, WebVoyage is again running on version 6. This change was made to address serious performance problems this summer following the upgrade to WebVoyage version 7.

CARLI staff are continuing to work with Ex Libris on identifying the source of the problems and to determine an acceptable solution. Until we know the causes and find ways to address them, we cannot predict a timeline for re-deploying WebVoyage 7. We will continue to keep you updated on the status of our work.

As always, if you have problems with CARLI systems, particularly problems not described on the [system status web page](#), please report them to [support@carli.illinois.edu](mailto:support@carli.illinois.edu). We appreciate your patience as we work through these issues.

### **No Libraries to be Added to I-Share in 2009-2010**

CARLI will be unable to accept and implement new I-Share participating libraries during the 2009-2010 fiscal year. We know that several libraries were eagerly anticipating moving to I-Share this year and we regret that we will not be able to fulfill those expectations.

Addressing WebVoyage 7 performance issues resulting from the Voyager upgrade in June must take priority over increased participation. We are continuing to work with Ex Libris on identifying the source of the problems in WebVoyage. So far, the specific cause(s) have not been identified. Obviously, until we know the causes and find ways to address them, we cannot predict a timeline for accepting additional I-Share libraries.

Resolving these problems must be our top priority for I-Share for this year. While we want to be able to extend the option of participation in I-Share to more CARLI libraries, it is simply not prudent to do so until we are more confident that the current system can support participation growth. We hope to be able to open I-Share participation next year, but we cannot currently promise that we will be able to do so. An announcement about next year will be made by Spring 2010.

Again, we regret having to suspend I-Share expansion this year and we hope that this situation can be resolved as soon as possible. Be assured that our goal is to provide an integrated library system that functions reliably and well and is available to support resource sharing for as many CARLI members as possible.

## I-Share Users' Group

The I-Share Users' Group met on August 21, the first meeting of the new fiscal year. The IUG reported that the Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force 2009 (CatER) has already begun their work. They will be touching base with IUG in November. The IUG was updated on the WebVoyage 7 back out and they discussed possible effects on the work of different groups under IUG's purview. The IUG also continued discussion about the ILS of the future. The IUG will meet next on September 18.

## FY2009 Consortial Statistics Now Available

The [I-Share consortial statistics](#) for FY2009 have been posted to the CARLI web site.

Those consortial stats include:

- Collection Stat 8: Database Record Count
- Collection Stat 9: Unique Titles Report
- UB Stat 1 - Outgoing ILL [Lending]
- UB Stat 2 - Incoming ILL [Borrowing]
- Borrowing and Lending Comparison FY2009

\*NEW\* this year:

Borrowing and Lending Comparison FY2009—Lending [Outgoing] and Borrowing [Incoming] totals in one view for easy comparison.

Details and descriptions of each report can be found in the document "[Annual Voyager Statistics Package](#)".

## Revised Patron Batch Load Document Posted

With the new academic year upon us, many libraries will be loading new batches of patron records into their Voyager databases.

[Newly revised documentation](#) on the process of loading patron data is available on the CARLI web site. Highlights of the changes in the new document include:

- References to ILCSO in the pre-load diagnostics reports have been removed
- References to de-duping by use of SSN have also been removed from the reports
- New diagnostic report that gives the count of address types [permanent, temp, email] for each patron group
- New descriptive sections to the "III. Preparing the Data" section. **Note:** these sections are important for libraries that load patron data with the barcode number field intentionally blank-filled or email address field intentionally blank-filled. Libraries that do load with these fields blank-filled typically add barcodes and email addresses at the Circulation Desk.

## Circulation Best Practices Reminders

With the new academic year, come new users. That usually means new staff to be trained in the library as well. Here are a few reminders about general best practices in circulation and Universal Borrowing:

Routing items—in Voyager Call Slip, when processing requests from other I-Share libraries, all you have to do is click the "Process" button in the Call Slip Daemon. This places the item in the proper routing status "In Transit on Hold from XXX to XXX." After you tuck the routing slip paperwork in the item you can then prepare it for ILDS delivery. With the major exception of ILLINET Library request processing, there is no need to do any extra Circulation Client transactions—discharges or charges. The receiving library will discharge it when they receive it. Then when the user comes in to pick the item up, the operator at the patron's pickup location will charge it.

Approximately 15% of resource sharing in I-Share comes from requests placed by non-I-Share ILLINET Libraries. When I-Share libraries loan items to non-I-Share libraries they are supposed to perform one more step in the workflow before sending the items, that is, to charge the item to the non-I-Share library. Make sure your staff are trained to distinguish an ILLINET Library request when they are received via the Call Slip Client, and that they know the correct workflow to process those requests. A [complete set of instructions](#) for processing ILLINET Library requests is on the CARLI website.

Circulation Calendars—make sure that your academic year calendars are in place. Create them as far into the future as you know at this time. This avoids problems at check-out—e.g., getting error messages about "no valid calendar," etc.

Call Slip Email Preferences—I-Share libraries should not be sending out email notification from the Call Slip Client. The preferences for e-mail should be turned off. This is accomplished by using the proper settings in the [Email Options] stanza of the callslip.ini. Libraries that use the CARLI Update Checker to load Voyager software, will get the custom-configured callslip.ini with these settings correctly configured. If you manually load the Voyager client software on your library's PCs, use the [custom-configured file](#) on the CARLI web site.

Problems—Occasionally things go awry when processing items. If you do experience difficulty routing items in, charging to patrons, etc. and you can't resolve it yourself, contact the item's or patron's library. Sometimes the other library's Circulation Desk will have to check something out for you. If you have to send something out already charged, for example, let the receiving library know with a note or streamer tucked into the item. Or let them know ahead of time by calling them and alerting them to the situation.

## Fall Resource Sharing Forum Oct. 15

The I-Share Resource Sharing Team has scheduled its Fall Forum: "Back to Basics While Looking Forward." It will be held at Governors

State University, University Park on October 15.

Planning is underway for presentations and discussions on:

- Patron Record Management
- Call Slip Processing Workflows
- Customizing Notices and .ini files
- Troubleshooting & Support Best Practices
- Future of the ILS

More information and registration will be available soon.

### **ICAT Fall Forum Webinars December 2 and 3**

Based on feedback from attendees at the spring forum, and the need to accommodate reduced travel budgets, the I-Share Cataloging and Authority Control (ICAT) team will hold a series of web-based sessions rather than one in-person meeting as they have done in the past.

The Forum will consist of up to 4 sessions, each on a different topic. The topics/agenda for the sessions are still being finalized, but please save these dates on your calendar:

- Dec 2 from 10 am to 12 noon
- Dec 2 from 1:30 pm to 3:30 pm
- Dec 3 from 10 am to 12 noon
- Dec 3 from 1:30 pm to 3:30 pm

Event details and registration information will be available later this fall.

### **Book Withdrawal Bill Signed by Governor**

The Governor recently signed Illinois House Bill 49 (now Public Act 96-0498), which will permit state-supported academic libraries to sell their withdrawn materials or to donate them to a much larger group of organizations. Because of the way that the statute had been written, many public academic libraries in Illinois had been throwing away their withdrawn materials.

Dane Ward, Associate Dean for Public Services at Illinois State University and former Chair of the CARLI Public Services Working Group worked closely with State Representative Dan Brady on the legislation.

See the [history](#) of the bill.

Read the [full text](#) of the legislation.

### **Preservation**

#### **Registration Open for the CARLI AudioVisual Preservation Forum**

Registration is now open for the day long "AudioVisual Preservation Forum." The forum will take place on Tuesday, October 13th at Columbia College Chicago and is open to interested staff from all CARLI member libraries.

The program will help you if you have photographs or films within your collection, want to know more on how to identify the format of your audiovisual materials, or want to know how to care and preserve audiovisual materials for future generations of users.

[Register](#) by October 1st. We hope to see you there!

#### **Burn Simulation and Disaster Recovery Materials Available**

The CARLI Preservation Working Group held workshops in June at the Illinois Fire Service Institute in Champaign on disaster planning and recovery after a fire event. Presentations from this program can be found on the CARLI website for anyone who wasn't able to attend or for those attendees who would like access to the day's content:

They can be accessed at from the [CARLI Member Training](#) page . Also, pictures from the day are on the CARLI Facebook page.

#### **Preservation Tip: Book Snakes—A Fun Preservation Project**

Want to encourage preservation in your library while also having fun? Set up a book snake construction workshop! Book snakes are long, thin flexible weights that are used to gently hold open books during repair, cataloging, exhibition, or a range of other library tasks. They can be partially prepared quickly by anybody with a little sewing knowledge, and then finished and personalized by your library staff members in only a few minutes. Here's how to create your own book snakes...

#### **Tools and Materials Required**

- Medium to heavy-weight cloth (approximately 4x10 inch rectangle)
- Weights (washed, smooth aquarium gravel works well)
- Needle and Thread
- Funnel

- Felt for tongue, plastic "googly" eyes, and craft glue, if desired

#### Assembly Steps

1. Fold the cloth in half, length-wise.
2. Using a sewing machine or needle and thread, sew along two edges, leaving a short side open.
3. Turn the tube inside-out using the eraser end of a pencil, if necessary.
4. Using a funnel, fill the tube with your chosen weight material, leaving at least an inch at the top for cloth turn-in and weight movement.
5. Turn in the raw edges of the open end on themselves and sew the tube closed using a needle and thread and an over-casting (whip) stitch.
6. Personalize with felt tongue and eyes, if desired, attached with craft glue.

### Upcoming CARLI Events and Meetings

#### Forums and Workshops

- September 10 Macro Express Workshop: Cataloging functions, CARLI Office  
 September 15 Macro Express Workshop: Circulation functions, CARLI Office
- October 13 AudioVisual Preservation Forum, Columbia College, Chicago  
 October 15 I-Share Resource Sharing Forum, Governors State University, University Park  
 October 30 Committee and Working Group Chairs, I Hotel and Conference Center, Champaign  
 October 30 Governing Directors, I Hotel and Conference Center, Champaign  
 October 30 CARLI Annual Membership Meeting, I Hotel and Conference Center, Champaign

#### Meetings

- September 2 I-Share Instruction Team Meeting  
 September 2 Program Planning Committee  
 September 3 E-Resources Health Sciences Advisory Group  
 September 4 Public Services Working Group Program Evaluations  
 September 8 I-Share Cataloging and Authority Control Team  
 September 8 I-Share Users' Group OPAC Team  
 September 10 I-Share Resource Sharing Team  
 September 14 E-Resources Working Group  
 September 16 Digital Collections Users' Group
- September 16 I-Share Acquisitions and Serials Team, CARLI Office, Champaign  
 September 16 Executive Committee  
 September 18 I-Share Users' Group, CARLI Office, Champaign  
 September 24 I-Share Users' Group CatER Task Force, CARLI Office, Champaign  
 September 25 CARLI Board Meeting, CARLI Office, Champaign
- October 2 Collections Working Group, CARLI Office, Champaign  
 October 5 Preservation Working Group  
 October 7 I-Share Instruction Team  
 October 8 I-Share Resource Sharing Team  
 October 12 E-Resources Working Group  
 October 12 CARLI Collections Enhancement Awards Program Evaluation Task Force  
 October 13 I-Share Cataloging and Authority Control Team  
 October 13 I-Share Users' Group OPAC Team  
 October 21 Digital Collections Users' Group  
 October 21 I-Share Acquisitions and Serials Team, CARLI office  
 October 23 I-Share Users' Group

For meeting times and locations or for additional information about upcoming CARLI forums, trainings, and meetings consult the [CARLI calendar](#).

#### Contact Us

All questions and comments about the e-newsletter should be directed to [support@carli.illinois.edu](mailto:support@carli.illinois.edu). [Subscribe](#) to the CARLI Announce email list at to receive the latest news.