

# **VTLS Users' Group**



**Annual Report – 2004**

# Initial reservations...

VUG...IUG...EUG... AUG...SUGOV.... if you ever had any initial reservations about being part of a users' group, this report will explain some initials and help to quell reservations.<sup>1</sup>

It has been twenty years since a group of interested customers of VTLS Classic organized into a group to share information. Twenty years later, VTLS has more products and services (RFID, Imaging, e-Commerce, etc.), and although Virtua still remains the focus of the energy and time we gather each year for, we have had to change the ways in which we think about ourselves and how we can best help the vendor help us.

First, let us explain some of these letters:

**VUG/IUG** – We have used these acronyms interchangeably over the past few years. The VTLS International Users' Group is one group. Primarily a group devoted to knowledge-sharing and advocacy, we consist of interested VTLS customers who represent a strong voice in recommending product and service enhancements to VTLS.

**EUG** - The European Users' Group is a sub-group of the International Group (although many of us acknowledge that it is more international in scope). Each EUG member is also a member of the VTLS IUG and gather for their own meeting each year in the autumn to discuss enhancement issues that have an impact on all users but also issues that are specific to European libraries (e.g. translations) The EUG has standing committees organized by Virtua module, and their activities are overseen by a Steering Committee comprised of representation from many different European countries.

**AUG** – In 2003, Australian VTLS customers organized their own regional group to share information, resources, and training opportunities.

**SUGOV** – The Swiss Users' group of VTLS is a collection of libraries who meet regularly to discuss issues specific to Swiss library implementations of Virtua software.

**Other User Groups**- In addition to the other groups mentioned above, there are regional groups in Poland, Spain, Brazil, and Malaysia.

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<sup>1</sup> The latest ALA list of acronyms totals about 186

## Enhancements....

Enhancements are ways in which the software can be redesigned to work better and more flexibly. The European Users' Group has an experienced set of standing committees who each year discuss (and via email, throughout the year) and prioritize proposed enhancements based on Virtua modules. The new process of assigning development points to each enhancement is something the users' group has helped to implement and also identified problem areas in these processes; VTLS has expressed their commitment to further improve these processes as a direct result of user group advocacy. In addition, the company has ensured an allocation of user group suggested development in each release, and we continue to press for a more streamlined way of getting enhancements accepted by the VTLS design group. The IM database where these enhancements are stored are often crosslinked with other requests, and the users' group has been instrumental in helping VTLS clean this up to better focus our needs.

## Meetings...

Two meetings were held in 2004: 1) IUG in Blacksburg, Virginia at VTLS Headquarters and 2) EUG in Bern, Switzerland. Both conferences featured a mix of training conducted by VTLS staff, presentations by VTLS management, as well as presentations by VTLS partners and UG members.

The Executive Committee held two meetings this past year: to review financials, plan for upcoming conferences and to generate ideas to be explored in setting the direction for the organization in the year ahead.

In the next year, we will continue our efforts to improve the enhancement processes, produce rewarding conferences and meetings and work closely with VTLS to communicate the needs of our group.

Finally, I want to note that some of you will be asked to serve on the Board in the year ahead. I hope you will consider making that contribution to the membership. It can be very rewarding work.



**Kerstin Dahl**  
**Chair, Users Group**

# Benefits of Users' Group Membership...

- **Vote on Enhancements.** One of the most important goals of the Users' Group is to provide structured and agreed upon input to VTLS about desired enhancements in the products. The Users' Group works to determine the top priority enhancements to be considered for voting by the Users' Group membership. Only UG members get to vote on the enhancements to be done by VTLS. VTLS has established an allocation of guaranteed development resources and the Users' Group alone determines how these resources will be spent. Versions 44/45/46 of VIRTUA included a total of over 50 User Group determined enhancements, including:
  - Ability for the system to automatically compress holdings
  - Serials pattern editor
  - FRBR enhancements.
  - Ability for patrons via the *iPortal* to make acquisitions purchase suggestions.
  - Global redesign of filter functionality in the Vectors *iPortal* with enhanced filtering that includes support for multiple languages and library configuration.
  - Ability to set a parameter that allows for the integration of the authentication of Virtua users with an external LDAP-based database.
  - Ability to request any record from the cart in the Vectors *iPortal*.
  - Ability to mask individual holdings records.
  - Support for a shortcut that will allow users to close all open windows without closing the Virtua client itself.
  - Support for an "in-house usage count" that will require circulation users to wand materials only once to show in-house usage
  - Support for location filtering for browse searches in the Virtua client.
  - Support for an XML-based Item Detail screen in the *iPortal*,
  
- **Eligibility to Serve on Standing Committees.** The first prioritization on enhancements is done by the Standing Committees. These individuals review hundreds of ideas and narrow down the dozens that are finally voted upon. Only members of the Users' Group may serve on the Standing Committees. This valued group of individuals serves to understand the the many types and needs of all international users, and helps to prioritize those needs to ensure the voice of the customers is heard and addressed through the company's enhancement process.
  
- **ViTaLinkS.** The Users' Group newsletter features stories, ideas and information about customers. It's an online publication, produced by members of the Users' Group for members of the group to serve as another communication path for sharing ideas and information.
  
- **Listserv Subscription.** The unmoderated UG listserv is a valued communications vehicle for asking information, seeking advice or sharing ideas. Open only to members, it can be a quick path to an idea or solution for users of VTLS products and services.
  
- **Become Eligible to Serve on Board.** Members of the Users' Group become eligible to serve on the Executive Board. Here, the direction of the Users' Group is set, priorities are established, communications with the company's administration are effectively nurtured and sustained, and conference formats and agendas are established.
  
- **Full Access to Users' Group Website.** While the Users' Group website is open to the world, sections of the website are reserved for members only. These sections include information about by-laws, financial reports, working committees, listserv information, events and the newsletter.

- **Eligibility and Discounts for Attending Conferences.** The Users' Group conferences represent important opportunities to learn about product development plans, company status and directions, new partnerships, customer needs that can be addressed through those partnerships, and the extensive opportunities to network with other customers. It's also a great way to travel the world. The VTLS Users' Groups typically hold two conferences every year, one in North America and one in an international location. Recent years have included international meetings in Spain, Switzerland and Egypt/Poland are being discussed. More importantly, members of the Users' Groups get discounts on their attendance fees at these conferences, making it all the more affordable to gain access to these important opportunities. You can learn about new products, company directions and hear how fellow customers are doing leading edge activities using company products.
- **Meet with your colleagues,** to see creative ways VTLS software is being used and implemented, to see new products from VTLS partners; and to gain a fuller understanding of the strategic direction of VTLS.
- **Provide Valued Advice to VTLS Management.** The management of VTLS seeks, listens and acts upon advice given by the Board of the Users' Group. In recent times, some of the results of this advice has included: 1) opening up customer access to the company's online knowledge base concerning software restrictions and enhancements 2) restructuring the enhancement process to ensure productive results of the work done by customers in developing lists of enhancements and 3) changing the training programs at conferences.

## Finances...

**Our Users' Group finances remain healthy, with a positive net position remaining in our bank accounts. The Users' Group meetings produced small returns. Our membership fees remain our primary method of producing the income needed to run the organization and it therefore remains critically important that if you value the work of the group, that you remain a member of the organization.**

<b>ASSETS</b>	
Cash and Bank Accounts	<b>8,946.95</b>
VTLS Checking Ending Balance	
Checks Payable	<b>74.78</b>
TOTAL VTLS Checking	<b>9,021.73</b>
TOTAL Cash and Bank Accounts	<b>9,021.73</b>
Investments CD	<b>12,091.50</b>
TOTAL Investments	<b>12,091.50</b>
<b>TOTAL ASSETS</b>	<b>21,113.23</b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>LIABILITIES</b>	
Checks Payable	<b>74.78</b>
<b>TOTAL LIABILITIES</b>	<b>74.78</b>
<b>EQUITY</b>	<b>21,038.45</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>21,113.23</b>
Bank,Cash,CC Accounts1/6/05 Summary Report 7/1/03 Through 6/30/04	
<b>INCOME</b>	
2003 VUG Meeting	<b>2,200.00</b>
Donations VUG 2004	<b>750.00</b>
FY 2004 Membership	<b>13,181.00</b>
FY 2005 Membership	<b>300.00</b>
Registrations VUG 2004	<b>0.00</b>
<b>TOTAL INCOME</b>	<b>16,431.00</b>
<b>EXPENSES</b>	
Bank Charge	<b>240.00</b>
European Users Group 2003	<b>1,160.00</b>
Exec Meeting - Wilmington 2003	<b>4,451.71</b>
VOIDED	<b>0.00</b>
VUG 2004	<b>2,966.73</b>
Wilmington 2003	<b>1,000.00</b>
<b>TOTAL EXPENSES</b>	<b>9,818.44</b>
<b>TOTAL INCOME - EXPENSES</b>	<b>6,612.56</b>

**David Paynter**  
Treasurer

# Members of the Executive Committee



**Kerstin Dahl (2003-2005)**

**Head, Automation Department, Lund University Library**

Technical services librarian, Lund university library 1967-1971  
Head of library, Research policy institute, Lund, 1971-1986  
University of Michigan, Ann Arbor. A two months' grant. 1986  
Automation department, Lund university library 1986-1988  
Head of automation department, Lund university library 1988-  
Swedish association for research and university libraries. Treasurer 1988-1994  
Automation consultant to Latvian National Library, Riga Latvia 1993-1996  
Swedish library association. Board member 1994-  
IFLA's Standing committee for cataloging 1995-  
Automation consultant to EU-funded projects in Tomsk and Kemerov, Siberia 1998 - 2003.



**Richard McKinstry (2005)**

**Vice-Chair**

Henry Francis du Pont Winterthur Museum, Winterthur, DE 19735. August 1977-date.  
Andrew W. Mellon Senior Librarian.  
Formerly: Librarian, Joseph Downs Collection of Manuscripts and Printed Ephemera / Winterthur Archivist;  
Bibliographic Systems Librarian; Librarian, Collection of Printed Books and Periodicals Acting Library Director, May 1993-May 1994.  
Adjunct Associate Professor, University of Delaware, 2001-date.  
New Jersey Historical Society, 230 Broadway, Newark, NJ 07104. January 1973- July 1977.  
Reference Librarian.  
African-American History Museum of Delaware (Board of Directors, 2001-2003)  
American Association for State and Local History (Chaired session on trade literature at 1997 annual meeting)  
American Historical Print Collectors Society (Delivered talk, "Prints as Illustrations," for 1979 annual meeting)  
American Library Association (Delivered talk, "Genealogical Sources at The New Jersey Historical Society," for 93rd annual conference, 1974)  
Ephemera Society of America (Board of Directors, 1997-2000, ex-officio, 2001-2003; Vice President, 1998; President, 1999-2000)  
Grolier Club (proposed and elected to membership September 2004)  
Mid-Atlantic Regional Archives Conference (Delaware State Representative, 2002-2006; Local Arrangements Committee for Spring 1991, Fall 1995, and Fall 1996 meetings, Wilmington, Del.; delivered talk, "Volunteers in Archives," Spring 1996 meeting)  
National Endowment for the Humanities (Invited to be a reviewer of grant applications, August 1995)  
New Jersey Library Association (Member of nominating committee for officers of the History and Bibliography Section, 1975; contributor to association's bibliography on New Jersey in the American Revolution)  
New Jersey Press Association (Judge for awards of newspaper articles about New Jersey in the American Revolution, 1977)  
VTLS Users' group (Board of Directors, 2000-date; Vice Chair, 2003-2005)



**David Paynter**  
**Treasurer**

Director, New Hanover County Public Library, Wilmington, NC 1982 - present  
Director, Florence County Library, Florence, SC 1978 - 1982  
Assist. Director, Fairfield Public Library, Fairfield, CT 1974 - 1978  
PLA Board of Directors, 2003 - present  
NCLA Board of Directors, 2003 -present  
PLA Program Committee, Member 2000-2002  
PLA Partners Committee Chair 2002-2003  
VTLS Users Group, Chair 2000

VTLS Users Group, Treasurer 2001 –  
North Carolina Public Library Directors Association, Vice President 2000  
North Carolina Public Library Directors Association, President 2001  
North Carolina Library Association Legislation Committee, Member 2000 -  
North Carolina Preservation Consortium, Board Member 1992 - 1997 Resource  
Carolina at Chapel Hill, Member 2002-  
SOLINET Public Library Advisory Board, Member 2001- present

## Representatives-at-large



### Pat Anderson (2006)

Pat has been with the Library System for over 30 years. She became Library Administrator in 1998. She is a member of ALA, PLA and the Virginia Library Association. Prior to becoming Library Administrator she was head of Technical Services and then Support Services Manager for the Library System.



### Kate Werner (2005)

Media Services Manager at the Upper Arlington Public Library (Columbus, Ohio) since 2003.  
Circulation Manager at UAPL 1998-2003.  
Public Services Team Leader at Washington-Centerville Public Library (Dayton, Ohio) 1993-1998.  
BA History, Wittenberg University 1990  
MA History, University of Delaware 1992  
MLS Kent State University 1999



### Susan Raidy-Klein (2005)

Susan Raidy-Klein, was appointed Administrator of Library Services, Mary Baker Eddy Library for the Betterment of Humanity in 2004 after service as a researcher in the Library Archives. She earned her Master of Fine Arts from the University of Iowa Graduate Writers Workshop and her MLS from Simmons Graduate School of Library and Information Science. She is an independent scholar who has published and lectured extensively on the social, literary and political contributions of women in the United States.



### Joanne Noel (2005)

Electronic Resources Librarian, Indian and Northern Affairs Canada, Ottawa, Ontario  
A/Electronic Resources Librarian, Indian and Northern Affairs Canada March 2004 - present  
Research Librarian, Indian and Northern Affairs Canada 1998 - 2004  
High School Librarian, Ottawa-Carleton District School Board, Ottawa, Ontario 1997-98  
Manager, Mobile Libraries, Halifax Regional Library, Halifax, Nova Scotia 1996 - 1997  
Member of the VUG Executive Committee, 2003 - present  
Co-organizer of the Polar Libraries Colloquy, Ottawa, Ontario June 2004  
Past member of the Canadian Librarian Association, Ontario Library Association, and the Library Association of Ottawa-Hull.



### Past-Chair

#### Eddie Paul (2005)

Head: Bibliographic & Information Services, Jewish Public Library 2003- present  
Head of Technical Services, JPL 1995-2002  
Head: Cataloguing Recon team National Library of Canada (Ottawa) 1993-1995  
Serials / Reference Assistant, North York Reference Library (Toronto) 1994-1995

Interlibrary Loans, York University Libraries 1992-3  
Interlibrary Loans/Collections Assistant, McLennan Library (McGill University)



**Vital Links Editor / Webmaster**

**Bob Grattan (2005)**

BA English Randolph Macon College 1962

MA English University of Richmond 1965

MLS University of Texas at Austin 1975

Instructor of English as a Second Language, University of Petroleum and Minerals, Saudi Arabia 1965-67

Instructor of English/French Virginia Commonwealth University 1968-73

Director of Learning Resources (Parham Campus), J. Sargeant Reynolds Community College 1976-86

Senior Fulbright Lecturer, University of Tunis, Tunisia 1986 (library automation)

Director of the American Library in Paris 1986-1993

Systems Librarian, University of Mary Washington 1994—present

Membership: ALA + IIRRT, Fulbright Association