

**Volume 46, Number 1**  
**Fall 2008**

**Table of Contents**

President's Letter  
Daniel Lee

Editors' Letter  
Jennifer Burns & Heather Postill

Board Watch  
Joy Shanfield

Report From the Membership Chair  
Claire Lysnes

Upcoming Chapter Events

Report From The Toronto New Information Professionals (NIP) Program  
Laura Warner

People on the Move  
Frances Wong

A Tale of a Rookie Wiki Gardener (my first wiki contribution)  
Amra Porobic

Book Review: Business Cases for Info Pros  
Anita Frank

Bates InfoTip : Searchme.com  
Mary Ellen Bates

How to Adopt a Technology  
Peter de Jager

Vendors' Corner: DisclosureNet and Client Care - XPI Team Expansion

## President's Letter

Daniel Lee

Members and friends of SLA Toronto,

Welcome to the fourth issue of The Courier for 2008. The end of the year approaches and the holidays will soon be here. On behalf of the Chapter and the Executive let me extend my best wishes to you, your families and friends as you enjoy your winter holidays together.

As President, I set three goals for myself this year:

- \* to increase the Chapter's membership;
- \* to focus on the needs of students and new information professionals; and
- \* to continue our partnerships with non-library groups and associations.

As of July 2008 our membership hovers around 400 members - this is a mild increase from the total members we had when I became President in January 2008. SLA Toronto is fortunate to have a concentrated group of dedicated information professionals in the GTA (and beyond) and despite fluctuations in our membership numbers, SLA Toronto remains one of the largest and most vibrant Chapters in the Association.

When I first came to Toronto, I was welcomed by a small group of SLA members who encouraged me to get involved with the Chapter. How I got involved is a very easy story to tell, which is why I have continuously shared it with students and new information professionals in the hopes they will be inspired to take an active role in SLA.

One of the ways to get students involved in the Chapter is to make it as easy as possible for them to attend our meetings and to meet our members. The Student Sponsorship Fund was established this year to allow all students to attend SLA Toronto events for free. I am thrilled to report that the Chapter hosted 26 students at our events during the first half of the year. That's an average of four students per meeting. And we are looking forward to hosting many more students as the year wraps up. So far, there has been a tremendous response from the students who have attended our meetings; many of them had no idea what a special library was, but can now see themselves taking that path after graduation.

One of my goals, to continue our partnerships with non-library groups and associations, didn't work out quite as I had planned. It was difficult to find a non-library group who not only understood what we do, but was also interested in finding common ground to come together. Many professionals outside of the library world do not have a clear understanding of the value that we bring to our organizations and it can be difficult to explain that value to them in language they understand. This is one of the main reasons I am very excited about SLA's realignment project.

SLA Alignment Project

<http://www.sla.org/content/SLA/alignment/index.cfm>

In partnership with Fleishman-Hillard, Andy Hines of Social Technologies, and Outsell Inc., SLA has begun a thorough examination to bring clarity and unity to the core identity and values of the Association and the profession. This project will not only help refine our current positioning in the marketplace, but provide a framework for discussing the inherent value

in the profession and the Association in a clear, compelling and cohesive voice.

The results of this project will provide the Chapter with an excellent platform for developing relationships with professionals outside of the library community in the future.

As this is my last letter as President, I want to take this opportunity to thank everyone who has made this year a success. To the members of the Executive and Advisory Boards, I want to thank you for giving of your time and energy to provide the Chapter with excellent programming and opportunities to meet and interact with one another - be it virtually or in the real world. To you, the member, I want to thank you for being a member of this great association and for supporting us this year in our efforts to provide you with the best possible member experience at the local level.

Daniel P. Lee, MLIS  
President, SLA Toronto Chapter

## **Editors' Letter**

Jennifer Burns & Heather Postill

We have a rich harvest of SLA news and information to share with you in our Fall 2008 edition of The Courier!

Firstly, we want to offer our sincere congratulations to our President, Daniel Lee, who was elected to SLA's Board of Directors in early October. We wish him the best of luck in this new endeavour and are confident that he will serve the SLA membership well. Congratulations, Daniel!

Speaking of the SLA Board, Toronto Chapter President-Elect Joy Shanfield has provided a very informative report for this issue's BoardWatch column, which includes a letter from SLA CEO Janice Lachance about the importance of volunteers to our association. We would not be where we are today without the hard work and dedication of our volunteers. In addition, volunteering for SLA is a great way to contribute to our profession, learn new skills, and network with other professionals in the field. Find out how you can serve SLA and much more in the BoardWatch column!

If a leadership role is on your professional horizon, consider applying for Toronto Chapter sponsorship to attend the next Northern Exposure to Leadership Institute. This unique leadership development program for librarians in the first 2 to 7 years of their careers will be held in Emerald Lake, BC in late February 2009. See application details on page 9.

Read on for more information on upcoming SLA events, Chapter member news, past Solos co-chair Anna Porobic's adventures with wikis, and a very timely article from Peter de Jager on adopting new technology.

As always, we are looking for writers, occasional and regular, to contribute ideas, comments, thoughts, and news items. Share your experiences with your colleagues. Contact us directly any time for more information.

Enjoy!

Jennifer Burns

[burns.jennifer@sympatico.ca](mailto:burns.jennifer@sympatico.ca)

Heather Postill

[hpostill@sympatico.ca](mailto:hpostill@sympatico.ca)

Jennifer Burns

[burns.jennifer@sympatico.ca](mailto:burns.jennifer@sympatico.ca)

Heather Postill

[hpostill@sympatico.ca](mailto:hpostill@sympatico.ca)

## Board Watch

Joy Shanfield

### A Message from the Chief Executive Officer – Why Do People Volunteer?

This is the time of year when new officers are being elected and presidents- and chairs-elect are looking for those who will lead in appointed positions throughout 2009. Why not take a few minutes to reflect on the reasons people volunteer? It may make your job a bit easier.

The number one reason people volunteer is to contribute to a cause in which they believe or to give back to a profession that has helped them to excel. SLA falls within the latter. Who are those members who value SLA as a contributor to their success?

Eight out of 10 people want to put their skills and experience to use. What skills or abilities are needed for your chapter or division this next year?

Younger volunteers are more likely than any other age group to volunteer to improve their job opportunities or explore their own strengths. SLA offers training and a supportive network of volunteer leaders. Why not present the “volunteer jobs” you need to accomplish as career development?

People say they don't have enough time to volunteer. What are some alternative ways of involving people in smaller projects? Examine position descriptions and be creative.

Most people don't volunteer because they were not personally invited. Do you make an extra effort to invite people to join your chapter or division? Do you express to them that you need their particular assistance and ask them to join your leadership team?

SLA, like many associations, has a core group of volunteers who contribute year after year a majority of the volunteer hours. What measures are you taking to attract new volunteers and avoid volunteer burnout?

President-Elect Gloria Zamora has posted a call for volunteers (<http://www.sla.org/content/community/committe/volunteer.cfm>). We'll let you know of anyone expressing an interest in serving at the unit level. Look at this as a model and create your own call for volunteers. This outlines your units' needs and might identify someone you didn't know would have an interest in volunteering.

2009 also presents a once-in-a-lifetime opportunity for many members to take on unique volunteer opportunities to celebrate our centennial and get involved with SLA's alignment for the future. Look forward to more details. A little thought now will prepare you to have your leadership team in place in January.

--- Janice R. Lachance

### 2009 Board of Directors Election Results

Still haven't heard who won the election? Find out now at

<http://www.sla.org/content/SLA/pressroom/pressrelease/08pr/pr2818.cfm>! "I would like to express my gratitude to all of the 2009 candidates for taking the time and stepping up to the plate to run for election. Each candidate on the slate clearly deserved to be nominated, and I am sure that we will continue to hear from these SLA stars as they continue to serve the association with distinction in various other leadership roles," said SLA CEO Janice Lachance. "I'd like to congratulate the new board members and offer them my gratitude in advance of their service. SLA's success is based in the strength, dedication and intellect of our members around the world, and the sweat equity of our volunteers at all levels of the organization. Year after year, I continue to be amazed at the dedication and commitment I see from our leaders who work so hard to be a part of shaping the future of this organization and the information profession. Their leadership and service allow SLA to grow and flourish. We couldn't do it without them!"

Read more from CEO Janice Lachance's blog *Executive Connections* at [http://slaconnections.typepad.com/executive\\_connections/](http://slaconnections.typepad.com/executive_connections/).

### SLA 2008 Conference Handouts

In cooperation with a number of the SLA Divisions we are pleased to provide access to conference handouts and presentations provided by those divisions. It should be noted that not all sessions lend themselves to this format, nor do all units of the association offer this service. The available handouts are Online at Click U for no charge.

Learn more at <http://sla.learn.com/learncenter.asp?page=311>

### **I spy an "Info Site"**

Did you know that you can find the archives of IO's Info Sites column in the Resources section of SLA's website (<http://www.sla.org/content/resources/inforesour/webclick.cfm>)? The archives go back to October 2004, when the column debuted in *Information Outlook*. A member login is required to access the columns.

If you have suggestions for sites to include, email us at [resources@sla.org](mailto:resources@sla.org).

### **US Border Policy Allows for Search of Data-Storing Devices**

A U.S. border security policy

([http://www.cbp.gov/linkhandler/cgov/travel/admissibility/search\\_authority.ctt/search\\_authority.pdf](http://www.cbp.gov/linkhandler/cgov/travel/admissibility/search_authority.ctt/search_authority.pdf)) allows agents of the US Customs and Border Patrol (<http://www.cbp.gov/>) to search and confiscate computers, phones, personal digital assistants, cameras, digital music players and other data-storing devices.

An article from the Canadian Bar Association (CBA) PracticeLink has suggested 10 steps you can take to shield sensitive information, like that protected by solicitor-client privilege, when crossing the border.

Read CBA PracticeLink article at <http://www.cba.org/cba/PracticeLink/TAYP/laptopborder.aspx>

### **Canadian Copyright Bill Dies on the Table**

([http://slaconnections.typepad.com/public\\_policy\\_blog/2008/09/canadian-copyri.html](http://slaconnections.typepad.com/public_policy_blog/2008/09/canadian-copyri.html))

**Bill C-61** (<http://www2.parl.gc.ca/HousePublications/Publication.aspx?DocId=3570473&Mode=1&Language=E>), An Act to amend the Canadian Copyright Act, was tabled during the second session of the 39th Canadian Parliament by Minister of Industry Jim Prentice. The bill purported to balance the rights of copyright holders and consumers. The bill died on the table when the 39th Parliament was dissolved prematurely and an election was called by the Governor General Michaëlle Jean at Prime Minister Stephen Harper's request on 7 September 2008. The bill would have prohibited the unlocking of digital locks on content such as software, digitized music, digitized books and other protected subject matter, even for the purpose of exercising user rights recognized in the Copyright Act.

Read related news story at <http://www.canada.com/ottawacitizen/news/story.html?id=9f26e609-2516-4002-90bb-f07f77a9bdd6>.

In July 2008, SLA blogged on the introduction of Bill C-61 and provided links to the Canadian Association of Research Libraries' (CARL) statement entitled "A Canadian Approach to Digital Copyright" ([http://www.carl-abrc.ca/projects/copyright/CARL\\_digitalcopyright\\_statement-Jan2008-e.pdf](http://www.carl-abrc.ca/projects/copyright/CARL_digitalcopyright_statement-Jan2008-e.pdf)). A key element of that statement was that "to compete nationally and internationally, researchers in Canada require a fair and balanced copyright regime that recognizes the importance of users' rights. Users' rights must not be limited or narrowed in the digital environment."

### **Organizations in Strong Support of NIH Public Access Policy**

([http://slaconnections.typepad.com/public\\_policy\\_blog/2008/09/organizations-i.html](http://slaconnections.typepad.com/public_policy_blog/2008/09/organizations-i.html))

SLA and others sent letters to all members of the Subcommittee on Courts, the Internet, and Intellectual Property and the Committee on Judiciary expressing long-standing and strong support for the National Institutes of Health (NIH) Public Access Policy and opposing any change to the current Policy that would undermine its proven effectiveness.

The Subcommittee will be conducting a hearing on the NIH Public Access Policy, a hearing that SLA and others strongly hope will provide an opportunity to better understand the importance and strategic value of the Policy as it advances science, improves access by the public to federally funded research, provides for effective archiving strategies for these resources, and ensures accountability of our federal investment.

Read the letter at <http://www.sla.org/pdfs/publicpolicy/090508NIH.pdf>.

**Open Access Handbook Published** ([http://slaconnections.typepad.com/public\\_policy\\_blog/2008/07/open-access-han.html](http://slaconnections.typepad.com/public_policy_blog/2008/07/open-access-han.html))

The English version of a handbook, entitled *Open Access: Opportunities and Challenges*, a joint publication of the European Commission and the German Commission for UNESCO, 2008, has been published.

The publication is available in print and electronic version. The handbook aims to provide information about the opportunities and challenges offered by Open Access ([http://en.wikipedia.org/wiki/Open\\_access](http://en.wikipedia.org/wiki/Open_access)), and to present a wide array of issues and positions under debate.

The English version of the handbook is a translation of the handbook in German, published by the German Commission for UNESCO in 2007.

Download the Handbook from

[http://www.unesco.de/fileadmin/medien/Dokumente/Kommunikation/Handbook\\_Open\\_Access\\_English.pdf](http://www.unesco.de/fileadmin/medien/Dokumente/Kommunikation/Handbook_Open_Access_English.pdf).

Read more details about the book at <http://www.unesco.de/openaccess-en.html>.

## **Report From the Membership Chair**

Claire Lysnes

### **Welcome to our New Members!**

Please join me in welcoming the following information professionals who joined the SLA Toronto Chapter between May and September 2008:

Angie An	Toronto
Margaret Campbell	Ridgetown
Paul Klages	London
Arvind Mehta	Toronto
Michelle Michiels	Toronto
Amalia Roskies	Toronto
Todd Vasey	North York

I look forward to meeting each of you at a future SLA Toronto event!

Claire Lysnes  
SLA Toronto Chapter Membership Chair  
[clysnes@gmail.com](mailto:clysnes@gmail.com)

## **Upcoming Chapter Events**

Here are some of the upcoming events presented by SLA Toronto Chapter. See the Toronto chapter website for details. (<http://www.sla.org/chapter/ctor/>).

### **SLA Toronto Chapter Annual General Meeting**

November 12, 2008

5:30 PM (registration), 6:00 PM - 8:00 PM (event)

One Up Restaurant and Lounge (<http://www.oneup.ca/>)

130 Dundas St. West

Toronto ON

SLA Toronto Chapter is holding its AGM in November this year to report on its 2008 year and elect its Executive Board for the 2009 year.

### **SLA / CASLIS Joint Holiday Social**

December 3, 2008

5:30 PM (registration), 6:00 PM - 9:00 PM (event)

Arts & Letters Club of Toronto, 14 Elm Street (Elm & Yonge, 2 blocks north of Dundas W)

You are invited to attend our annual holiday celebration with your library friends in The Great Hall at The Arts and Letters Club of Toronto.

## SLA Toronto Grant to Attend Tenth Northern Exposure to Leadership Institute

SLA Toronto is pleased to announce its decision to again sponsor a qualified candidate for the upcoming tenth Northern Exposure to Leadership Institute, to be held February 26th to March 3rd, 2009 in Emerald Lake, British Columbia.

\*\*\*Deadline for application package submission to SLA Toronto is November 11th, 2008\*\*\*

This year, the Toronto Chapter will be sponsoring one nominee after reviewing qualified applicants. Sponsorship will include a \$1500 grant from the Chapter to cover the registration fee and offset transportation costs to and from Calgary, Alberta.

The Chapter requires that the nominees meet the criteria established by the Institute as well as be a member of the Toronto Chapter. (Please see the Institute's website for [nomination criteria](#).) The successful nominee will also agree to serve on the Executive Board of the Chapter within one year of attending the Institute as well as report on the experience of attending in the Courier. Nomination by SLA Toronto does not guarantee admission to the Institute.

The deadline for submission for consideration of the Chapter grant is November 11th, 2008.

Nominees shall send to SLA Toronto a completed [nomination package](#), as detailed on the Institute's website. Please e-mail or fax application packages to Claire Lysnes at [cllysnes@gmail.com](mailto:cllysnes@gmail.com) or (416) 814-8902, with originals to follow by mail to:

Claire Lysnes  
SLA Toronto  
c/o  
PwC Management Services LP  
145 King Street West, 11th Floor  
Toronto, ON Canada M5H 1V8

More information on Northern Exposure to Leadership may be found in the Press Release below and by reading:  
[The 6th Northern Exposure to Leadership Institute: Part 1: What is NELI?](#)  
By Dave Hook and Tracey Palmer

[The 6th Northern Exposure to Leadership Institute: Part 2: The Experience](#)  
By Dave Hook and Tracey Palmer

[Northern Exposure to Leadership Institute](#)  
By Daniel P. Lee

\*\*\*\*\*

### NELI Press Release

September 29, 2008

The tenth Northern Exposure to Leadership Institute (NELI) will be held in Emerald Lake, British Columbia, from February 26th to March 3rd, 2009.

The Institute's mission is to assist professional librarians to develop, strengthen, and exercise their leadership skills so that they may be better equipped to formulate, articulate, and achieve the future changes required by libraries into the 21st century.

Based on the premise of experiential learning, the Institute includes group and individual exercises, as well as the opportunity to learn in conversation with mentors, who have been chosen for their own leadership skills, and who will be participating as volunteers.

Northern Exposure will target 24 librarians who have a desire to develop their leadership potential, received their library degrees generally within the past seven years, and a minimum of two year's professional library experience.

Individual nominations will be welcomed from a variety of sources, including employers, associations, library schools and the corporate information sector. Nominees will be asked to supply a one-page resume, a one-page synopsis of

achievements, career goals, and expectations for the Institute, as well as a one-page description, employer or nominator validated, of a leadership opportunity to be made available to the nominee in the year subsequent to the Institute. Those chosen as participants must secure funding to cover a registration fee and transportation costs to Calgary. Meals, accommodation, as well as the programme and learning materials will be provided.

See <http://www.ls.ualberta.ca/neli/index.html> for 'Description' and 'Nomination Criteria'.

Nominations must be received by November 30, 2008.

For more information contact:

Ernie Ingles,  
Executive Director,  
Northern Exposure to Leadership Institute,  
c/o 5-07 Cameron Library,  
University of Alberta,  
Edmonton, Alberta,  
Canada, T6G 2J8

Tel: 780-492-5170  
Fax: 780-492-7925  
Email: [ernie.ingles@ualberta.ca](mailto:ernie.ingles@ualberta.ca)

---

NELI mailing list  
[NELI@mailman.srv.ualberta.ca](mailto:NELI@mailman.srv.ualberta.ca)  
<http://www.mailman.srv.ualberta.ca/mailman/listinfo/neli>

## **Report From The Toronto New Information Professionals (NIP) Program**

Laura Warner

### **Upcoming Event: Networking Mixer and Social**

The New Information Professionals Group will be wrapping up 2008 with another great social in November. This time, we're going to spice it up a bit.

Have you ever wondered exactly what somebody did in their position? Saw them at a speaking event or a social, but never had a chance to go into detail? Ever wonder what it is like to work as a corporate librarian, a media librarian or a subject specialist? Well, now is your chance to find out. I'll be sending out a request prior to the social, asking participants to submit a brief professional synopsis of themselves; including information such as their position, job description and any other professional contributions. Still a student? Super – tell us about your experience and your professional goals for the future.

All NIP member attendees will get a succinct introduction to the other participants, broadening their knowledge of what positions are out there, while casually socializing with friends and colleagues.

The mixer is taking place this November. The venue and date will be announced within the next week via the SLA Toronto listserv and the SLA – New Information Professionals Facebook Group. I look forward to seeing you!

Thank you for making this year's events so much fun!

*Laura Warner is a graduate of Dalhousie University's MLIS/MPA program and is a Reference Librarian for the CBC.*

## People on the Move

Frances Wong

**Claire Lysnes** has been promoted to the position of Portal Manager at PricewaterhouseCoopers Canada. The Portal is PwC Canada's intranet which serves over 5,000 partners and staff. In addition, she is currently managing a project to introduce the firm to enterprise RSS technology via a 200 person proof-of-concept pilot this fall. Claire continues to be a member of the Canadian firm's Knowledge Management Group, as well as the University of Toronto Faculty of Information Alumni Association President and the SLA Toronto Chapter Membership Chair.

In June, **Kimberly Silk**, President, BrightSail Strategic Marketing, began a contract with The Martin Prosperity Institute at the Rotman School of Management, University of Toronto, to build an online research repository and collaboration system to support their researchers. She will be with the MPI until the end of December 2008.

In August, **Melanie Browne** changed jobs. She was previously an information specialist at Mount Sinai Hospital, Toronto and has now moved to be a Librarian / Project Manager for Maple Leaf Foods Corporate, Toronto, ON. Her new email is [BrowneMG@Mapleleaf.ca](mailto:BrowneMG@Mapleleaf.ca) and her telephone number is 416-926-2058.

Information and research services at CIBC have undergone a major transformation over the past eight months. The centralized Research Network team was disbanded, and a new service model initiated, impacting a number of Toronto Chapter members. Continuing in their roles of providing in-depth research support, **Donna Smith-Roselle**, Petra Gibb-Neale and **Silvia Franzoi** moved into major business areas, as embedded researchers. **Alma Lambio** (and her role of vendor support and liaison) was transitioned to the centralized Market Data Services group. **Jennifer Bennett** transitioned into a new role of contract manager, remaining within Corporate Training & Development. Philomena Pun is now enjoying early retirement. **Sara Chi** has joined CriticalKnowledge (a consulting firm based in New York and Toronto) in a new position as researcher/project manager, and **Mary Lou Parkinson** is actively exploring new research and analysis opportunities. **Cynthea Penman** has been managing the transition, including: establishing outsourced research contracts for non-supported business areas; realigning information product ownership; website redesign, etc., and will be leaving CIBC in December. This is the end of an era at CIBC, mirroring changes happening across the information industry, and offering new and interesting opportunities for all concerned. You can contact Cynthea at [cynthea.penman@cibc.com](mailto:cynthea.penman@cibc.com) or [cynthea.penman@live.com](mailto:cynthea.penman@live.com)

*People on the Move will be a regular column highlighting the achievements of our members and help keep us all in touch. Please share your career changes, retirements, life changes, volunteer work.*

Submit your news to Frances Wong at [FWong@blqcanada.com](mailto:FWong@blqcanada.com).

## A Tale of a Rookie Wiki Gardener (my first wiki contribution)

Amra Porobic

One of my first tasks as SLA Toronto Solo Group Chair was to create content on solo librarians for the SLA Toronto Best Practices wiki. As a starting point, I was given the New Information Professionals wiki (from which I couldn't steal too much). It took me quite a while to figure out what other wiki pages flourish under the Chapters' sky.

At first, the assignment seemed insurmountable. So many "landscapes" to review, so many steps to learn, and so little time in the packed workday schedule of a solo librarian! Fortunately, there were no deadlines, and the time factor was further eased by the extra-help of a summer assistant in my library. Being a solo librarian for the past 10 years (and past Solo Co-Chair) was the only strength I had against the initial impediment of adding "best practices" with no practice with wikis at all.

After many hours of exploring the web and visiting numerous wiki gardens, I took a better look at the SLA wiki space, which led me into "23 Things". One of those 23 things was, sure enough, wikis. What a great way to learn new tools! This was an excellent opportunity to try applying wiki instructions from the Week 7 session (<http://wiki.sla.org/display/23Things/Week+7+Wikis+-+Collaborative+Portals>) to my practical task. Of course, I realized pretty soon that my wiki couldn't have many of those great features, but I was not going to complain. I preferred the idea of a minimalist wiki garden.

Another aspect of my preliminary research covered solo librarians' presence on the internet, through library associations' websites, individual blogs and wikis. I noticed that too many pages were desperately out of date, which made me wonder: if others can't keep up, HOW WILL I be able to "cultivate" this wiki garden? I must keep it simple.

When I felt I had enough gathered material and ideas to build the wiki, I started writing the introduction text, mission statement, backgrounders and history. The biggest challenge was how to offer enough relevant content without repeating what's already been said somewhere else. For each section I would throw as much material as I had and later on I would work on "trimming" and "weeding" the material.

For the history section, I obtained evidence about the first, very enthusiastic steps of the One-Person Library Support Group, and personally met with the first Toronto Solo Chair, Penny Lipman. I also reviewed previous issues of the in Courier to "unearth" earlier reports on solos' work. Solo survey was another big endeavor I was doing on the side, so I used it to create some unique content for the wiki.

Applying the Text Formatting Rules to the prepared text was my next step. The rules were pretty basic, although without WYSIWYG. I had to learn what characters to use for bold text, headlines, lists. One of the first things I tried was making a link to an external page. I also needed to come up with clear titles and avoid playing too much with formats, bullets and colours because "a Wiki is not about presentation but more about quality content" (same as above). Only when I saw the content alive did I start getting ideas about improving the organization and the page structure. What followed were numerous re-writings of the content until it all made some sense visually and structurally. (Amidst of all this editing, the Chapters' website was down on several occasions, so I almost thought I was a culprit, because each time I changed something, the site would be down for the day!)

When the wiki seemed ready for a preview, I shared it with solos and a few friends. I got some positive feedback and a few helpful suggestions. This is when it became clear to me that this wiki was aimed at the Chapter's volunteers, and not members at-large. (Ta-daaa!) Over the next three weeks I had dozens of edited versions and numerous ornamental changes. With wikis, it's never too late to make it right!

The SLA Click U Live Seminar *Best Practices for Setting Up Wikis* (<http://www.sla.org/PDFs/clicku/2008/CUL091108.pdf>, September 11, 2008<sup>(1)</sup>) opened some new horizons and put my work on wikis in a different perspective.

- I could see how current wiki design and syntax lacks flexibility, allows no customization and no comments.
- Wikis are all about cooperation and here I was, the only contributor. (But, on a positive side, I didn't have to worry about someone re-writing my sentences).
- Wikis are not discussion-management tools, nor forums. This is why I dropped the idea of having a section Solos Ask Solos, suggested by some folks.

Luckily, the current Chapters' wikis will be moving to the SLA wiki space platform, so hopefully, this will mean better customization and more flexibility in the future.

Some of the benefits I experienced with this wiki include:

- Sharing handouts and material for the solo meetings prior to the meeting
- Sharing reports of the meeting for those who couldn't participate
- Sharing a link for solo survey and posting the results later on
- Contacts in Solos' Directory easily updated and not lost in someone's personal Inbox
- One week's UPCOMING EVENTS section becomes next week's PAST EVENTS' report (i.e. content evolves constantly, or as needed).

Some of the lessons learned are:

- Have the mission and the audience of your wiki clearly defined before you start
- Inspect all the surrounding environment of your wiki early
- Less is better
- Do not get attached to your content – some parts will have to be deleted in order to let wiki grow
- Keep checking the content regularly and keep exploring new ideas

In helping this wiki grow, I'd like to throw in a few "trees": for example, *Guidelines for Solo Chairs* could be a useful tool for future volunteers. The other exciting challenges for this wiki could be how to enforce collaboration and how to motivate more solos to become wiki gardeners. Bring on some ideas!

---

## Resources

About Library Success: A Best Practices Wiki

<http://www.libsuccess.org/index.php?title=Wikis>

23 Things – Week 7

<http://wiki.sla.org/display/23Things/Week+7+Wikis+-+Collaborative+Portals>

<sup>(1)</sup> The seminar is available for 89.00 USD via SLA Click U program:

<http://sla.learn.com/learncenter.asp?id=178409&sessionid=3-3BDF9B58-838A-4732-B7F7-DBEB14635AEB&mode=show&page=38>

## **Book Review: Business Cases for Info Pros**

Anita Frank

Business Cases for Info Pros: Here's Why, Here's How

By Ulla de Stricker

*"Too many good ideas are not funded because a compelling case is not made for them. Ulla de Stricker provides a clear, concise, and straightforward approach to building your successful business case."*

—Dr. Ken Haycock, Professor and Director  
San Jose School of Library and Information Science

Dr. Ken Haycock's comment sums up Ulla's book very well.

Ulla's vast experience in the library and knowledge industry shines through in this step-by step book. It is a must-have tool for those in the industry who have business cases to create and would even be suitable for those working on creating business cases in any field.

To go one step further, Ulla's book provides information for the novice manager and provides an informational framework similar to what one learns in business school.

Since businesses find it difficult to agree to projects without quantitative support, the information managers often find themselves in a bind, as ROI for information and knowledge based projects are difficult to measure and the business case even more difficult to sell.

Ulla discusses an overall approach that responds to management's need to know "What's in it for me?"

In the book Ulla covers off everything that one needs to do a business case: from defining what is a business case, to the overall process of writing including all prework such as how to prepare, where to get content or find the info you need, format and language to use.

Fully supported at every stage with examples and case studies, the book supplies both the understanding and the tools to put forth your case and get it accepted by management.

Some of the chapters included are:

The Decision Making Context

Thinking About Money

The Business Case Approach

The Business Case Framework

The Business Case Memorandum

Case Studies

Presenting the Message in Person

Appearance Matters

In sum, worth every penny! The book is available from the publisher – it's easiest to go to [www.destricker.com](http://www.destricker.com) and follow the link there.

## **Bates InfoTip : Searchme.com**

Mary Ellen Bates

Searchme is an intriguing new attempt to make web research more like how we look for information in (gasp!) print resources. Its search results page is insanely intuitive, highly visual and yet easy for us text-oriented folks to use. Solely in terms of user-friendliness, Searchme is one of the best search engines I've seen. It also does a surprisingly good job at clustering results, and it has a nice feature for easily sharing web pages with others. Note that this site is in public beta, meaning that it is not in its final version, and some features and functions may change without notice. And it has indexed "merely" one billion pages, so it's working with a significantly smaller index than, say, Google, which hit the one-billion-page mark way back in 2000.

You will notice the differences of Searchme as soon as you type in your search query. There is no "Search" button to click to initiate the search; Searchme starts finding and categorizing results as soon as you start typing. Type the letters S U and N, for example, and small icons appear below the search box with categories such as astronomy, astrology, computer programming, stocks, global warming and so on. Searchme has started retrieving results, sorting them on the fly, and presenting you with ways to slice and dice the results. (There is also a "Search All" icon, if you want to see all the results.) Different queries will have different categories – a search for "oil shale", for example, generates results sorted in categories for geology, business news, mining, US government, alternative vehicle fuels, and so on.

What is particularly impressive is the search results page. Think of holding a hand of cards – you see one card fully and the other cards in slices. Searchme's search results page looks somewhat similar. In the middle of the page is an image of the first retrieved web page, with your search words highlighted. On the right is a smaller image of the next result. Drag that to the middle of the screen and the first page shuffles off to the left and a fresh page appears on the right. Double-click any image and you are taken directly to that page, either in the same window or, if you change your preferences, in a fresh window or tab.

Unlike most search engines, Searchme does not limit the number of pages from a web site displayed in search results. For example, nine out of the first ten search results from the "computer programming" stack of my "sun" search were from the Sun Microsystems web site.

Searchme also supports a page-sharing feature, called a "stack". If you see a web page you want to save and share with others, simply drag it to the "Stacks" link in the upper right corner of the search results page. (And notice the cool animation of the page as you pick it up and drag it over to the stack.) You can build multiple stacks; each has its own name and settings. And you can directly add pages to a stack by clicking an icon and typing (or pasting) in a URL, title and description. You can share a stack with others in several ways – emailing the URL of the stack, inserting the URL in a blog entry, or sharing it in Digg, Reddit, del.icio.us, Twitter or MySpace. See <http://www.searchme.com/stack/5728> for an example of a Searchme stack of pages on Sun Microsystems. Note that, while not listed in a public spot, stacks are not strictly private; anyone who has the URL can view the stack.

Searchme is also collecting stacks on less serious topics. There is a chimney stack (<http://www.searchme.com/stack/5512>) and a pancake stack (<http://www.searchme.com/stack/551b>).

My only real gripe is that, as of right now, Searchme has no help file or advanced search feature; I'm hoping that these are developed before Searchme graduates out of beta.

*This tip is reproduced with permission from Bates Information Services ([www.BatesInfo.com/tip.html](http://www.BatesInfo.com/tip.html)). Check out Mary Ellen's personal blog, Librarian of Fortune ([www.LibrarianOfFortune.com](http://www.LibrarianOfFortune.com))*

## How to Adopt a Technology

Peter de Jager

It's ubiquitous, (and it's everywhere as well) and some would have you believe that if you're not using the latest and greatest product, then you're falling behind. This "you're not keeping up" sales pitch is very effective at striking at the heart of our insecurities; am I falling behind? Will I lose out if I don't buy this stuff? Don't the ads claim that they'll make me more productive, more efficient, and even more attractive to the opposite sex? How could I possibly live without it? Here's my credit card.

Before attempting to answer the question, "How should we go about adopting a new technology or product?" we first have to have a clear definition of what it is we're trying to accomplish. To decide what product we're going to use to improve our organization, we need to embrace a strategy more reliable than submissively accepting the carefully chosen blather of the wordsmiths who wrote the glossy ads.

What problem are we trying to fix? What specifically do we want the technology to do? Better yet, since "technology" by itself doesn't do anything, how exactly are we going to use this technology to change an existing process? To put this advice into concrete terms, how exactly will the work of department 'X' change because of the technology purchase we're contemplating? And finally, in excruciating detail, what benefit do we expect to reap from our investment?

If that sounds like a lot of intensive work, it is, and it's necessary work, unless you wish to add your organization to the long, and still growing, list of embarrassing examples of how we shouldn't implement technology.

Once you've done all of the above, then and only then are you ready to start looking at what's available.

**Phase 1.0:** Advertisements and articles from your trade publications will provide you your first truckload of information. Read everything you can lay your hands on. Create, and maintain a research file. Keep in mind that all of the advertisements and most of the articles will paint the rosier of pictures. According to most of what you read, everything works as intended, it's as effective as was promised and the tooth fairy will visit you tonight while you sleep.

At this point, every product claiming to address your problem is a possible candidate.

**Phase 2.0:** Put on a large pot of your favorite brew and head to the internet. The websites associated with the products you're researching will provide details beyond what they decided to put into the ads. Use this information to connect what they claim to do, with what you need them to do. From your perspective, every claim is an unproven assumption. The more you need a specific function, the more you must verify the company's claim that they can deliver the functionality.

By now, you've rejected at least a few of the products you found earlier. You've made some progress, not much, but some.

**Phase 3.0:** Get another pot of that brew, and back to the internet. This stage is incredibly informative, even entertaining. You want to track down the discussion groups where users of the products are talking about the real world functionality of the product, the actual delivered service, their pet peeves, the new, next and previous releases, the known bugs, problems, anomalies and their general experiences. You'll find some of these discussion groups on the product sites, others you'll have to search for, a good place to start are the discussion groups of your industry associations.

If you don't see the answers to the question unique to your organization then post those questions and wait for the results. It's important to remember, if you decide to purchase a particular product, then there are dozens, if not thousands of existing users all with more experience than yourself. These existing users represent a goldmine of experience, of use to you only if you ask for the information you need. Don't be shy, most people are more than happy to answer your questions.

After reading just a few product discussions, you'll have quickly trimmed your list down to a more manageable size.

**Phase 4.0:** Put a call out to your existing associates, do any of them use the products you have your eye on? If so, it's time to get on the phone and arrange a meeting. If they have the time, spend an afternoon with them; see how they're using the product. What problems have they encountered, what benefits have they gained? The assumption here is that you already trust their opinion. If you have the time, attend an industry conference and buttonhole anyone who uses what you might decide to use.

Have you noticed we've not even spoken to the vendor yet? By now you should have only a handful of products in mind.

**Phase 4.9:** Buy some insurance. I don't mean life insurance or accident insurance; I mean something a bit more peculiar. Rent yourself a technical consultant who knows far more about technology in general and perhaps this product category in particular, than you'll ever need to know. They're your hired gun; they'll accompany you to vendor meetings and demos.

Their role? Just by introducing who they are and then sitting quietly in the back of the room they're going to keep the vendor honest. If necessary, they'll ask the relevant 'hard' technology questions, they'll ensure that the demos presented to you are 'real' and not simulations of what the product might do someday.

They'll also ensure that the questions you're receiving to your questions are accurate. They'll do that just by being in the room, but again they're your technical backup, ready to jump into the fray conversation if there's something missing or unclear in the answers given to you.

This type of companion is a vendor's worst nightmare in any demonstration, that alone justifies having them along for the ride. Life is fun; enjoy it while you're here.

**Phase 5.0:** See the demos of the products on your short list. Narrow that list even further, and then make no commitment until you've had the chance to experiment with a pilot project, using your data, your people, and your environment. Does it work the way you expected? Are you getting the benefits you hoped for?

**Phase 6.0:** There is obviously a technical component to your search. Will the product you're purchasing operate within the context of your existing infrastructure? If not, what gaps need filling? Will it handle the expected workload? What about the unexpected, but reasonably likely spikes in that workload? Will you be able to operate and maintain this product with existing skill sets? Or will you need to hire experts? How available are these experts and at what cost?

You might have gathered the answers to all of these technical details in earlier phases, or you might not. The most likely place to verify the technical details is in Phase 5.0, nothing is more effective at weeding out problems than trying to actually implement a pilot project. What is important is that they all get answered before you sign on that dotted line.

Congratulations, you've selected a new technology, all you have to do now is 'implement' it, but that's another story.

*(c) 2008 Peter de Jager - Peter is a Keynote Speaker, writer and consultant focusing on issues relating to Change Management and the Future. You can contact him at [pdejager@technobility.com](mailto:pdejager@technobility.com) and visit him at [www.technobility.com](http://www.technobility.com)*

## Vendors' Corner: DisclosureNet and Client Care - XPI Team Expansion

XPI Inc., the provider of DisclosureNet has recently expanded its front line team to include two librarians; Erin Murphy and Richard Dubé joined XPI during Fall, 2007. Since then, they have been busy providing the highest level of client care and training support to the company's numerous clients. With many years of work experience in one of Canada's premier law firms, the librarians have refined their delivery of client support through the utilization of latest technologies and desk-top products, combined with an efficiency of research processes. They remain deeply committed to their librarian values, and apply them every day as they provide training and support for the efficient use of DisclosureNet. As clients' proficiency with DisclosureNet increases, so does their productivity. Erin and Richard ensure the success of the learning experience for clients of XPI through their approach to training and user support, which is connected to the way law/business practitioners and librarians work with information through product selection and deployment, and in-depth research techniques. Richard has observed ... "In many ways, our client groups have expanded from one national law firm to the entire Canadian business market." In this context, the transition into their new roles has been very natural and seamless.

Erin Murphy has a MIST degree from the Faculty of Information Studies, University of Toronto. In her new role as Client Support and Training Specialist, Erin oversees a suite of training programs; as well, she develops state-of-the-art training materials specific to business and industry research and areas of law practice, including a student training module, which effectively teaches core concepts of disclosure research using simple and relevant search examples.

Richard Dubé has a MLS degree from the Faculty of Library Science, University of Toronto. He has been a law librarian for close to 30 years. Richard's past work opportunities have placed him in a public utility corporate environment, as well as law school, law firm and legislative library settings. He has directed library and KM related projects over his years of practice, and brings a specialized expertise to the role of Client Care Director with XPI.

The librarians first worked with DisclosureNet when they introduced the platform to the desktop work environment of their former employer. It turned out to be the most popular and successful digital resource ever and was immediately adopted by legal, marketing and business personnel as their most frequently used research product.

DisclosureNet is a powerful, easy-to-use, online solution that assists corporate financial professionals, accountants, lawyers and institutional investors with the research and preparation of disclosure documents filed by publicly traded companies. By allowing users to perform targeted searches on millions of disclosure documents filed with SEDAR, SEDI and EDGAR, users are able to quickly retrieve relevant information on a wide variety of topics relating to note disclosure, reporting requirements, governance issues and Sarbanes-Oxley applications. Full-text searching, real-time alerts, document comparisons, and language translations are just some of the features provided by DisclosureNet.

DisclosureNet has wide-spread adoption in the Canadian investment, legal, accounting, government, regulatory, corporate and shareholder markets. For more information, please visit [www.disclosurenet.com](http://www.disclosurenet.com).