Principles for Implementing the UC Consortial Borrowing System Software
June, 2002

Purpose:
- To guide decisions which must be made during the implementation process
- To establish values which will raise the quality of services
- To inform outreach and instructional activities

Strategies:
Initially, the processing flow established for requests in the VDX system will be as much like the current processing flow as possible. The Request Team, with assistance from the Resource Sharing Committee and campus ILL staff, will guide planning for the modification or expansion of interlibrary loan and borrowing request processing through the UC VDX system, and particularly to explore options for providing fee-based, local campus, document delivery services. Automatic exchange of requests between the UC VDX system and other remote systems other than OCLC and DOCLINE has broad ramifications and will require extensive discussion at a variety of levels before being implemented.

Principles:
The overarching principle that motivates the extensive collaboration for the Request service and the CBS is the one-university, one-library vision as supported by the strategies of systemwide resource sharing, CDL technical support, and campus co-investment. The CBS software will be structured so that it takes advantage of the benefits gained from a centrally managed system. The Request Project Team recommends that the following principles be followed during implementation.

- Each ILL lending and/or borrowing unit will be able to adapt the VDX system configurations to meet the needs of their own processing procedures. Locations will be established for units that are delivery only, but staff at these locations will not be able to make use of full system capabilities
- The lender name and address file will be shared
- The system will integrate desktop delivery procedures
- Initially, the only remote system with which the CDL VDX system will communicate is OCLC; once DOCLINE ISO ILL communication is available, that system will be added
- The system will use the CDL’s Request patron authentication mechanism, which directly queries the campus circulation systems, to verify patrons for accessing information about the status of their requests
- The system will use the Z39.50 protocol for obtaining location and availability information from campus circulation systems

Implementation will include education, usability, and evaluation activities in the pursuit of continuous improvement of CBS functionality and systemwide ILL services
- In accordance with the co-library concept, implementation will strive toward a uniform user experience
- The amount of custom work required by CDL will be minimized
• Output of UC-wide and campus level statistics on interlibrary activity will be a priority for the system

• CDL will provide technical support for those ILL units needing assistance in adapting VDX to their work flows