

Resource Sharing Committee – Interlibrary Loan Advisory Group  
Annual Report, FY 2006-2007  
Submitted by Gary Johnson, Chair, RSC-IAG

As an all-campus group reporting to the Resource Sharing Committee (RSC), the Interlibrary Loan Advisory Group (IAG) is charged with developing and investigating ways to improve interlibrary loan and document delivery services on all campuses by taking an active leadership role and promoting communication and cooperation between UC ILL units and other groups as appropriate.

Mindful of its charge, IAG has focused on improving cooperative resource sharing within UC and with the global resource sharing community in which it is embedded. The following is a list of the broader issues acted on by IAG in FY 2006-2007.

- 1. IAG Website:** The policies and contact information sections of the Directory of ILL Units were updated in Spring/Summer 2007.
- 2. UC Manual of ILL Policies and Procedures:** IAG approved revisions to the Shared Access to Special Collections Guidelines and added these changes to the IAG website.
- 3. UC – CSU Direct Borrowing Investigation:** IAG identified the operational issues surrounding peer-to-peer resource sharing with the California State Universities. The investigation revealed operational issues in four areas: 1) loan periods, 2) Tricor delivery, 3) technical issues, and 4) billing and compensation. As the billing and compensation issue warranted further analysis, IAG developed and distributed a survey to gather responses from each of the 10 UC campuses about their ILL commerce with the CSUs. These findings were forwarded to RSC.
- 4. Direct ISO Peer-to-peer Policy:** Upon request by CDL, IAG drafted a policy to guide CDL in establishing peer-to-peer messaging if approached by other institutions. Though the following proposal was drafted at the end of FY 2006-2007, it was formally discussed and endorsed by IAG in its July 26, 2007 conference call and has since been forwarded to RSC.

This policy is principally for CDL in responding to inquiries about establishing ISO-ILL peer-to-peer communications with UC's Consortial Borrowing System – Virtual Document eXchange. Though it was written with that purpose in mind, it can serve as a guide for the UC resource sharing community, in general.

Any institution in which UC has an existing or anticipated interlibrary loan relationship, seeking to establish peer-to-peer transactions as a **\*supplier only\*** with UC's Consortial Borrowing System – Virtual Document eXchange may be added by CDL without consultation. Institutions seeking to establish **\*requesting\*** and **\*supplying\*** peer-to-peer communication with UC shall be decided on a case by case basis by the Resource Sharing Committee.

**5. VDX-Docline Work Group (ad hoc):** Under the guidance of Bob Freel (UCLA) this work group investigated and reported its findings to CDL on issues relating to implementing VDX to manage DOCLINE requests.

**6. DeskTopDelivery:** UC's current DeskTopDelivery system relies heavily upon Ariel but Infotrieve's dedication to supporting this product is shaky, at best. Aware of this, IAG began exploring alternatives to Ariel. One path included an evaluation of the Odyssey free-ware product developed by Atlas Systems. Though Odyssey was dismissed as a viable alternative, another path investigated the document delivery function contained in VDX. While this investigation still continues, it was recognized that the fundamental issue was the lack of a formally recognized and adopted standard, upon which document delivery systems could be built, that guided the sharing of documents between libraries. This last issue is being formally addressed by the ALA RUSA-STARs Vendor Relations Committee, of which IAG has representation through its Chair. A draft proposal outlining the functional requirements needed in a document delivery system was made directly to the National Information Standards Organization's Managing Director and Standards Program Manager at ALA on June 24, 2007 by the ALA Vendor Relations Committee Chair.

**7. Inter-UC Recharge / Reconciliation Proposal:** IAG began discussing in spring and summer 2007 standardizing the practice of recharging other UC campuses for the replacement of lost and overdue materials. This is a difficult issue because it interacts with a wide range of campus policies and practice and exposes key differences between campuses. An ad hoc subgroup of IAG members was established during summer 2007 to evaluate this topic more fully and respond back to IAG during its in-person fall meeting with a set of guidelines and minimum standards for intercampus recharges.

**8. VDX – Zportal Enhancement Assessment and Voting:** IAG collaborated with the VDX Task Force in identifying those enhancements deemed most important to UC and recommended how our 100 "UC votes" should be distributed.

**9. VDX / JAVA Reports:** IAG solicited from its membership samples of statistical reports that would be useful for UC ILL units in gathering information from VDX. This was done in response to OCLC-PICA's declared intent to develop generic templates for all of its sites to use in gathering statistical information from the VDX database by way of Jasper Reports. The IAG (and VDX Task Force) responses were analyzed and then sent to OCLC-PICA predicated on common fields of interest from which campus specific reports could later be fabricated. The following 5 reports contained elements that would later serve as a solid foundation from which to build custom reports specific to any campus.

1. Overdue Report for lender
2. Overdue Report for Borrower
3. Patron's borrowing request details report predicated on a date range
4. Collection Development report predicated on classification (call no.) if available
5. Copyright Clearance Report – Details for Copyright Clearance Center Reporting