

Interlibrary Loan Advisory Group (RSC - IAG)  
Conference Call Minutes  
April 20, 2000

ATTENDING: Charlotte Rubens (UCB, RSC Liaison), Gail Nichols (UCD), Linda Weinberger for Sarah Eichorn (UCI), Elaine Adams for Donna Gulnac (UCLA), Janet Moores (UCR), Gary Johnson (UCSB, Chair), Deborah Turner (UCSC, minutes), Tammy Dearie (UCSD), Edith Amrine (UCSF), Rob Daigle for Naheed Zaheer (Stanford), and Jutta Weimhoff (NRLF).

1. **Approval of minutes (1/27/00 conference call)**

Approved as written.

2. **PIR/REQUEST Patron Survey Phase II, 4/17 to 4/23/2000**

Campuses are waiting for surveys supplied to PIR users during the week of 4/17 to 4/23/2000 to be returned. Survey results will be discussed during the next conference call. An on-line survey will also be conducted soon by CDL. Dearie will follow-up the availability of the results.

3. **CDL Update, PIR Phase II-III**

Dearie updated all on future PIR/Request phases, timeline, and enhancements. She noted that planned enhancements will be introduced between January and July 2001, instead of all at one time. It was noted that installing the consortial borrowing software would help with overall efficiency of all request processing. The RFP for the document is available on the PIR operations web site (<http://www.cdlib.org/libstaff/>) via a link listed under "Shared Collections."

The memo "electronic access to Interlibrary Loan and Document Delivery Services to UC campuses" (written by Nichols), regarding the extension of automating requesting to undergraduates, has been sent to the RSC. It was noted that opening up PIR to undergraduates was tied to the fulfillment software being available and in place.

4. **Fulfillment software resolution**

Dearie reported that the ULs and SOPAG discussed the Resolution on Consortial Borrowing Software report and the Interlibrary Loan Needs Assessment Final Report (both distributed via email). They agreed that RSC should go ahead with full scale implementation and move forward with procurement of centralized borrowing software.

The PIR Team called upon volunteers from RSC and IAG to evaluate the Consortial Borrowing Software available from specific vendors: Wings, Clio, III, Relais, Iliad, VDX, Epixtech, OCLC. As a result, certain vendors (Wings, Relais, VDX, Clio) have been invited to present information on technical specifications, of how the vendor system will interact with PIR, to the CDL PIR Team on May 1st, 3rd, and 4th. The PIR Project Team is still trying to schedule a demonstration/visit with ILLiad. The Team hopes to secure a sole source supplier; otherwise it will need to issue an RFP to select from multiple vendors. January 2001 is the anticipated implementation date of this test. If others would like to attend the demonstrations, contact Dearie.

5. **Confidentiality and ILL records**

All discussed records management issues as they relate to the automation and integration of ILL systems that now operate more similar to circulation systems. Topics involved stripping out patron information from records after an item has been returned, archiving records and dumping patron information after a certain age. Johnson noted that one selling point for integrated systems is the feature that allows users to see the history of their requests and that library users seem to like this. All agreed to look over local practices and policies regarding this matter and discuss at a future meeting.

**Action:** Move to the July 20th, 2000 conference call agenda. All agreed to review local policies regarding this matter.

6. **Tricor Memorandum of Understanding update**

Tricor was in agreement with changes we requested to date including weight allowance and time changes. The CDL Preservation Group requested changes to the new handling guidelines, and SOPAG approved them. Subsequent changes to the MOU should be finalized in the next few days and sent to Tricor's Bruce Roberts for comments. Dearie will distribute copies to IAG members prior to final approval. Dearie also announced that Barbara Bulen will soon be the new representative for Tricor operational matters regarding the UC account. More specific language concerning the handling of materials by Tricor personnel was suggested for Appendix 7, item # 4. Nichols pointed out that it would be helpful if Tricor personnel and vehicles were properly identified. It was noted that increasing the loss and damage coverage limits in the MOU would result in overall higher rates.

**Action:** Tricor delivery problem report form will be updated accordingly as MOU changes are finalized.

7. **Tricor shipping & packing guidelines**

SOPAG approved the new Tricor packing guidelines after removing the clause dealing with Special Collections' item transport (sent via email from Jorgenson to RSC, 4/5/00). Compliance seems to be increasing. It was noted that mail room staffs are responsible for implementing the new packing guidelines at some campuses. Packing guidelines are available on the Web at <http://www.lib.ucdavis.edu/uc-ill/> in section II, part H.

8. **Tricor delivery problem report form**

Inconsistency in reporting missed shipment errors was discussed. Johnson reported that UCSB has created a parallel, simpler form which is less time consuming for students to complete. Later in the week, staff transfer the simplified information to the CDL form. All discussed and decided against creating a brief sheet for lesser instances, like missed deliveries, while reserving the full form for more substantial damage. All expressed appreciation to Nichols for updating Tricor delivery problem report form. This report form is available at <http://www.lib.ucdavis.edu/uc-ill/> in section III, part A.

9. **ILL Workshops**

SOPAG approved the request from RSC to fund a series of ILL workshops featuring Mary Jackson (ARL). Jackson will present ILL best practices along with techniques for evaluating workflow. She will also include a review of ILL software packages as they affect workflow. The request has been forwarded to the ULs for approval. If approved, CDL will fund the workshops to be held on June 19-20 (northern) and June 26-27 (southern). Rubens (UCB) agreed to host the northern workshop; a location for the southern one is needed. Attendance will be limited. SOPAG requested that each campus decide who should attend and get approval for attendance through their local campus SOPAG representative. Circulation staff may be included. RSC members who are planning the workshop include Bellanti (SRLF), Dearie (UCSD), Gates (UCSB), Rubens (UCB), and Turner (UCSC).

10. **CDL Telnet Requests**

Dearie reported on telnet requesting statistics collected by Jane Dickson (CDL). She noted an overall decrease in use. All discussed and agreed not to expedite the demise of telnet requesting. Some reported that they encouraged patrons to use web resources by teaching them how to use the web or

by explaining that telnet features have less options.

**11. Desktop Delivery proposal**

Rubens and Nichols reported that RSC is proposing a pilot project for a new service, desktop delivery. CDL funding is being sought to equip interlibrary loan departments with Minolta 7000 scanners at an overall cost of \$368k (each campus would provide any necessary accompanying equipment). SOPAG requested that all campuses be allowed to participate. Many details of the proposed new service are still being worked out. It might work as follows: a patron searching in a CDL database would be given an option to have an item delivered electronically. The request would go to a lending unit. Lending unit staff would scan the item and save it to a central (or local) server. The server would send information to the requester about how the item could be retrieved electronically. The borrowing library would only be involved in updating the transaction after the patron is notified.

**12. Reserves and ILL**

Nichols reported that faculty have repeatedly requested to use ILL items for course reserves. Special circumstances have been arranged by individual campuses with the understanding that the ILL request should be initiated by the faculty member and that the supplying campus can recall the item at any time. Rubens stated that national ILL code cites preservation issues as reason for not allowing ILL items to be placed on Reserves.

**Action:** All agreed to note how frequently patrons request to use ILL to fill Reserve requests.

13. All agreed that Nichols will be the new RSC liaison to the RSC-IAG.

14. Future meetings dates

Conference call 7/20/00

In person meeting 10/19/00