University of California
Interlibrary Loan Advisory Group (IAG)
to the Resource Sharing Committee

Conference Call, April 19, 2001
Final Minutes

Present: Charlotte Rubens (UCB), Chris Dechoretz (UCD), Pam La Zarr (UCI), Linda Weinberger (UCI), Bob Freel (UCLA), Scott Miller (Recorder, NRLF), Janet Moores (UCR), Tammy Dearie (UCSD), Barbara Slater (UCSD), Edith Amrine (UCSF), Gary Johnson (Chair, UCSB), Kerry Scott (UCSC), Jennifer Walker (UCSC), Rob Daigle (Stanford), Kathy Kerns (Stanford)

Agenda:
• Consortial borrowing software / RFP status
• Special Collections ILL pilot project
• Desktop delivery
• Opposite region representation at annual northern and southern regional ILL meetings
• Privileges for visiting scholars
• Announcements
• Campus updates

1. Minutes of the January 25, 2001 meeting were approved with a correction to item 9 ("…including those participating in the project.").

2. Consortial Borrowing Software / RFP Status
    There is one "apparent successful bidder", but because the RFP has not yet been awarded, the selection remains confidential. Dearie has distributed to SOPAG, RSC, and RSC-IAG members a list of questions and responses from the "apparent successful bidder."   The document has been used by the Request Team to clarify vendor responses to the RFP. Members have been asked to review the document and identify any concern or issues by April 27. Once these matters have been addressed, purchasing negotiations will commence. Implementation of the CBS is still expected to occur this summer. In the meantime, campuses with existing ILL management systems will be asked about the data they may want migrated to the CBS (i.e., what fields to convert; how much data they have; how important it is to have the data migrated).

3. Special Collections ILL Pilot Project
    Project-related programming of CDL Request has been completed. A problem with the requesting of SRLF special collections is being corrected. The pilot project is expected to begin the week of April 23 or on May 1 with the release of the CDL Request update.

Several related issues were discussed:

- The "Special Collections Request Loan Form…": Members asked that "reasons for no" and "reasons for rejection" be added to the form. If photocopies are to be counted as part of the data collection, "Tricor (for photocopies only)" should be added to the form as a shipping method.
- How will the RLFs handle CDL Requests for special collections? Requests received by the RLFs via OCLC can either be referred to the ILL unit of the lending campus or be managed by the RLFs themselves. The decision on which method to use will be made by the RLFs in consultation with the Special Collections and ILL units in their respective regions.
- Will statistics be captured automatically for all special collections requests that go to a review file, particularly those for which a circulating copy is available? It's not possible to capture all statistics automatically. It seems easiest to have the borrowing library print these requests, annotate them "circ copy available", and attach to the Loan Forms.
- How will OCLC requests for special collections items be identified? The Borrowing Note will show the lending location.

La Zarr and Dechoretz will send Dearie their lists of "reasons for no"; Johnson will send his list of "reasons for rejection." Dearie will integrate these into the "Special Collections Request Loan Form."

4. Desktop Delivery

The latest version of the report from the Desktop Delivery Project Team was sent to RSC April 19 and will be distributed to SOPAG and the ULs for discussion at their joint meeting April 27. The Project Team developed a list of functional specifications, identified the necessary system components, and surveyed the marketplace for suitable products. The Team looked at several desktop delivery software packages: Relais Express, VDX (Fretwell-Downing), ERes, Prospero, and Ariel 3.0. They determined that ERes and Prospero do not allow the lending library to mount .pdf files on the web. Ariel 3.0 (due out in April) lacks the same capability, although RLG has recently stated that version 3.1 (due in June) will permit the lender to save .pdf's. (Note: As of 4/23/01, RLG is no longer projecting release dates for either version 3.0 or 3.1). VDX does not offer separate desktop delivery software, but does provide document delivery via Ariel in its CBS system. (Fretwell-Downing plans to implement full-featured desktop delivery in Fall 2001.) Relais Express is a stand-alone system that meets most (but not all) of UC's requirements for a desktop delivery system. However, the software is not ISO compliant, so updates of OCLC, local ILL management systems, or another CBS system would have to be done manually.

The Desktop Delivery report suggests that UC can either wait until the CBS is installed to move ahead on desktop delivery, or proceed with desktop delivery before CBS installation by having each campus establish (or continue) its own local system. It's expected that SOPAG and the ULs will make this decision at their April 27

meeting. They will also discuss distribution of any resource sharing money that might be available for developing or improving campus desktop delivery services.

In the meantime, Dearie reported that the Request Project Team is investigating the possibilities for modifying the CDL Request interface to allow users to select desktop delivery as a delivery option.

5. Opposite Region Representation at Annual Northern & Southern ILL Meetings
   Dechoretz asked about the feasibility of having a representative from the northern region regularly attend the southern region's annual ILL meeting (and vice versa). A UCD ILL staff member attended the most recent southern ILL meeting and was able to provide valuable input at the subsequent northern ILL meeting. Southern ILL members found it useful to have a "northern perspective" at their meeting.

   The idea was deemed to be a good one, in that it would promote the cross-fertilization of ideas and issues. IAG will discuss arrangements for the Spring 2002 meetings in its January conference call – specifically who will attend cross-regionally and what their reporting responsibilities will be.

6. Privileges for Visiting Scholars
   Rubens asked how other campuses identify visiting scholars for the purpose of granting library privileges, including ILL. Of those campuses that responded, all require that the scholar be registered with the appropriate campus office or department, or that they appear on a department payroll. Generally, visiting scholars are provided some form of identification (e.g., a letter) by the campus office or department that they can present to the library to obtain privileges. Most campuses grant ILL privileges to visiting scholars.

7. Announcements
   Dearie announced that Barbara Slater would be replacing her as UCSD's representative to IAG. Members thanked Tammy for her stellar contributions to the group.

8. Campus Updates
   The meeting concluded with a round robin of campus updates.

Next conference call: Thursday, July 19, 2001; 1:00 – 3:00. Stanford will take minutes.