

**University of California  
Resource Sharing Committee  
Interlibrary Loan Advisory Group**

**In-Person Meeting October 18, 2001  
Draft Minutes (1/14/02)**

**Attending:** Charlotte C. Rubens (UCB - recorder), Christine Dechoretz (UCD), Pamela Lazarr (UCI), Linda Weinberger (UCI), Bob Freel (UCLA), Claire Bellanti (UCLA - attending as RSC Liaison), Janet Moores (UCR), Gary Johnson (UCSB), Kerry Scott (UCSC), Jennifer Walker (UCSC), Edith Amrine (UCSF), Jackie Wilson (UCSF), Jutta Wiemhoff (NRLF), Rob Daigle (Stanford), Rose Harrington (Stanford)

**Absent:** Barbara Slater (UCSD)

**1) Announcements**

All were reminded to wrap Tricor shipments in plastic beginning 10/22/01, and to continue doing so through the end of April 2002.

**2) Approval of Minutes for 7/19/01 Conference Call**

The minutes were approved with minor corrections.

**3) New RSC-IAG Chair**

Kerry Scott of UCSC was elected incoming chair of RSC-IAG, to begin with the January 2002 conference call. (*note: see #5 below...in the discussion of IAG's charge, it was decided that there will be co-chairs elected with two year staggered appointments, similar to the way many other organizations work.*)

**4) 2002 Conference Call and Meeting Schedule**

Conference calls are scheduled for 1/24/02, 4/18/02, and 7/18/02. The in-person meeting will be held on 10/17/02.

**5) Review IAG Charge**

The group reviewed the IAG charge, and after further discussion agreed on two changes:

- 1) Under "Membership," it was agreed that it would be best to have an election each year for 1 of two co-chairs, each of whom would have a two year appointment: the first year would be a training year, and the person would serve as lead chair the second year. Charlotte and Kerry will look at the wording used by several other organizations, and propose a wording change. This year Gary will coach Kerry (he will serve as a resource), and next fall a southern co-chair will be elected.
- 2) Under "Meetings," it was decided to change "one spring meeting" to "one additional meeting."

**6) Desktop Delivery policy/procedural issues**

Discussion of Desktop Delivery began with a round-robin on the status of installation of hardware and software. There are serious problems getting ARIEL 3.01 to work with the Minolta PS7000 scanner because of inadequate driver software. In addition, there have been numerous complaints about service from Minolta. This has resulted in an implementation delay on all campuses except UCLA, which purchased Relais Express, based on their experience at the SRLF. UCLA expects to be experimenting and offering the service to their ORION Express customers first.

The issue of having web delivery as the default for all article requests was discussed. IAG's sense is that patrons should have the option to request a paper copy of an article, rather than web delivery. Previous experience with web delivery at UCB, UCSD, and UCD HSL bears this out. Claire will take this back to RSC and the CDL Request Team.

The group discussed Claire Bellanti's October 10 email to Gary Johnson, which included a list of issues related to desktop delivery which RSC wanted IAG to address:

- a. Email address is pulled by CDL Request from local patron records, if there; what to do if the email bounces? IAG agreed we must make sure the OCLC record is the first page scanned. If the email bounces, the lending library should forward the bounced email to the borrowing library's email address. IAG will develop a list of email addresses for these to be sent to. Chris will investigate if the borrowing library's email address can be added to the "Ship to" address in the constant data (we would not need to maintain a list if we can do this).
- b. What do we do if the patron tells us that they do not want to receive articles in desktop delivery format? IAG deferred this until Claire gets back to RSC and the CDL Request Team, as mentioned above.
- c. Should there be a consistent time period among campuses for postings to remain on the web? IAG agreed to make this 30 days if possible.
- d. Does the lending unit notify the borrowing unit when the article is posted? IAG agreed to do this via OCLC, indicating the request was filled.
- e. Should the email message to the patron be consistent from campus to campus? IAG agreed that there should be consistent elements, and they should be arranged consistently, as follows:
  - ✓ The document's location (URL or other indicator)
  - ✓ If there is a problem getting the document, who to contact (the home borrowing unit)
  - ✓ A copyright statement, if the system in use allows it
  - ✓ Statement regarding need for and availability of Adobe Acrobat
  - ✓ Document information (supplier/sender information; size of file, if available, etc.)
- f. Should color scanning be made available upon request? How would patrons request it if there is no choice on the CDL Request page? IAG agreed to defer color scanning and related procedures until after black and white is up and running.
- g. If an ILL unit scans a document out of copyright, do we want to attach it to a bibliographic record? IAG agreed this is a campus decision. We need clarification about what kinds

of material RSC has in mind. Some campuses may not be able to do this unless funding is available.

- h. Is there a different scan standard if we are saving scans for preservation? IAG is not sure, but we think so.

## **7) Consortial Borrowing Software Update (CBS)**

Claire Bellanti reported the contract has not yet been signed, but is expected soon. A kickoff meeting is planned for November 15 and 16 on this assumption. The kickoff is essentially a planning and implementation meeting. The UC Libraries have been divided into three groups for implementation. The first set of trainings will be on software and hardware for CDL staff. Immediately after that, training for the first group of UC's (UCLA and UCSD) will take place. There are two parts to setting up for each campus: a) software on a central server with a Windows client, and b) a web interface that will work for most daily ILL functions.

Claire will send out Mary Heath's FAQ.

Claire thinks the current functions/interface of CDL Request will come between the patron and the CBS, which will manage the request. The UL's know that something needs to be done about bills, as there is not really a billing function in the software. There are some standard statistical reports in the software, but Crystal Reports can be used to provide more.

## **8) Special Collections Pilot Project**

Claire Bellanti reported RSC is working on an evaluation process. The Special Collections Advisory Group wants to see the actual titles being requested.

## **9) Future of the Science Fax Project**

Kerry Scott of UCSC questioned the advisability of continuing the Science Fax Project. IAG decided to revisit the question after Desktop Delivery is in place. IAG also suggested considering whether to continue the BIOSHARES project at the same time.

## **10) Extending the UC ILL regular loan period – discussion**

RSC has asked for a list of pros and cons for extending or lengthening the UC-ILL regular interlibrary loan period to all patron statuses. A group of five IAG members agreed to draft a document to be forwarded to IAG and subsequently to RSC. Bob Freel will chair the group, which will include representatives from UCB, UCD, UCR and UCSC. Questions related to renewal policies and Medical Library exclusion should also be addressed.

## **11) Progress check on UC ILL Code update**

Gary Johnson is coordinating the update of the UC ILL Code. IAG agreed that by 11/15 each person responsible for a section should send it to Gary in MS Word format (with changes in colors).

There was no time for the campus round robin.