

**UNIVERSITY OF CALIFORNIA
INTERLIBRARY LOAN ADVISORY GROUP (IAG)
TO THE RESOURCE SHARING COMMITTEE**

**CONFERENCE CALL, APRIL 18, 2002
FINAL MINUTES**

PRESENT:

Charlotte Rubens (UCB), Christine Dechoretz (UCD), Pamela La Zarr (UCI- recorder), Linda Michelle Weinberger (UCI – recorder), Bob Freel (UCLA), Claire Bellanti (UCLA-attending as RSC liaison), Janet Moores (UCR), Barbara Slater (UCSD), Gary Johnson (UCSB), Kerry Scott (UCSC), Jennifer Walker (UCSC), Jacqueline Wilson (UCSF), Jutta Weimhoff (NRLF), Colleen Carlton (SRLF), Mary Munill (Stanford), Kathy Kerns (Stanford).

AGENDA:

- 1. Desktop Delivery Update**
- 2. UCLA Proposal for Web Delivery Notification**
- 3. UCLA Proposal for Web Delivery of Non-CDL Requests**
- 4. Special Collections Pilot Project**
- 5. SOPAG Privacy Task Force Report**
- 6. Recording and Distribution of Minutes**

1. Desktop Delivery Update

A discussion was held to determine readiness for providing web delivery on Monday, April 22, 2002.

- ◆ UCB - Yes
- ◆ NRLF - Yes
- ◆ UCI - No
- ◆ UCSD SSH – Yes, on a limited basis
- ◆ UCSD BMD and MCL - No
- ◆ UCSD SIO and IRPS – No
- ◆ SRLF - Yes
- ◆ UCLA – Yes
- ◆ UCD – No
- ◆ UCSB -Yes

Charlotte Rubens would like to see test examples of web delivery before they go out live. She asked for examples to be sent to both the PIROPS and IAG listservs. UCB recommended a 30-day time limit for posting to the web, but no limits on the number of times an individual could log on to view the documents. Jackie Wilson suggested that the wording in the subject line indicate UC or UC ILL Request. Charlotte added that the wording should be consistent for every campus. Bob Freel preferred generic language for the subject line, because many of UCLA's web delivery requests are already going outside the UC system.

Several campuses asked whether copies of DTD notifications should be sent to the borrowing unit via e-mail or Tricor:

- ◆ UCB reiterated that their copies of OCLC ILL requests will be stamped "Filled by DTD" and sent via Tricor to the home borrowing unit to update their requests.
- ◆ UCSC preferred sending notification sheets via Tricor.
- ◆ UCSB indicated e-mails were fine as long as an accurate total number of pages were included.
- ◆ UCLA explained that CDL requests for DTD would be sent automatically to the patron with a copy of the request sent to the borrowing unit. DTD requests received via OCLC or DOCLINE may also be sent directly to the patron if the borrowing unit instructs them to do so.

At the conclusion of this discussion it was agreed that IAG representatives would check in with our Borrowing operational people by 5:00 PM, Monday April 22, 2002 to determine their preference regarding how the notification paperwork for web delivery is received:

- A. All libraries follow the same procedure and send the paperwork via Tricor for batch updating.

OR

- B. Most libraries will send the notifications via Tricor, but UCLA will send via e-mail.

2. UCLA Proposal for Web Delivery Notification

Bob reported that UCLA and SRLF would like to use the Relais CC (Courtesy Copying) function as part of the e-mail notification process. A sample format would include:

From: (providing unit)

Subject: (document sent to patron)

Body: (listing of ILL number and number of article pages)[for Copyright Compliance Center]

3. UCLA Proposal for Web Delivery of Non-CDL Requests

Bob reported that UCLA is willing to provide Desktop Delivery for non-CDL requests. Gary Johnson responded that UCSB is also willing to provide the same service. Charlotte indicated that UCB is not ready to provide this service at this time. Bob noted that UCLA is able to provide 100 DTD requests per day using Relais and the Minolta PS7000 scanner. The wording requirements for the subject line of the Web Delivery notification were discussed. Most UC's will use SUBJECT LINE: UC ILL REQUEST. NRLF prefers SUBJECT LINE: UC DOCUMENT REQUEST.

4. Special Collections Pilot Project

Gary reminded everyone that the data-gathering period for this pilot project is April 29, 2002 to May 10, 2002. A separate form has been distributed for this period. Upon completion, these forms and the OCLC bibliographic record information should be sent to Cathy Holdeman, Social Sciences & Humanities Library, UCSD. CDL is programming a new OCLC source code to indicate Special Collections requests. This will appear as UCPIR[campus code]9; for example: UCPIRI9. Claire Bellanti said that CDL intends to have this source code change ready by next week, and that it would be a permanent change.

5. SOPAG Privacy Task Force Report

SOPAG has just released a new report for broad review by all campus groups. The report concerns privacy issues related to libraries and is available on the web at:

<http://www.cdlib.org/libstaff/privacytf/>

- ◆ UCLA - supports the direction of the report.
- ◆ UCSD - ILL units are already sensitive to confidential records and already have retention policies about keeping things on the web in place. Fee for service units are not included in the document and these services should be considered in the task force report as well with more guidelines and recommendations.
- ◆ UCD – supports the report.
- ◆ UCB – supports the report and already shreds financial records after the financial retention period expires.
- ◆ UCI - agrees with the report as well. The issue of whether the patron information could be removed from electronically stored ILL requests on VDX should be considered. Claire agreed to take the matter back to the VDX Team.
- ◆ UCSB - points out that nothing specifically mentions providing staff training to comply with privacy recommendations, but thinks it may be implied.

6. Recording and Distribution of Minutes

Draft minutes should be distributed to members via the RSC-IAG listserv. After comments, corrections, and approval have been received, final minutes should be sent to the RSC-IAG listserv and also to Gail Nichols for posting on the UC Interlibrary Loan Manual and Directory web site. Currently minute taking rotates alphabetically by campus. A proposal was made that the co-chair of IAG take the quarterly minutes. This is still open for discussion.

At the conclusion of the agenda items, discussion reverted to additional web delivery topics:

- ◆ CDL will not provide publicity for web delivery at this time.
- ◆ UCLA and UCSC are doing some advertising and providing information to reference librarians to assist with questions from users.
- ◆ RLG's upgrade for the Minolta PS3000 TWAIN drivers is scheduled for a mid-May release. The TWAIN driver upgrade for the Minolta PS7000 will be the next thing worked on.
- ◆ Scanning logistics:
 - ◆ UCLA - Branch ILL materials are sent to a library with a scanner.
 - ◆ UCSD - All branch libraries have scanners.
 - ◆ UCD - All branch libraries have scanners.
 - ◆ UCB - Main and Biology libraries have scanners.

The next conference call is 1:00 – 3:00 p.m., Thursday, July 18, 2002. UCLA will take minutes.