

University of California Interlibrary Loan Advisory Group (IAG) to the Resource
Sharing Committee (RSC).
Conference Call, January 30, 2003
Minutes (2nd DRAFT 2/10/03)

Present: Charlotte Rubens (UCB), Christine Dechoretz (UCD), Pamela La Zarr (UCI), Linda Michelle Weinberger (UCI), Bob Freel, Co-chair (UCLA), Colleen Carlton (SRLF), Claire Bellanti (RSC Liaison), Anne Harlow (UCR), Barbara Slater (UCSD), Gary Johnson (UCSB-recorder), Kerry Scott, Chair (UCSC), Jennifer Walker (UCSC), (UCSF), Jutta Wiemhoff (NRLF), Rose Harrington (Stanford).

1. Approval of October 24, 2002 minutes.

A re-edited draft of the minutes, incorporating the most recent additions, will be distributed by Kerry Scott to IAG for final approval.

2. New IAG Web site.

Members were asked to evaluate the accuracy of the new IAG Web site (<http://sshl.ucsd.edu/iag/>), with special attention to the Intercampus ILL Code contained in the Manual of ILL Policies and Procedures. Corrections and amendments will be shared via the IAG e-mail list (rsc-iag-1@listserv.ucop.edu) with final changes forwarded to the Web master by Kerry Scott.

The newly established Web Delivery Troubleshooting Guide found under the Helpful Links topic within the IAG Web site is available as a resource for anyone experiencing difficulties with Desk Top Delivery of documents. Everyone agreed to add the Guide's link (http://sshl.ucsd.edu/iag/web_del_help.html) with explanatory text to their Desk Top Delivery system's e-mail notice.

3. Desk Top Delivery (DTD) update.

The majority of UC libraries are providing DTD. UCSF, UCSD, and UCD are moving closer to providing this service, as well. UCI has expanded their DTD service by adding the Grunigen Medical Library. Campuses currently providing DTD were reminded that the supplying library must provide confirmation of having supplied a document via Desk Top Delivery to the borrowing library by one of the following means only:

- e-mail to ILL borrowing unit
- OCLC workform sent via Tricor
- Faxed OCLC workform
- Arieled OCLC workform

4. VDX update.

Claire Bellanti, having attended the VDX users group meeting in ALA mid-winter at Philadelphia, gave a brief summary of the meeting. Some of the meeting addressed the interest in linking together consortiums for conducting resource sharing. Resource sharing within the UC environment is envisioned somewhat differently and is more focused on the local sharing of resources and then continuing to pass requests that are not available within the UC to OCLC. The recent announcement that Infotrieve had bought Ariel is of concern to VDX users since Fretwell-Downing (FD) was already negotiating with RLG to use Ariel as its document delivery system. The future of this relationship is unknown.

Probably the largest issue for VDX implementation for the UC is "...symbol inheritance for use of OCLC – all units that share an OCLC symbol need to be able to send to OCLC independently". Put another way, each ILL unit at a multi-unit campus sharing the same OCLC symbol requires separate OCLC profiles. FD has done some work to make this happen, and the programming is in test at UCLA and UCSD. First tests have proven that the basic plan to make this work is successful, but a few more issues remain to be worked out.

Everyone was reminded that Mary Heath had posed a question within her January 15, 2003 VDX status report about whether IFM accounting was done at the symbol or account level. Claire was concerned about the lack of communication and answers to that query, which was sent to the UC VDX listserv. IAG agreed that based on the OCLC IFM reports, IFM accounting is done at the symbol level.

5. Special Collections/ILL Pilot Project DRAFT report.

A draft of the Special Collections/Interlibrary Loan Pilot Project Final Report and Recommendations distributed by Tammy Dearie to RSC, HOSC, and IAG on January 20, 2003 was discussed. Much of the discussion focused on recommendation #2 and the workload that it entailed. Additional topics, to name a few, included speculations about the origin of why Special Collections materials were made available via CDL Melvyl, where the review of the request was best accomplished, and how past cataloging practices in Melvyl might influence the likelihood an item might be requested. Although many had already responded directly to Tammy Dearie, IAG will craft a formal response. Kerry Scott will contact Tammy and request an extension from the response deadline of January 31, 2003. Kerry will oversee the crafting of the response and distribute for approval within IAG before supplying to Tammy.

6. RLF Reserves issue.

This was a preliminary discussion about the part of the UC ILL policy regarding "Limitations on Group Use" related to reserves. The issue was raised by the UL group and referred to RSC. Claire Bellanti indicated that RSC Chair Tammy Dearie would be sending a charge to CAG and IAG to cooperate in developing procedures that will allow

the use of RLF copies for reserve in accord with the UL's wishes, but also allow some of the preservation concerns to be managed.

7. UC-DC program

Interlibrary loan requests from this group were infrequent, at best, but fell within the general category of distance education users. Supplying of photocopies and digital scans of articles would be provided but the sending of returnables from another campus requires further discussion. This topic will be revisited during the April 10, 2003 conference call within the general topic of ILL for distance education students and remotely located ILL patrons

8. UC Elinks

Please send newly encountered UC E-links problems to the PIR Operations List (PIROPS-L@LISTSERV.UCOP.EDU). Copy and paste the significant bibliographic record, such as the OCLC direct produce or failed UC e-link record, into the e-mail sent to this list. Do not send the problem directly to the CDL programmers.

9. CAG Blocking Proposal.

This is a preliminary discussion in preparation for a formal evaluation by RSC, IAG and CAG to be conducted at a later date as directed by RSC. The essence of this is to develop a strategy to effectively address individuals who are blocked locally but circumvent the block by obtaining privileges at another UC library. The importance to IAG is that RSC has concluded that it should consider revising the UC ILL Lending Code, incorporating some CAG recommendations and procedures to develop a broader UC Resource Sharing Code.

10. UC Privacy Task Force and ILL.

This topic will be discussed in greater depth during the next IAG conference call on April 10. IAG members are to begin reflecting over how patron information is treated within the ILL process. Issues about patron information, its retention, and retrievability within the overall ILL process are to be considered. For example, what kind of patron information does OCLC keep for each interlibrary loan request? Is patron information retained after the transaction is concluded for electronic and paper records? Who has access to patron information?

11. Tricor MOU

The Tricor MOU is currently being renegotiated and each campus is being asked to assess the general performance of this courier service. Emphasis should be placed on whether currently assigned weight allowances are adequate and if the billed weights are indeed accurate. Another concern is whether the current replacement cost of \$100.00 per book ought to be raised to a higher amount. Service issues such as lost/damaged material

and inconsistent or delayed delivery times should be addressed at this time. A downloadable spreadsheet, for example, containing weights, dates, charges and greater detail for pickup locations would be desirable. Individual campuses are to respond directly to Tammy Dearie by February 28, 2003. See Tammy's e-mail sent to the IAG e-mail list on 1/23/03 for more details and the URL for the Tricor MOU.

12. Infotrieve/Ariel purchase info check-in

RLG, a non-profit library centered organization, has sold its Ariel software to Infotrieve, a for-profit commercial enterprise. The Ariel document delivery system is heavily used by the UC libraries and negotiations between Fretwell-Downing and RLG for incorporating Ariel into VDX were never finalized. The status of Ariel between Fretwell-Downing and Infotrieve is unknown. This topic will be discussed further at the April 10, 2003 conference call.

13. CDL Melvyl Request and locally owned items.

The discussion of this topic posed by Kerry Scott in her December 13, 2002 e-mail to the IAG list is postponed until the next conference call on April 10, 2003.

Next conference call will be from 1-3 on Thursday April 10, 2003. UCSC will take minutes.