

**UC Resource Sharing Committee – Interlibrary Loan Advisory Group (RSC-IAG)**  
**October 27, 2004**  
**UCLA Biomedical Library Rare Book Room**

Present: Chris Dechoretz (UCD), Jon Edmondson (SRLF), Collette Ford (UCI), Bob Freel (Chair, UCLA), Ann Harlow (UCR), Rose Harrington (Stanford), Gary Johnson (UCSB), Pam LaZarr (UCI), Terri Mason (UCSF), Janet Moores (UCR), Charlotte Rubens (UCB), Barbara Slater (recorder, UCSD), Jennifer Walker (UCSC), Linda Michelle Weinberger (UCI), Jutta Wiemhoff (NRLF).  
Guests: Julie Kwan, Claire Bellanti, Jennifer Lee

1. Approval of the July 22, 2004 minutes as distributed.
2. Blocking PIR for items on Reserve  
Barbara Slater and Bob Freel distributed a proposal regarding blocking PIR for items on Reserve and are checked out. The proposal seeks permission from RSC to proceed with modifying the programming to block these transactions. Concerns and questions included:

What will happen if the campus has multiple copies of a work and only some of them are on Reserve but all are checked out?

Exactly how well the various Circ systems behave?

If permission is granted, RSC-IAG would like to review the specific specifications for CDL and check the performance of the changes.

**Action:** Bob Freel and Barbara Slater will make sure the proposal is submitted to Claire Bellanti as RSC Chair.

3. VDX Issues: Communication from the Task Force to Guide VDX implementation for UC.  
Gary Johnson is co-chair of the Task Force and can keep RSC-IAG informed. The VDX implementation task force records minutes at each of their meetings and calls. The agenda and minutes will be distributed to the UC-VDX listserv. The co-chairs of the Task Force will distribute additional information to RSC-IAG as necessary.
4. VDX Issues: Docline  
The National Library of Medicine is planning to release ISO compliant Docline for use with Illiad in mid-November. They are seeking applications for beta test sites to test ISO Docline with VDX. The testing is done on a test server. UCLA is interested in applying to test VDX with ISO Docline.

Docline has some current functionality that will not be possible when using the ISO VDX/Docline protocol. The most significant item that is known to date is that

Loansome Doc will not be possible. The medical campuses reported the status of their Loansome Doc patrons as

- UCLA – Non-UC affiliated only
- UCSF - Dose not use Loansome Doc
- UCI - Non UC affiliated only
- UCD - Both UC and non-affiliated
- UCSD - Both UC and non-affiliated

Concerns, ideas and questions included:

- Billing for Loansome Doc will need to be addressed.
- There is an expressed desire to continue to use EFTS.
- What if the “fee for service” units process the requests?
- What other vendors +/-or consortia should we test? RLIN, Australian consortia.
- Integration of Ariel with VDX is desirable, but is a separate issue

**Action:** Bob will ask RSC Chair, Claire Bellanti for permission to have UCLA apply NLM to be a test site.

5. VDX Issues: Recommendation on VDX Record Retention Policy.

The number of records in the VDX database continues to grow. Mary Heath has asked the VDX implementation team for advice on the retention of records. The issue of patron privacy and when to break the link between patron name and the transaction record should be addressed too.

The ILL operational staff need to have records linked with patron name for a period of time to resolve follow up inquiries (the time period of 2 years was mentioned, but no discussion took place).

Concerns, ideas and questions included:

- Would archiving of the database be a potential solution?
- We need to investigate the UC retention policy and minimally comply with any legal requirements.
- The “Notes Field” may include private patron info like e-mail address and barcode. In addition to breaking the link we may need to look at the “notes field.”
- The link is broken immediately for Circ transactions, should ILL try to follow suit?
- Other groups that need to be included in the discussion: RSC, SOPAG, Privacy Taskforce, Legal requirements, etc.

**Action:** Charlotte (UCB), Gary (UCSB), and Chris (UCD) will work together to articulate the specific questions and identify potential solutions.

6. ILL Requests from the National Laboratories

UC Davis discontinued providing no charge ILL service to the National Labs in the spring of '04. UC Irvine has experienced an increase in lending requests from the Labs. (up from 20 in Sept '03 to 87 in Sept. '04). UCLA has not seen an increase in requests (86 last year and 87 this year). All other campuses were asked to supply lending data to the labs (May-Sept) to Charlotte by Nov. 15<sup>th</sup>.

There is no reason we can not charge the Labs. The Labs are not on OCLC so we very rarely borrow from them. Anecdotal stories express difficulty getting loaned material back from the lab patrons.

**Action:** All RSC-IAG members will gather the data regarding lending to the National Labs and supply the information to Charlotte (UCB) by Nov. 15th

7. IAG Annual Report 03-04/Goals and Objectives for 04-05  
Bob distributed the Annual Report for 03/04 and the goals for 04/05. Two additional items were added to the 04/05 goals: Retention policy for VDX records and archive policy and Docline and VDX via ISO
8. Minimizing User Frustration with UC E-links  
Claire Bellanti joined the group for this discussion. RSC discussed the issue last week. Bob distributed a document that had potential wording changes for "Request." IAG made additional wording suggestions. The goal is to reduce user frustration.

The issue of a patron's ability to order a whole volume of a journal was discussed. The ability may become more important as the Dim Archive and shared collections continue to grow. However, SRLF reported that demand was very low for the Dim Archive material. We should not offer the capability to order a whole volume of a journal unless we (the individual libraries) are willing to lend our journals.

Concerns, ideas and questions included:

Journal volume ordering may be problematic if the campus owns part of the journal title (PIR will block the Request as an item owned by the campus.)

Most of IAG agreed that it is desirable to automate as much as possible for the patron. There was not consensus as to whether REQUESTS for whole volumes of journals should be routed to lending libraries or to the review file of borrowing ILL unit.

Can CDL supply "bread crumb" location for the patron (e.g. Melvyl>PubMed>UC Elink)? Most of the proposed wording changes to the patron assume that they know where they are within our systems.

An interim page may make the process simpler (e.g. I need an article/I need a whole journal volume).

9. Report on Elsevier /ACM Dim Archive at SRLF

Jon reported the acquisition and ILL statistics for SRLF Dim archives. They have received 14,317 issues to date. They have received 26 Requests YTD for document delivery services . The patrons were contacted and in only 9 of the instances the patron needed the physical volume sent. Of these 9 instances 6 were for the same piece, which was a supplement that was not online. One of the 9 instances was a request from the cataloging dept. Of the remaining requests that were NOT sent, the majority were not sent because the patron wanted the online version instead. The materials are for UC use only and are library use only. SRLF will continue to keep statistics on usage. The demand for the material in the Dim Archive has been very limited.

10. Housekeeping

There were no volunteers to serve as chair elect of RSC-IAG. The issue will be discussed at the next conference call. The chair elect should be from a southern campus.

Terri will send out the dates for the 2005 RSC-IAG meeting and conference calls.

The RSC-IAG Chair will be excused from taking minutes at the meeting.

RSC-IAG could assist in program planning for the southern and northern meetings.

For anyone attending ALA in Boston there will be an informal, no host lunch after the ILL meeting on Saturday.

11. Bob was thanked for serving as the RSC-IAG Chair.

12. Meeting adjourned at 2:45 pm