

UC Resource Sharing Committee – Interlibrary Loan Advisory Group (RSC-IAG)
April 19, 2005 Conference Call

Present: Chris Dechoretz (UCD), Jon Edmondson (SRLF), Bob Freel (UCLA), Ann Harlow (UCR), Gary Johnson (UCSB), Pam LaZarr and Linda Michelle Weinberger (UCI), Terri Mason (chair, UCSF), Charlotte Rubens (UCB), Barbara Slater (UCSD), Jennifer Walker (UCSC), Jutta Wiemhoff (NRLF), Mary Heath (Guest), Rose Harrington (Stanford.)

1. Minutes from the January 20, 2005 meeting were approved, with minor corrections.
2. Specifications for changing how Request handles Journals in Melvyl and combined ILL / DDS Requests...Report from Task Force.

Bob Freel distributed suggested changes to CDL proposal for “Specifications for in-line handling of journal Requests from Melvyl” via email. Sherry Willhite has created citation linker forms specifically for requesting whole volumes of a journal. Concerns were raised that patrons may request whole volumes when they actually only need an article, thus reducing their chance of getting the item they need. We discussed including an informational warning on the whole volume request page to the effect of “If you need an article, you would do well to use the article form.” All such ideas should be sent to Sherry during the testing phase.

Also, remember to test the changes to the Document Delivery feature of citation linker, getting feedback to Sherry as quickly as possible. Terri Mason will send around the information again.

3. VDX records retention policy recommendations...Report from subgroup

Charlotte Rubens, Chris Dechoretz, and Gary Johnson reported on their conversations regarding record retention in VDX. Mary Heath said we would be able to issue monthly statistics to each campus, but that the time period coverage and data contained in the report would need to be the same for all campuses. Chris distributed a survey via email in January 05, and those results showed a wide variety of needs amongst the campuses. We reviewed the list of data elements that we could extract from VDX. We discussed whether or not to include patron information in the reports. The reports will be in some sort of comma delimited file that can be manipulated by individual campuses.

Action: IAG representatives will send an email with any data elements they would like to have included in these monthly report that is not already on the list. We will refer this to HOPS-SOPAG-RSC for further guidance on privacy issues.

4. Report from Southern UC ILL Meeting ... Northern ILL Meeting rescheduled to May 12th, 2005

Those who attended the Southern UC ILL Meeting reported. Highlights included a demonstration of remote searching in VDX windows and searching in the Footprints database. Northern UCs are looking forward to their meeting on the 12th of May. Notify Charlotte how many will be attending.

5. "Best Practices" for ILL with VDX – Proposal to Adopt Action-Message for DTD Notification from Responder, and report from subcommittee

Proposal for DTD Notification

The proposal to use "Action - Message" for Desk Top Delivery notifications was unanimously endorsed as the **single** method for sending DTD notification by the responding library to the borrowing library. Adopting this single method is now possible since all UC libraries are now using VDX in lending to other UCs. Mindful of the advent of the Z-Portal user interface, it is important that this messaging strategy be done only **AFTER** an item has actually been posted to the Web and updated to shipped. This method replaces the different approaches currently used such as e-mailing, faxing, snail-mailing, and Arieling DTD notifications to the borrowing library. Please begin using this method immediately for sending DTD notifications to all UC campus locations using VDX in Borrowing (UCD, UCSF, UCSC, UCM, UCSB, UCLA, and UCSD).

Important Exception: Continue using your current practice for sending DTD notifications for UC locations NOT currently using VDX in borrowing (UCB, UCI, & UCR).

System-Wide Best Practices

The subcommittee formed last meeting to discuss Best Practices (Gary Johnson, Charlotte Rubens, and Jennifer Walker) reported on their discussions. After lengthy discussions in the subgroup and on the conference call, there was wide agreement that this is a tricky topic to get a handle on. Some suggested starting points included elaborating our goals or developing a mission statement, or reviewing historical documents, such as the Scott Hughes report.

Action: We will develop a timeline review retrospective, beginning with Scott Hughes, through the present.

6. PIR blocking for Reserves Materials -- Status

The proposal to block PIR requests for items on Reserve at the patron's home campus has been both to RSC and SOPAG, and generated lively discussion in both committees. The discussion has moved beyond the question of whether or not we should close a loophole

with some programming help from CDL, to a discussion of whether or not it makes sense to prevent patrons from accessing materials that are on Reserve.

Action: IAG members are encouraged to discuss this topic with their RSC and SOPAG representatives.

7. OCLC Migration

OCLC is going to be changing the way they bill for services, a letter has gone from SOPAG to the ULs. ULs will continue to work with OCLC on pricing issues.

8. Coordination of upgrade to Ariel 4.0 – still needed?

Ariel 4.0 was not backwards compatible with earlier version of Ariel, and we had discussed coordinating our start dates. The new version, Ariel 4.0.1 should fix this problem, though it hasn't come out yet. UCSB is testing the new version currently. Testing will continue until May 4th.

9. Consortial Discount on Copyright Clearance

We discussed the TRS Volume Purchase Program for Consortia. If your consortia members collectively pay more than \$10,000 annually, you can qualify for a discount: a processing fee per transaction of \$1. instead of \$3.

Action: Terri is going to investigate what this would require.