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

Conference Call, February 2, 2006

MINUTES

PRESENT:

Charlotte Rubens (UCB, recorder), Mary Heath (CDL), Jason Newborn (UCD), Pam La Zarr (UCI), Linda Michelle Weinberger (UCI), Bob Freel (UCLA), Denice Sawatzky (UCM, Chair), Anne Harlow (UCR), Gary Johnson (UCSB), Jennifer Walker (UCSC), Kymberly Goodson(UCSD), Keir Reavie (UCSF), Jutta Weimhoff (NRLF), Jon Edmondson (SRLF), Gail Nichols (RSC Liaison), and Rose Harrington (Stanford),

1. Minutes from November 3, 2005 in-person meeting were approved without amendments.

2. RSC Report – Gail Nichols.
   Other than the previously distributed list of topics for IAG to act on as a result of the October 2005 RSC and SOPAG meetings, there were no new topics to report.

3. CDL/VDX Report – Mary Heath
   The current migration to VDX 2.7.4 and Oracle 9.0 from VDX2.7.3 and Oracle 8.0 is complicated and difficult. The migration's purpose is to gain benefit from the built-in enhancements in 2.7.4 such as interoperability with DOCLINE and also to improve the speed and performance of the application by moving to Oracle 9.0 and also moving to a bigger and faster machine. The migration is a top priority and everything else is on-hold until it is completed. Once the migration is done, work will begin on configuring interoperability with DOCLINE. Since CDL's migration is scheduled for the weekend of February 11-12th all end-user workstations must be upgraded to VDX 2.7.4 and Oracle 9.0 beforehand.

   CDL sponsored VDX workshops conducted by Ed Davidson from Fretwell-Downing are scheduled for March 6-7th in Oakland and on March 9th-10th at UC Irvine. All relevant staff are invited to attend, given support at the local campus level. (note these dates have been changed)

Old Business

1. Updates to IAG membership and web page should be sent to Denice who will have them done.

2. IAG Action Items from RSC and SOPAG meeting (call for volunteers):

   a. Bob Freel volunteered to draft modifications by the next meeting to the UC ILL Guidelines for lending for lending Special Collections materials to incorporate the pilot project forms and procedures into the ILL procedures. The

HOSC/RSC report with the recommendations can be found at the following URL:
http://libraries.universityofcalifornia.edu/rsc/ILLHOSCRSCFinalReport.pdf
Specifically, look at the first two bullets under Summary of Actions Needed (page 2) The UC ILL Guidelines can be found at the following URL:
http://libraries.universityofcalifornia.edu/rsc/iag/index.html

b. Gary Johnson and Charlotte Rubens will collect CSU lending and borrowing transaction data for the period Jan.-May 2005 for each campus in preparation for a proposal to extend ISO-ILL interoperability with the CSU's. IAG also needs to identify which campuses charge/pay CSU's for ILL transactions, as there may be some who do not charge or have special arrangements with one or more CSU libraries.

c. The UC Intercampus ILL Code needs to be changed to reflect the new policy that allows borrowing materials deposited at the RLFs for use in campus course reserves. Jon Edmondson will draft the language to make the changes based on the 2003 final report that included the policy change.

d. Kimberly Goodson agreed to draft language to eliminate the copy/scanning limits from the UC ILL Code. The limit of pages to be scanned/copied is at the discretion of the campus and should be reviewed on a case-by-case basis.

e. A VDX Task Force is exploring how to capture information for both filled and unfilled media and special collections requests so that SOPAG can continue the discussion of how to encourage campuses to lend these materials. They will report back to the group.

3. Using VDX to manage DOCLINE. Bob Freel suggested forming a VDX/DOCLINE taskforce to look at what it would take to implement VDX to manage DOCLINE requests.

Many of DOCLINE's rich features are not supported by the ISO protocol and therefore will not be supported by VDX. The taskforce can identify these features. We already know that some of the features we would lose are:
- Loansome Doc (PubMed's document delivery system used by health care professionals and small institutions).
- Ability to send a certain type of request to a library that provides a specific service such as color scans.

Some features are major (the former), while some are minor (the latter).

Freel will talk to IAG representatives to get at least one representative from each of the campuses which use DOCLINE on the taskforce (UCD, UCI, UCLA, UCSD, UCSF). Taskforce members will be responsible for gathering data,

communicating with frontline staff, supervisors, and directors, and making recommendations.

4. Record retention - Gary Johnson indicated CDL is waiting for an upgrade to VDX to support achieving the goals of our record retention decisions. It was also agreed that archiving would probably help to speed up machine processing. Gary and Charlotte Rubens will make a recommendation for IAG to consider sending to RSC for approval. It would then go to UCOP for implementation.

5. Best Practices – Jennifer Walker emailed a list of best practices culled from responses to her inquiry to IAG. Denice Sawatzky and Jennifer will continue to work on this/

6. One Year Loan Policy – Units which have moved to a one year loan policy report things are going well. These include UCM, UCR, UCSB, UCSC, UCSD's SSH Library, and both Regional Facilities. The remaining institutions reported they have not implemented. Several noted a lack of institutional support. UCLA is trying to advance the idea within their administration.

7. CCC – Pam LaZarr has submitted the worksheet to the CCC, and they are confirming the information. Pam indicated noone should submit a request for a discount while this is in process. She hopes to hear from Barbara at the CCC next week. Pam will convey relevant information to the group as soon as she receives it.

8. Bibliographic Services Task Force (BSTF) Report – After a brief discussion the group agreed that IAG could offer our expertise based on experience when it comes time if the decision is made to create a single catalog interface for all of UC.

9. ALA in San Antonio – Gary reported on the Ariel User Group meeting, and implementation of Ariel 4.1.1, which he described as a big improvement. You can retrieve a PDF from an external source and post it to the web. UCSB is using it for digital dissertations. He and Charlotte reported on the FDI User Group.

The next IAG conference call will be May 4th, 1-3 p.m.