

Resource Sharing Committee – Interlibrary Loan Advisory Group (RSC-IAG)

Meeting Date: January 25, 2007; 1-3 p.m.

Minutes

Attendees: Sherry Willhite (CDL), Charlotte Rubens (UCB), Jason Newborn (UCD), Pam La Zarr (UCI), Linda Michelle Weinberger (UCI), Bob Freel (UCLA), Denice Sawatzky (UCM), Bernice Ridgeway (UCR), Aleta Asbury (UCSF), Gary Johnson (UCSB) Chair, Jutta Wiemhoff (NRLF), Jon Edmondson (SRLF)

Minutes approved from Nov. 2 and posted

Agenda

Housekeeping Items:

UCM took minutes for UCSD

Stanford not present

UCSC not present

Bernice Ridgeway represented UCR

Reports

Meeting –Charlotte

-Jan 9th Meeting in Oakland for the Review of VDX Implementation

Discussion of what went well and what did not.

The meeting was very informative for future implementation

The next big implementation will be Verde, an electronic resource management system (ERMS).

-Jan 18th RSC Meeting

VDX Task Force Team's next incarnation

RSC sent the VDX Task Force charge extension to SOPAG for reinstatement on 1/26.

Hopefully a decision will be made about the future of the VDX team. For now, CDL will take the lead asking for one Request and one Technical ILL Liaison from each campus.

-Tricor Budget – nothing to report

VDX/CDL – Sherry

-CDL is moving forward preparing for Mary Heath's retirement at the end of June 2007.

-Sherry spoke with Ralph Horton at ALA mid-winter about issues with the VDX upgrade. Evidently, Oracle 9 will not work with the VDX 3.1 upgrade. Oracle 10 will need to be used which will require assistance from the OCLC/PICA group to help with details.

Ralph Horton mentioned that the integration detail for the Ariel Document Delivery feature in VDX was lost in the. Infotrieve upgrade of Ariel

-Plans for NCIP – VDX version 3.1 is NCIP compliant. Exploiting NCIP, however, requires NCIP compliance in the local integrated library system's circulation module.

OCLC has an NCIP API that UCB could use to interact with their own home grown ILS.

-Bernie Hurley, SOPAG chair, gave the go ahead for the VDX Task Force to continue until further notice. This team's form and function will be considered in light of other UC system-wide library committees during a later meeting.

ALA Midwinter Conference – Group

-During the OCLC PICA North American Users Group meeting attendees briefly discussed if there was interest in having an integrated document delivery utility available within VDX that offered the same types of functions, including DeskTopDelivery, found in Ariel. The group viewed this as valuable but also recognized that this would be a major enhancement for VDX and would compete with other types of advances already scheduled for development. -Much discussion at ALA was about Infotrieve not being forth coming despite numerous formal requests to engage the company. OCLC already has identified a field for Odyssey IP addresses on the Resource Sharing Module's workform which underscores OCLC's expectation that Odyssey will become a core mechanism for delivering documents between libraries. OCLC PICA has taken a look at how Odyssey may work with VDX.

-The Demonstration of NCIP was impressive and showed the processing efficiencies to be gained by libraries using NCIP compliant interlibrary loan management and circulation systems.

-A symposium on courier services. Jason will send group a link of different courier services

-Copyright Section 108 Federal Register– discussion about guidelines that need to be answered.

OLD BUSINESS

CSU ILL – Sherry spoke with Marvin Pollard and Gordon Smith from the CSU Chancellor's Office for Information Technology Services at ALA midwinter about the possibility of using some technical solutions to improve the quality of interlibrary loan requests between CSU/UC, e.g., have CSU check UC holdings via Melvyl before sending an ILL Request and perhaps have UC and CSU use each others SFX API to find electronic holdings. It was proposed that these solutions could be in place for Fall 2007. This would be in addition to the work CSU and UC are doing to resolve policy issues, such as a reciprocal ILL agreement.

RSC/IAG group to talk with ILL colleagues addressing technical issues surrounding CSU/UC ILL processes. Please send concerns to Sherry by February 16th.

Odyssey Exploration – Gary

UCSB and UCSD did testing with the free Odyssey scaled down version which was found unacceptable as a replacement for Ariel given our users' expectations for the DeskTopDelivery service. There's a more robust version of Odyssey that's bundled in ILLiad and perhaps this merits further consideration given that OCLC has the rights to sell ILLiad and Fretwell-Downing is now OCLC-PICA.

Review and revise UC ILL Loan Code – Denice

The Directory of ILL Units and Manual of ILL Policies and Procedures on the IAG Web Page <http://libraries.universityofcalifornia.edu/rsc/iag/index.html> needs updating.

Denice volunteered to update the Policies page if everyone would review their policies and send her their updates by 2/28.

It was suggested the group could update areas of this page incrementally.

NEW BUSINESS

NLM – Support for ISO – Bob

-NLM is pulling their support for ISO. NLM had three customers and had to make budget cuts. What are UC's next steps? Bob will talk with other DOCLINE UC's.

-Bob asked for a round robin from UC's regarding the Zportal release to their patrons.

Released: UCSB, UCLA following UCSB model

In test with some end users: UCM

Preparing for Zportal: UCD, UCSF (target April)

Not ready to use: UCI (users see ILL status via AntPac), UCSC

Not yet using VDX for borrowing: UCB, UCR

Bob will talk with other DOCLINE Libraries about Zportal release.

Bob will investigate the possibility of representing DOCLINE requests in Zportal,

UC ILL Springtime Meeting Schedule – group

Some discuss about having a consolidated meeting of all ILL units. Possibly next year using Web Conferencing since it would be too costly for all to meet in one place

Southern ILL will meet at UC Irvine on March 26th

Northern ILL meeting to be determined. Charlotte will send that information out.

IAG Meeting Schedule – Group

April 12 – 1-3

July 26 – 1-3

Oct 18 – 1-3

VDX/JAVA Reports – Gary

What kind of reports do we want to use? Please reply to Gary by March 7th. . OCLC PICA has asked its users to submit report templates (drafts) for possible incorporation into a comprehensive set of reports built in Jasper Reports, a Java reports program, by OCLC PICA staff. UC staff should send to Gary examples of the kinds of reports you would like to see, and Gary will add this info into the templates. He needs the fields of interest and the type of presentation you would like to see