

**University of California Interlibrary Loan Advisory Group (IAG)  
To the Resource Sharing Committee Conference Call Minutes –  
Thursday, 26 July 2007, 1-3 p.m. (Approved 10/15/2007)**

Present:

Charlotte Rubens, UCB;	Kymerly Goodson, UCSD ;
Sherry Willhite, CDL;	Aleta Asbury, UCSF;
Jason Newborn, UCD (Minutes);	Scott Hathaway, UCSB;
Pam La Zarr, UCI;	Gary Johnson , UCSB (Chair);
Linda Michelle Weinberger, UCI;	Sherry and Sarah, UCSC;
Bob Freel, UCLA;	Jon Edmondson, SRLF;
Denice Sawatzky, UCM;	Jutta Wiemhoff, NRLF;
Ann Harlow, UCR;	Patricia Rose Harrington, Stanford;

1. Approve Agenda and call for additional items  
No additional items  
Agenda approved
2. Approve Minutes from April 12<sup>th</sup>  
Approved
3. Inter-UC recharge/reconciliation proposal and discussion ( Kymerly/Pam/All)

Kimberly brought a proposal, penned by Laura Chipps, to standardize the practice of recharging other UC campuses for the replacement of lost and overdue material. This is a difficult issue because it interacts with a wide range of campus policy and practice and exposes key differences between campuses. Kimberly and Laura were commended for producing an excellent proposal from which to build. Specific issues were raised for, against, and in-addition-to the proposal:

- Pam noted that Irvine's interlibrary loan had been working with their circulation to automate billing for on-the-fly records created to circulate VDX material. The concern came up out of this discussion that the UCI default replacement of \$50 dollars was problematic in light of much higher default charges at other campuses. UCB has recently announced an increase to \$150 dollars for default replacement.
- The issue of replacement copies was raised. Several campuses expressed a strong desire for the option to acquire a replacement copy rather than paying a replacement fee. The discussion exposed significant variation in policies for replacement copies. Most campuses will accept them. Several accept them but charge additional processing fees. Davis requires that such replacement copies be examined by the UCD selector before determining acceptance.
- Charlotte raised the issue of availability of replacements over time. If a cycle or schedule of replacement billing is developed, would a longer cycle time reduce the likely availability of material being replaced?
- Charlotte suggested that a 4<sup>th</sup> category be added to the definition section – Overdue Recalls, especially for reserves.

Action – Start a working group to include Jason, Bob, Pam, Scott, and Laura Chipps, charged with developing a set of Guidelines and Minimum Standards for intercampus recharges

#### 4. RSC- report (Gary for Eric Forte, and Charlotte)

Charlotte: Safety training in South, Earthquakes, Shooters UCSD.  
CSU peer to peer is stalled, Sherry will be contacting Marvin Pollard.  
The Copyright Clearance Center is offering a Webinar on Aug 18<sup>th</sup> covering their new academic blanket license product.  
No action items for IAG.

Gary: Eric Forte is stepping down as the RSC chair. He has accepted a position at Boise State University, Idaho. Marlayna Christensen will be the new RSC chair.

#### 5. CDL report (Sherry)

Sherry reported on the implementation of the patron initiated override for items the system flags as locally available. They have distributed testing protocols and plan for 5 days of testing with ILL staff followed by a 10 day test period for public services. Sherry noted that there is a high degree of control of the end implementation of this feature – thus, opt-in – including different levels of routing and the option to turn the feature off completely

The Z-portal roll out is continuing.

The VDX version 3.1 has been withdraw from release by the vendor, Re-release is expected in September. CDL will not be among the initial adopters of this release. This release will require an upgrade to Oracle X.

#### 6. VDX TaskForce report (Gary/Sherry)

There has been no word from SOPAG on longevity of the VDX taskforce. The group is currently meeting once a month and has been productive.

The committee developed a strategy for VDX and Z-portal enhancement voting and several of our important enhancements were selected for development.

Peer to peer ISO operation has been initiated with the Library and Archives of Canada.

#### 7. Archiving schedule of VDX items revisited

Completed items have currently been archived up to the end of 2004. (Completed items are either copy-non-returnables that were received by the borrower or returnable items that have completed their lifecycles by being checked-in at the lending library.)

Arguments against the implementation of the current archiving schedule include:

a)Records are needed for Copyright Clearance Center reconciliation. Irvine noted this task is performed yearly after the end of the calendar year.

b)Records are needed for Fiscal Year Statistics.

Charlotte posited that these concerns would be much less urgent if a method was developed to access archived files. Gary indicated we will probably know more by our October in-person meeting about programs being currently developed which may allow exporting an institution's records or retrieving records from the archive. (Please take Gary's wording on this if he has submitted anything). Gary indicated that the ability to retrieve and export information from VDX other than by the CDL Reports Utility is being actively developed by OCLC-PICA. (See #10 below for more details)

Action: Stop archiving until the October in-person meeting

8. Direct ISO with other institutions policy [draft]proposal. (Bob/Denice/Gary/Jason)

Approved for forwarding to RSC.

Action: Charlotte will forward to RSC.

9. RSC-IAG Webpage: Directory/Policies/Manual of... update/discussion - special attention to Part H. Packing and Shipping Guidelines (Denice/Gary/Jason)\

The updates to the Directory of UC/Stanford ILL Units on the IAG web site were approved for uploading.

Jutta is concerned about poorly wrapped material in Tricor bags. Bob and Gary recommend a broadcast reminder to use these guidelines particularly padding/bubblewrap for bags.

10. VDX Jasper/JAVA Reports update (Gary)

OCLC PICA will be developing reports. Templates will be available within a few months. The scheme underway utilizes open source software, Jasper Reports and I-reports, to accomplish this goal. In preparation for developing a set of common reports for all OCLC-PICA's customers to use, OCLC-PICA asked for examples of the types of reports needed by its VDX and Zportal sites worldwide. UC submitted the following five basic report types including specific data elements to OCLC-PICA in May 2007 for their consideration.

The five reports including

Report 1: Overdue Report for lender

Report 2: Overdue Report for Borrower

Report 3: Patron's borrowing request details report predicated on a date range

Report 4: Collection Development report predicated on classification (call no.) if available

Report 5: Copyright Clearance Report

Since templates are being developed by OCLC-PICA for all its customers to use, OCLC-PICA will decide which reports are most relevant. Once the templates are built, then we can customize them for our local needs, including variations for each campus.

According to Ralph Horton at OCLC-PICA the templates should be ready around mid to late September 2007. Information and instructions for installing Jasper Reports and I-reports will be sent to CDL with the expectation that CDL will be hosting the servers.

11. ILL Services to onsite visiting UC faculty (Charlotte)

Charlotte was curious about the differences in policy regarding eligibility for Interlibrary Services by non-local UC-affiliates at UC campuses which are not their home campus. She suggested we codify this, and the group agreed.

Action: Charlotte will create a grid of users to poll the various campuses. She requests responses by August 10th.

12. UC-OCLC Next Generation Melvyl Pilot (AKA: UC-OCLC WorldCat Local Pilot)  
(Charlotte / Gary)

This UC / OCLC partnership is attempting to get a pilot up by January 2008 Or soon thereafter. The project website is located at

[http://libraries.universityofcalifornia.edu/about/uc\\_oclc.html#intro](http://libraries.universityofcalifornia.edu/about/uc_oclc.html#intro)

The Executive team is a subset of University Librarians.

Implementation team includes a variety of staff, from UC and OCLC. Charlotte is working with groups focused on Resource Sharing/Delivery Services. The first goals for the pilot are to have Worldcat Local and CDL Request be integrated so our users will be able to make interlibrary loan requests, and to have a way for WorldCat Local to allow users to place and cancel holds for material through the campuses' individual circulation system. Charlotte noted that Jenny Lee from UCLA is leading the UC Request /Resource Sharing Team, which also includes Sherry Willhite, Michael Thwaites, Gary Johnson and Linda Weinberger. Gary Johnson is leading the UC Circulation Transactions Team, which includes Kymberly Goodson, Penny Bertrang, and Carl Hunt. Jenny, Gary and Charlotte also serve on a joint UC/OCLC Delivery Services Group. The University of Washington is running the first pilot of Worldcat Local, so people can go to their site to see the current beta test version (<http://www.lib.washington.edu/>)

13. Ariel - Document Delivery - NISO news (Gary)

Given Infotrieve's inattention to its product, alternative solutions are being considered at the national level by the RUSA-STARs Vendor Relations Committee. One very promising approach is engaging NISO in establishing a standard for a document delivery system. A document entitled, "Resource Sharing Document Delivery System (DDS) Functional Requirements" was formally submitted to the Managing Director and Standards Program Manager at NISO on Sunday, June 24<sup>th</sup> 2007 by Gary. The following day he spoke with the RUSA-STARs Executive Committee about the Ariel situation and the possible approaches, including the most recent tact of engaging NISO. Developing a standards based solution for document transmission between resource sharing entities was strongly endorsed by STARs Exec and the Vendor Relations Committee was encouraged to actively pursue this approach. Though no immediate support was needed from STARs Exec, they are willing to help if asked. NISO accepted the Functional Requirements document and will be forwarding it to a new committee entitled, "Discovery to Delivery." In the meantime, though, Infotrieve has formally responded in writing to the Ariel Academic Advisory Group that they will continue to sell and support the product.

14. Date and Location of RSC-IAG in-person meeting on October.

Ann Harlow has offered to host the in person meeting at the Riverside Science Library on Monday, October 15<sup>th</sup>.