

IAG In-Person Meeting : UCOP, November 5, 2008

Attendees: Sherry Willhite, CDL; Alison Ray, CDL; Charlotte Rubens, UCB; Jason Newborn, UCD (Chair); Pam La Zarr, UCI (recorder); Linda Michelle Weinberger, UCI (recorder); Bob Freel, UCLA; Denice Sawatzky, UCM; Jutta Wiemhoff, NRLF; Ann Harlow, UCR; Kymberly Goodson, UCSD; Aleta Asbury, UCSF; Gary Johnson, UCSB; Scott Hathaway, UCSB; Josh Alpers, UCSC; Sheri Kurisu, UCSC; Jon Edmondson, SRLF; Rose Harrington, Stanford; Mary Morill, Stanford

Agenda:

1. RSC report – Charlotte Rubens
2. CDL report – Sherry Willhite
3. Next-Gen Melvyl report – Sherry Willhite
4. CCC copyright spreadsheet – Pam La Zarr
5. TEPS-NPM requirements and tactics – Jason Newborn
6. Respecting shared resources: Recall response and consequences – Charlotte Rubens
7. Lost materials and RLF persistence policy – Jutta
8. Categorical statistics for ARL, etc. – Jason Newborn, Sherry Willhite
9. IAG goals – Jason Newborn, Bob Freel
 1. Discuss measuring and reporting on the impact of Next-Gen Melvyl on ILL traffic
 2. Explore performing and implementing a UC-wide customer satisfaction survey
 3. Review current shipping needs and the Tricor MOU
10. RLF processing within CDL Request, VDX, and external OCLC ILL – Jason Newborn
 1. Locations Codes (SRLF paradigm)
 2. Local holdings (NRLF paradigm)
 3. Local holdings in OCLC in general
11. VDX document delivery – Sherry Willhite
12. Discussion of Chair/Co-Chair practices for IAG
13. Selection of Co-Chair for 2010

1. RSC report --Charlotte Rubens

- Aleta Asbury is the new RSC representative to IAG.
- RSC/CAG is designing a Disaster Recovery Workshop, tentatively planned for spring break 2009. They hope to have an onsite presentation, web cast, and videotape. More information will be forthcoming on the RSC web site.
- Direct ISO ILL Policy. After discussion, RSC has requested that IAG revise the Direct ISO ILL Policy statement to include an Introduction which defines and outlines the problem and provides a recommendation.

Action Item: Charlotte will communicate with Jason and his group to redraft the Direct ISO ILL Policy before the next RSC meeting in January 2009.

- RSC will have a discussion in January about the Rethinking Resource Sharing Manifesto. See: <http://www.rethinkingresource-sharing.org/manifesto.html>

Action Item: IAG reps will prepare for a discussion about the document during our January IAG conference call.

2. CDL report -- Sherry Willhite

- Sherry reminded everyone to update the holiday suspension calendar in VDX.
- The problem requiring staff to do the one extra step for VDX BibSearch of WorldCat records has been fixed. If you continue to see a prefix before the OCLC number, please send a screen shot of the problem record to: vdxtrouble-l@ucop.edu
- Sherry and Alison have completed visits to the 5 southern UC campuses. Many ILL units have employed workarounds to compensate for unreported “bugs.” We are urged to report these problems to: vdxtrouble-l@ucop.edu

Action Item: All ILL staff are encouraged to report VDX problems or “bugs.” Include the VDX ILL number, a description of the problem, and the resulting impact on the workflow.

- Allison is working on a VDX FAQ in HTML format to be posted on the *Inside CDL* web site.
- Sherry is working on posting a list of VDX known “bugs” on the *Inside CDL* web site. CDL and OCLC are utilizing monthly phone conference calls to discuss and resolve VDX/OCLC issues.
- Problems with dates from the Citation Linker forms into VDX should be resolved by the week of Nov. 10.

3. Next-Gen Melvyl report -- Sherry Willhite

- At present, the [Next-Generation Melvyl Pilot](#) utilizes the UC-eLinks button to enable patrons to use Request. CDL hopes to have the Request feature directly integrated into Next-Gen Melvyl during Spring 2009.
- The user interface is being refined to retrieve search results more easily.
- VDX supports NCIP; UC Davis is testing NCIP with WorldCat Local/Next-Gen Melvyl to obtain circulation information.
- We are all encouraged to use the Feedback link, “Tell Us What You Think.” Both CDL and OCLC get the feedback. Alison and Jayne Dickson answer the questions posed.

4. CCC copyright spreadsheet -- Pam La Zarr

- The CCC – TRS Volume Purchase spreadsheet was distributed to IAG reps. Campus account and personnel information should be verified and updated.
- The consortia discount reduces the processing fee per granted transaction from \$3. to \$1. Since the implementation of the program, UCI has saved \$564. Savings UC-wide would be much more.

Action Item: Updates for campus account and personnel information are due to Pam by Nov. 18.

- Jason reported there is discussion at UC Davis regarding information received from CCC regarding CCC's Annual Copyright License.

Action Item: Jason will forward information to IAG from UCD regarding the email discussion of CCC's Annual Copyright License.

5. TEPS-NPM requirements and tactics -- Jason Newborn

- Our vendor, the Taiwan Electronic Periodical Services (TEPS), is interested in learning the extent of titles involved in this project that have been requested through ILL. UC Davis did not do any Lending transactions of the listed titles during the initial reporting period.
- Jason suggested creating VDX filters of both service types to collect this data. Asian language librarians/bibliographers may be involved to help eliminate languages and titles that are not part of TEPS.
- CDL will continue to explore ways to get the title lists, perhaps using the list of journal ISSN's. The TEPS titles are now in OCLC.

Action Item: Sherry will email the data to Jason. Jason will provide detailed instructions on how the ILL units can provide the statistics from VDX.

Action Item: IAG encourages our entry into data collection when there is a proven mechanism to provide Collection Development information.

6. Respecting shared resources: Recall response and consequences – Charlotte Rubens

- Charlotte expressed frustration about the length of time it takes for recalled items to be returned to UCB. Her staff collected data from February – June 2008.
- 30% of the items recalled took more than 2 weeks to be returned.

- The tardy recalls have damaged relations with some UCB branch libraries. The Art History Library no longer lends on ILL; the Biology Library now lends for only a one month loan period.
- UC Berkeley goes to great lengths to return recalled items promptly.
- One unidentified UC ILL unit told Charlotte that as a last resort, they were not allowed to call the patron asking them to return an item recalled by the owning library.
- We need a path for escalation for getting recalled items back if the standard procedures do not work.

Action Item: Charlotte, Denice, Jason, and Scott will work on a Best Practices document for basic parameters we can all agree on for more proactive and effective recall responses.

7. Lost materials and RLF persistence policy – Jutta

- If a NRLF item is lost, the item needs to be replaced. According to the recommendations in the RLF Persistence Policy Implementation Task Force report, the Borrowing Library needs to make a good faith effort to replace the lost item. Jutta is aware that this policy may not be practical, as it would require special training and unusual coordination. For NRLF replacements, consult with Jutta.
- SRLF has the same policy, but variant editions need to be approved by a bibliographer before the replacement can be approved.
- In order to facilitate one of the goals of the RLF Persistence Policy (to ensure equitable access to and use of shared facilities), it is essential that Borrowing Libraries make an extra effort to return RLF material in a timely manner, encouraging their patrons to bring back items when they are due.
- RLF materials are no longer de-accessioned and returned to the owning campus, excepting non-circulating materials. Instead, RLF items are checked out to the depositing campus on an indefinite loan.
- Recently, a lot of NRLF material requested by a non-depositing ILL was returned to the owning campus in error (instead of returning them to NRLF), where they were checked in on VDX by mistake and shelved on that library's shelves. Return items directly to NRLF and not to the depositing campus. Unfortunately, a "bug" in VDX allows for a non-requesting campus to check in an incorrect book. There is an urgent priority for OCLC to fix this problem and a related problem which allows us to receive other campuses ILL books. At the same time, ILL units need to have local procedures to prevent this.

8. Categorical statistics for ARL etc. -- Jason Newborn, Sherry Willhite

- CDL will provide programmer time in February 2009 to work on archiving VDX records. 2006 completed VDX transactions will be archived in May 2009.

- Other important statistical reports may be requested also. For example, the University Librarians want to know how much Lending we do for other UC campuses. Collection Development reports may be developed, as well as a user-interface to produce customized group reports for Lending and Borrowing. An interface may be created to allow bibliographers to create their own reports.

Action Item: Gary will send the Jasper Reports “Wish List” for additional statistical reports to IAG. A Working Group of Gary, Jason, Bob, and Charlotte will formulate and provide examples and information to RSC in January 2009.

9. IAG goals -- Jason Newborn and Bob Freel

- Discussion continued on the three items identified during the July conference call:
 1. Discuss measuring and reporting on the impact of Next-Gen Melvyl on ILL traffic.
 2. Explore performing and implementing a UC wide customer satisfaction survey.
 3. Review current shipping needs and the Tricor MOU.
- In addition, a fourth goal was suggested:
 4. Examine the Intercampus ILL Code, looking for gaps that might be more appropriately codified for the creation of an Intercampus RSC Code.

Action Item: Jason, Gary, Bob, and Charlotte will work on the impact of Next-Gen Melvyl, determining the data that will be measured and the mechanisms for measuring the impact.

Action Item: Kymberly, Bob, and Josh will work on developing a UC wide customer satisfaction survey.

Action Item: Tricor MOU review has been tabled for now.

Action Item: Charlotte and Ann will review the Intercampus ILL Code.

10. RLF processing within CDL Request, VDX, and external OCLC ILL -- Jason Newborn

- Location codes are under discussion, including clarification on the way materials are marked at the RLF's.
- SRLF currently lends to external users under the OCLC symbol “ZAS.” SRLF receives approximately 1,000 requests per month from non-UC ILL units.

- Policies and records are the big issues for the Next-Gen Melvyl Implementation Committee. The report will go up on the NGM site.

11. VDX document delivery – Sherry Willhite

- In January 2009 we expect CDL will enable VDX to provide DTD as an alternative to using Ariel or other software programs.
- Secure FTP is needed to accomplish VDX document delivery.
- VDX does not currently have secure FTP. OCLC will have to provide it separately.
- All ILL units are encouraged to install secure FTP on the workstations attached to scanners.
- Early pioneer users are UCSB, UCLA, and UCD.
- A centralized CDL server will be designated to host the VDX DTD transactions.
- Users will link into My ILL Requests and retrieve their DTD transactions immediately.

12. Discussion of Chair/Co-Chair practices for IAG

- After discussion, it was agreed we would discontinue the North/South Chair selection rotation.
- Bob will email proposed IAG 2009 conference call dates.

13. Selection of Co-Chair for 2010

- Bob Freel, UCLA, will be the IAG Chair for 2009. Kymberly Goodson, UCSD, will be the 2009 Co-Chair and 2010 IAG Chair.
- Each campus and RLF will rotate the Chair in the following alphabetical order starting in 2011.

2009 Los Angeles

2010 San Diego

2011 Berkeley

2012 Davis

2013 Irvine

2014 Los Angeles

2015 Merced

2016 Northern Regional Library Facility

2017 Riverside

2018 San Diego

2019 San Francisco

2020 Santa Barbara

2021 Santa Cruz

2022 Southern Regional Library Facility