**INTERLIBRARY LOAN ADVISORY GROUP (IAG):  UNIVERSITY OF CALIFORNIA**
July 21, 2010:  MINUTES

PRESENT:

Janet Moores (UCR), Kymberly Goodson (Chair, UCSD), Jenny Lee (UCLA), Alita Asbury (UCSF), Josh Alper (UCSC), Sarah Troy (UCSC), Jason Newborn (UCD), Rose Harrington (Stanford), Gerry Lopez (UCI), Scott Hathaway (UCSB), Denice Sawatzky (UCM), Jon Edmondson (Recorder, SRLF), Jutta Weimhoff (NRLF), Charlotte Rubens (UCB), Leslie Wolf (CDL).

ABSENT:

Linda Michelle Weinberger (UCI), Vince Novoa (UCR).


**AGENDA:**

1. Announcements
2. New Web Editor for IAG: Kymberly
3. RSC Update: Charlotte
4. CDL Update: Leslie
5. Any investigation or moves toward charging for any part of ILL service?: All
6. Questions about wrapping items going to UCSC: Jutta
7. Fall IAG in-person meeting
8. Ariel vs. Relais: Janet


**1. Announcements**

- Greening ILL report was sent in to RSC after feedback from IAG was received.

- UC ILL training check list: Jenny is taking over for Bob Freel, and Alicia is also assisting writing up this document. It would assist with training staff across the UC for ILL issues. IAG will follow up on how this is going at the next meeting.

**2. New Web Editor for IAG: Kymberly**

- Kymberly is doing this now, but IAG agreed it should not be the responsibility of the chair.
- It entails editing web pages and maintaining the listserv, updating policy pages and membership, loading minutes and agendas, etc.
- IAG agreed it would be best for this to be a regular responsibility of the vice chair.
- Kymberly will make a few last changes, and then train Charlotte as the current vice chair to take this on.

**3. RSC Update: Charlotte**

- The Shared Print Steering Task Force is now disbanded, and has submitted their report.

- The emergency listserv has started now, and has been pretty quiet so far. Contact your RSC representative to get on the list.
- RSC talked about in-person meetings and reported that there was a consensus from CAG members that they couldn't get funding. RSC was not sure if CAG members had asked for funding. RSC stressed to AUL's the importance of in person meetings.
- The Green ILL document for which IAG submitted feedback was discussed.
- IAG goals for next year are not put together yet, so IAG has no new assignments at this point. Maybe there will be a review of ILL loan policies and Tricor discussions in the future.

## 4. CDL Update: Leslie

- The VDX 4.1 upgrade is on schedule, for a general release on Aug 1. Leslie hopes everyone is currently doing testing. The ILL Operations Team has a weekly call with OCLC, and has done lots of testing already as well. Things are going well.
- Some improvements were outlined by Jenny, Scott, and Jon of the ILL Ops Team:
  - Pressing enter instead of clicking submit, which works in most scenarios.
  - There are two kinds of notes, public and private, which also helps going paperless.
  - There is a change in how you do rota, and a small problem if you want to enter a code twice, which entails a change in procedure.
  - Trying to enter call numbers can be problematic and is a little more work.
  - User alerts have changed, but documentation will be coming out.
  - Complete is now an action, not an authorization status, which changes filters procedures. Scott will look more into filters and help with documentation.
  - Un-shipped and un-received are new actions.
  - New things in z portal: Patrons can see completed requests only until the patron privacy scripts run (30 days after completion).
  - Team likes the look of VDX 4.1, the basic functions are the same, very intuitive.
- ISO related issues are a concern, but we can't we really test them until we are in production. We want to see what happens when we go live.
- Brokering is not able to be tested either. However, Debra Bartling will set up two CDL accounts that team members can hopefully test in before we go live.
- User alerts, specifically the ad hoc user alert is good; some have tried using it with mixed results, but we will have documentation on that as well that will hopefully clear things up.
- Able to scroll through work queue fields like renewals, making it easier to work on requests.
- "Expiring today" items in work queue are a plus.
- VDX 4.1 lending procedures in general are problem-free.
- IAG members and their staff need to report on what procedural documentation you would like to see, and what training you would like to get. Please feel free to give feedback.

## 5. Any investigation or moves toward charging for any part of ILL service? Round Robin

- UCB is not charging for ILL at this time.
- UCLA is looking to see if lending money plus intercampus funds can support all of ILL, not just lending. They want to see if they need to charge for borrowing to support it. Most people don't want to see charges, especially librarians. It's unclear at this point what will happen, staff are just giving recommendations. Jenny says it has been a great learning process.

- UCSD is not charging for ILL at this time.
- UCSC opted not to charge after negative feedback from faculty.
- UCD hasn't considered charging, but is coming up with stats on un-picked up items. They are considering making some charge if borrowing outside UC for a fee is needed. It's very easy to place a request, and patrons don't necessarily think of costs. They might send out an alert telling patrons how much items will cost to borrow before proceeding to for-fee lending institutions. There would be workload implications.
- UCM doesn't charge, and goes anywhere to obtain requests.
- Stanford does not charge, and is a member of SHARES, which is all free.
- UCI undergrads can't borrow from out-of-free area.
- UCR doesn't charge up to $45.
- UCSB doesn't charge and goes anywhere to obtain requests.

## 6. Questions about wrapping items going to UCSC

- The existing policy directory states that all items going to UCSC should be wrapped all year. This will be changed to say that all UC's should only bag items during the rainy season.
- There was a discussion about packing material and bags, etc. Some members thought the heavy plastics bags that Tricor supplies make great bin liners in general, providing protection from water and also adding cushioning.

## 7. Fall in person IAG meeting

- Kymberly will follow up by email.

## 8. Ariel vs. Relais: Janet

- UCR was curious if any other UC is using Relais besides UCLA and SRLF?
- UCSD purchased it some time ago, but has been waiting on customization from Relais and has not yet begun using it.
- UCSF has it, but is not using it, but may start to use it in the future. Aleta will call Jon at SRLF to see what she needs to do to get Relais working.
- New doc delivery feature in VDX is able to work with Relais and Ariel, and should work with anything that can upload image files. We should also be able to upload online article pdf's directly into new VDX doc delivery feature according to Jenny. It was also noted that Relais can send directly to Ariel as well as sending to an email address under certain IT configurations, so you don't necessarily even need Ariel.