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UNIVERSITY OF CALIFORNIA
INTERLIBRARY LOAN ADVISORY GROUP (IAG)
October 21, 2010 Meeting Minutes
U.C. Berkeley, 303 Doe Library

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PRESENT:

UCB: C. Rubens (recorder); **UCD**: J. Newborn; **UCI**: G. Lopez & L. Weinberger; **UCLA**: J. Lee; **UCM**: D. Sawatzky; **UCR**: J. Moores; **UCSC**: J. Alper; **UCSB**: S. Hathaway; **UCSD**: K. Goodson (Chair); **CDL/UCOP**: L. Wolfe & D. Bartling; **NRLF**: J. Wiemhoff; **SRLF**: J. Edmonson; **Stanford**: R. Harrington

ABSENT:

UCSF: A. Asbury

AGENDA:
1. **Roll Call** (see above)
2. **Campus Updates** (see attached at end of minutes)
3. **RSC Update**
4. **CDL Update**
5. **VDX 4.1.1. Features & Functionality**
6. **RLFs Issue**
7. **UC-Wide Training Checklist/FAQ**
8. **ILL/Acquisitions Program: GIST**

3. RSC Update – V. Novoa was not present, but C. Rubens noted that RSC had not met since the last IAG conference call, so there was nothing to report. The RSC call is scheduled for November 18.

4. CDL Update –

D. Bartling described the ILL Operations Team and their work:

- Implemented VDX 4.1 – took 4 months.
- Next upgrade – may take longer because of switch to Unicode.
- Working with OCLC regarding the roadmap for VDX development. UC requirements must be submitted to the ILL Ops Team and OCLC. Since Windows client will be eliminated in the future (except some administrative functions and a few other things), UC needs currently met with Windows version should be communicated to VDX-L, when the team solicits input.
- Phase II of e-document delivery and migration from process status to action (discussed further during 5, below).
- JReports – suggestions should be sent to VDX-L. The roadmap includes giving symbols as well as institutional "descriptions."

L. Wolfe collected a preliminary wish and problem list from the group, including:

- AQ service in NGM does not work well, especially for monographic series and locations. It is especially problematic for the RLF's because the Requests from the AQ service include locations which are not relevant (i.e. some vols. on campus and others at an RLF)…the AQ

seems to only be looking at the title. The false leads are a problem for staff on the campus as well as at the RLF.

- RLF's need to know the origin of the request (if it was staff-mediated or "auto"-machine mediated). Jason will check whether this has been addressed.
- Staff requested an explanation or flow chart of the AQ service.
- "Papers" or "Proceedings" list first – look like a book, but is often just a chapter or not a book.
- Diacritics and other representations with strange characters disrupt searching – upcoming Unicode fix should help with this.
- J-Reports: A) can we look toward being able to search just the fields we want? B) can an automatic statistical report be developed for "Schedule C" of the UC reports, since we all have to complete it?
- Interoperability with circulation systems, especially re: patron records?

ACTION: IAG members should send ideas and requests to the IAG List.

5. **VDX 4.1.1**.

- VDX Document Delivery – J. Lee demonstrated this new capability which will become available within the next 4-6 weeks. Webinar training will be scheduled for sometime in November. UC campuses can opt in or opt out for this. After the pilot, CDL, Jenny and Scott will discuss necessary changes, documentation or problems and resolutions or workarounds which are needed.

ACTION: If a unit wants to send their Ariel received queue from outside the UC's to this service, contact Jenny, Scott, VDX-L: or VDX-Trouble-L to set it up.

- Ad Hoc, "Send User" Alert, and Site Actions – S. Hathaway noted that Site Actions are used to trigger User Alerts. They are a replacement for Process Statuses, which will go away in a future version of VDX. At this time we cannot use Site Actions with Bulk Action. There will be UC-wide Site Actions developed, then campus-specific ones, which will be created by CDL at the campus' request.

ACTION: Scott will send the slide presentation to the group.

ACTION: CDL will finalize the UC-wide list and consult with the Ops Team to formulate the procedure for setting up campus Site Actions.

6. **RLFs Non-Duplication Policy -** J. Edmondson and J. Wiemhoff explained the policy took effect July 1, 2010, and that it does not apply to non-circulating items.

7. **UC-wide Training Checklist & FAQ –** J. Lee is working with a group on these.

ACTION: Jenny and the group will draft the information regarding turnaround time, reserves, and a few other items, and will bring a draft back to IAG. Beta testing by a few units will be distributed for the January 2011 call.

8. **ILL/Acquisitions program called GIST –** The Information Delivery Services (IDS) Project of New York has developed GIST, the Getting It System Toolkit, to optimize and integrate acquisitions and interlibrary loan request workflows using one interface. See their complete description: http://www.idsproject.org/Tools/GIST.aspx. J. Lee reported on a recent study completed at UCLA which indicated on average now an ILL costs $38. This tool may provide help in telling what may be cheaper to purchase, ahead of the ILL workflow. Further investigation is needed.