

**University of California,  
Interlibrary Loan Advisory Group (IAG)  
July 26, 2012 Minutes**

**Present:**

CDL/UCOP – L. Wolf; Stanford – R. Harrington; NRLF – J. Wiemhoff; UCB - C. Rubens  
UCD - J. Newborn (Chair); UCLA - J. Lee; UCM - D. Sawatzky; UCR - V. Novoa & J. Moores; UCSD – J.  
d’Arnaud ; UCSB - S. Hathaway (recorder); UCSC – J. Alper; UCSF - A. Panado

**Absent:** UCI – G. Lopez & L. Weinberger; SRLF – J. Edmonson

**Passing the Baton, 2012 / 2013:** Jason Newborn (UCD) is the new IAG Chair, and Gerry Lopez (UCI) is Vice-Chair

**Approval of final Minutes from the April 26 meeting.**

The minutes from the April 26, 2012 meeting were distributed and approved. Gerry will post.

**RSC Update from July 24 Conference Call (Vince)**

New Representatives: Ann Frenkel, HOPS liaison to RSC Andy Panado, UCSF Kari Lucas, RSC liaison to CAG Kristine Ferry, RSC liaison to HOPS LAUC representative for the next year is uncertain.

Leslie Wolf gave a report on the ALA VDX Users Groups meeting (see added information at the end of these minutes\*)

There was a discussion about Shared Print In Place (SPIP)

RSC & HOPS are looking at local rules general ILL, ILL media, special collections, and associated due dates and loan rules. Gary Johnson, Amy Kautzman, and Catherine Friedman will be sending out a report on this soon.

The RSC charge was reviewed, there were no changes.

Claudia Jimenez, current RSC representative for UCSB, is now the courier coordinator.

**CDL Update (Leslie)**

The migration to OCLC hosted VDX occurred the weekend of July 13 – 15. The transition went smoothly for the most part. CDL is currently in week two of the 30 day “acceptance period” for OCLC hosted transition.

Some trouble tickets were posted after the system went live, and CDL / OCLC have worked through and solved the majority of the problems. One current and sporadic glitch is the inability to print from the Windows client via RDS, which may be affecting certain workstations due to virus protection protocols. OCLC is working to isolate and solve this problem.

OCLC is working on creating notices for invalid document deliveries. Another ongoing problem being addressed is the failure of color scans posting to Document Store. Leslie stressed the importance of reporting problems in this and other areas to VDXTrouble.

When hosted VDX is deemed stable, CDL and OCLC will begin preliminary work on the migration to VDX version 6, skipping version 5.

## **CRL and RapidILL (Charlotte)**

Background: Jane Smith (Coordinator of RapidILL at Colorado State University) sent an email to CRL member campuses, asking that a questionnaire be completed so that these ILL units could be set up in RapidILL to submit requests (borrowing only) to the CRL / Linda Hall Library partnership via RapidILL for free fulfillment (the assumption is that the member campuses completed the questionnaire). There was a general air of confusion as to what this all means. Some points made were:

- Can VDX interface with Rapid, and what sort of programming does that entail?
- Will we need to use Rapid for copy requests to CRL, or is it only for Linda Hall Library article requests?
- If VDX cannot be set up to interface with RapidILL, will we be able to use the Rapid module directly?

The pre-assumption discussed was that requests to CRL could continue to be made via OCLC WCRS, but that if this was used for Linda Hall Library requests (LHL) we would be charged. The point was also made that no programming was likely in VDX at present due to the recent migration and the need to maintain stability in the database.

**ACTION ITEM:** Leslie, Jenny, and Jason will be in contact and formulate questions that will be asked of RapidILL and CRL / LHL as to the exact terms of this process.

## **Services to remote users and/or students in online courses (Charlotte)**

In response to the growing number of online courses: What UC-wide services will be provided for remote users? (Jason sent a pre-meeting email on July 25 to the IAG list querying the units on their current practices and policies regarding this matter)

Results of a round robin recitation of the current practices by campus:

**UCB:** Charlotte indicated that although online programs were growing, there didn't seem to be a great need for ILL services from the participants.

**UCD:** Most online courses are designed with online support in place, so ILL is not generally needed. As for users at research stations such as the Bodega Marine Lab, Kearney Agricultural Center, etc, UCD supports those programs via delivery of returnables to the remote facilities.

**UCI:** Members were not present.

**UCLA:** No returnables are delivered off campus.

**UCM:** Has delivered some returnables to the Fresno campus, but expressed dissatisfaction with the outcome.

**UCR:** No returnables are delivered off campus.

**UCSB:** No returnables are delivered off campus.

**UCSC:** Delivers returnables to remote facilities.

**UCSD:** No returnables are delivered off campus.

**UCSF:** No returnables are delivered off campus.

No campus currently delivers returnables directly to a home or non-UC affiliated address.

## **Requests for XXXer OCLC symbols not being routed to UC ILL units (we appear as non-lenders) – Do we want to make a proposal to RSC? (Charlotte)**

There was a discussion concerning the “substitutive” records in OCLC that employ the non-supplier UC library codes, most notably the xxER (Shared Cataloging Program) and xxxSP (Shared Print In Place) and the effect these are or may be having on ILL workflow and revenue generation. The OCLC records that contain only the UC SCP non-supplier codes create the following problems:

- Potential borrowers that are looking directly at these records skip placing the UC location in the lender string, as the SCP codes are non-supplier / non-referral.
- A great many borrowing libraries use and employ OCLC custom holdings to create automatic lender strings. The SCP codes are not included in custom holdings as they have non-supplier status.

SPIP location codes (xxxSP) will be suppliers, but libraries are not likely to add them to their custom holdings.

It was concluded that IAG needs to pin an argument about this situation and express our concerns to RSC.

**Action Item:** Jason and Charlotte will confer and draft an “explanation of concerns” about potential for lost revenue that will be sent to IAG for comments and then on to RSC.

### **Round Robin**

**UC Berkeley:** Will be going live July 30 on submitting borrowing requests for Lawrence Berkeley National Laboratory patrons, so UC lenders may now see requests for LBNL patrons. They are losing a staff member in the CUY lending section. 20% decrease in the (library?) budget points to a likely consolidation of library services.

**UCD:** They are in the early stages of reorganization, and it is likely that 3 of their ILL units will be consolidated into 2 (Health Science and Medical Libraries will become one ILL unit). Some ILL and Circulation staff members are leaving, but will be replaced, so they will be experiencing a staff shortfall in the months to come.

**UCLA:** Not much to report. They are losing a staff member in ILL and the position will not be replaced.

**UCM:** They are getting ready for the new semester. The library switched their ILS on June 20, from Millennium to WorldCat Management Systems. There have been some bugs, but they are slowly getting the hang of it.

**UCR:** ILL staffing is stable. August 1 they will begin using Accurate Courier for shipments to the CSU’s

**UCSD:** The Scripps Institute of Oceanography Library has closed. They will still be providing some library services to Scripps patrons at that campus and have dedicated a library staff member to overseeing this

process. They have received and begun using two Bookeye scanners, and they are happy with them thus far. The scanners are not yet integrated with Relais, and they are sending their scans via OCLC Article Exchange.

**UCSB:** Down 1 staff member in ILL, hope to replace by the end of August (due to the slow summer this has not caused many problems). The Davidson Library renovation and new building plans are moving forward, but Scott will have a much clearer idea of the timeline by the October meeting. On May 1, UCSB began using Accurate Courier for shipments to the CSU's. The transition has gone smoothly, and initial figures have indicated that we are saving a significant amount of money over shipping via Fed Ex.

**UCSC:** Down 1 staff member in ILL, will have two half-time staff positions coming in and hope to have them trained by fall quarter. The summer has been very slow.

**UCSF:** With A. Panado becoming acting ILL Supervisor, focus has been on him learning ILL operations/services. He asked for some feedback about Docline's compatibility with Windows 7 because his ILL unit staff is currently on Windows XP and IT has plans to migrate them to newer operating system.

**NRLF:** Not much to report, things are going smoothly.

There was also an added report by Vince: The Water Resources Collections and Archives has about 1,100 items that are going to be shelved at Cal State San Bernardino. Janet indicated that if any UC ILL unit has problems copies of those WRCA items at CSUSB they should contact UCR ILL for assistance. UCR prefers that requests for WRCA material be requested from OCLC using WCA.

#### **Dates for 2012 / 2013 Conference Calls**

Jason will send out to IAG for approval.

#### **IAG Parking Lot or Items deferred to the next conference call:**

Analysis of 2012 User Satisfaction Survey – Jenny will lead

Web Delivery Troubleshooting Guide – Jason

The Big Questions – Charlotte will lead

#### **\*Added information on the VDX Users Group meeting at ALA, 6/22/2012:**

Stopped supporting Wodiak as of February 2012 – all development is in Web interface

VDX 6.0:

- MnLink is testing 6.0
- August release – bug fixes
- November release – bug fixes, Article Exchange integration Phase 1 – lender side upload functions
- February or May release – Article Exchange integration Phase 2 – borrowing
- All Article Exchange workflow will be embedded in VDX

- They will add a patron interface pilot this summer
- Very little product enhancement unless it can be ported over to WorldShare ILL

WCRS migration to WorldShare platform:

- Sits on WorldShare platform
- Current beta winding down
- Migrating WCRS libraries to WorldShare ILL in groups
- By November 2013, close down access to create new requests in WCRS
- By December 2013, WCRS shut down

VDX migration to WorldShare platform:

- Conduct gap analysis starting July 2013
- Build in consortial functionality
- Pilot WorldShare ILL in a particular region
- Migration starting January 2015
- Complete migration by end of 2016

ISO-ILL:

- It's an old standard; doesn't sit well with today's technology
- It takes too much work to set up; dialogue-based. Need to avoid dialogue and just pull data into your application
- International working group to propose new standard
- ISO support for 5 years

Katie Birch will be happy to give a UC-only webinar in September

Upcoming IAG conference calls

Thursday, October 25th, 2012 2:00PM-4:00PM

Thursday, January 24th, 2013 2:00PM-4:00PM

Thursday, April 25, 2013, 2:00PM-4:00PM