

IAG Meeting Notes 2/19/13

Berkeley - Charlotte Rubens | Davis - Jason Newborn (chair) | Irvine - Gerardo (Gerry) Lopez | Los Angeles - Jenny Lee | Merced - Denice Sawatzky | Riverside - Janet Moores | San Diego - Judea D'Arnaud | San Francisco - Andy Panado | Santa Barbara - Scott Hathaway | Santa Cruz - Josh M. Alper(Recorder) | NRLF - Jutta Wiemhoff (Absent) | SRLF - Jon Edmondson | Stanford – Rose Harrington | RSC Liason - Vincent Novoa | CDL/UCOP - Leslie Wolf

1. Accurate Courier issues and reporting -- Sarah Troy

Accurate Update: Sarah Troy reported on the ongoing meetings between Accurate and the UC. The overarching goal of these meetings is to “create a successful working relationship between the UC’s and the courier. The meetings are taking place twice a month. This committee will start inviting a UC campus to attend one of these meetings once a month, (starting with UCSF on 2/25/12). During these meetings they are going to review the trouble tickets to recognize any patterns of problems. The meeting minutes will be published and sent to RSC.

We will be using Footprints to place trouble tickets to track problems instead of using the UC ILL e-mail list. Leslie reported that this ticketing system would be similar to the way we report VDX trouble style reporting mechanism...we will have to log-in to create a ticket and everyone on the UC ILL list will have access to log-in

Vince asked if we had heard any info about the Cal States having trouble with Accurate. Sarah’s contact indicated that they are content to keep using Accurate

Jenny asked when a report is placed in the ticketing system, will other campuses see it? Sarah asked if when a ticket was created would all UC get an e-mail or would we log-in and be able to see all the tickets placed? Leslie responded that they intend to have it set up so that we could all see if a ticket for a particular problem had already been created. We will find out more when a training is held on the Accurate ticketing system.

A draft service level agreement between the UCs and Accurate will be created over the next 6 months.

Claudia, our courier coordinator is drafting a letter to Accurate about the problems the UCs experienced during the holidays. Stephanie recognizes this was a problematic time and this letter will support her to help address the problems that came up. Andy asked about Accurate not knowing the holiday closure dates for the UCs since we had reported our holiday closures. Andy asked if we could have Accurate access the wiki to see the dates. Sarah answered that we can post the closure dates on the wiki and then export these dates as a pdf and send them to Accurate in the future.

Sarah instructed us to continue to report our problems with Accurate and to report them to our RSC reps. We can also e-mail Claudia Jimenez (the courier coordinator) OR you can e-mail

Sarah directly as well. When addressing courier issues in IAG we should invite Sarah or Claudia to the meetings for these discussions so they are aware of the problems that are occurring.

Judea noted that Stephanie has been getting ahead of reporting problems and has been warning when drivers are going to be late. Judea asked if we should still report these instances of lateness even though Stephanie has already warned and acknowledged the problem. Sarah encouraged us to still document the lateness.

Andy asked about the turn-around time after putting in a claim for the replacement lost book with Accurate. He had put on in 2 weeks ago. He was wondering how long it would take for Accurate to address the damage. The claim was for a lost book. Sarah will get info on the claim process and will share it. Sarah noted that she had put in a claim for damaged bins and Accurate paid for half the cost of replacing them. Leslie noted that we should include the claim policies in the service level agreement with Accurate.

2. Special Collections -- Janet Moores

Janet : UC Riverside Special Collections Dept. keeps a tally of all the copies/scans and once a year will charge the ILL department for these services. UC Riverside AUL for public services was curious if this happened at the other UCs.

2 questions

- a. Does anyone get charged by their Special Collections Department for copies/scans made by Special Collections of Special Collections material?
- b. Are there any page limits enforced by Spec. Coll. Departments on copies/scans of Spec. Coll. Material ?

UCB: Not aware of any charges. Have not contacted their Spec. Col. Department to find out if there are. If an ILL request comes in for Special Collections material, the ILL unit arranges for the scanning. Scott mentioned that he has seen a recharge from Bancroft for scans, but this is a charge for material provided to another UC from Bancroft and not an internal charge between Bancroft and UCB ILL. Charlotte noted that she is paying a student who is at Bancroft to do scanning so she will look into why Bancroft is also charging other UCs for supplying scans.

UCD: ILL does the scanning for the ILL of Special Collections material at UCD so no internal charging occurs. There is a 'soft limit' on the number of pages scanned for lending and it depends on the condition of the material. This limit is determined on a case by case basis. Generally, they will charge the borrowing library for scans over 30 pages...but they have scanned as much as 150 pages. UC Davis ILL has established a good relationship with UCD Special Collections as they have done a fair bit of scanning for the Spec. Col. Department.

UCI: ILL does not get charged by the UCI Special Collections Department. They have not seen a page limit enforced either.

UCLA: For regular Special Collections requests, UCLA ILL refers the borrowing library directly to the UCLA Spec. Col. Department. For the Arts library the scans are limited to 10 pages, but there is no limit for general Spec. Coll. Copy/scan requests

UCM: Not aware of having a Special Collections Unit and no charges are known

UCSD: No internal charges known, the limit on scans/copies is determined by the condition of the item, but not on the number of pages.

UCSF: Not sure if they get many requests for Special Collections material...usually they reject the request. Will try to get a more definite answer to this question.

UCSB: ILL Dept. does not get charged internally by the Spec. Col. Dept. The ILL unit does scanning of Spec. Col. Material. Condition of the item may limit the number of pages and they will not copy entire items that are restricted by copyright, however particular sections can be scanned/copied. Certain collections that aren't copyrighted can be copied in total.

UCSC: No internal charge from Spec. Col. To the ILL unit. Page limit is determined on a case by case. The Spec. Col. Unit does the scanning.

SRLF: Sends requests over to the Spec. Col. Unit at UCLA, they do not do any Spec. Col. Transactions.

Jason mentioned there had been concern that it may have been cheaper to place an ILL request to get Spec. Col. Material vs. the cost to access the material in person, however developing a policy for this would be addressing an outside exception and that it wasn't worth trying to solidify this policy

3. Rapid ILL for CRL and LHL - Jason Newborn

We did a round robin about how set the Rapid Account set up was going for the UCs

UCI has started using it and have been using it beyond just the LHL and CRL material during the initial free trial period. They have sent out 10 requests so far.

UCD noted the sales pitch nature during the set-up and mentioned how Rapid was miss-leading in that CRL is still going to be using OCLC so Rapid is not the only way to work with CRL. Noted that the service worked quicker than expected.

UCSB set up the service on their own. Also noted that Rapid was miss-leading in their claim that CRL would not be fulfilling copy requests through OCLC. Jason confirmed with Kevin Wilkes that CRL would still work with OCLC requests. Despite the miss-information from Rapid, the service itself works decent.

Andy asked if the software has to be installed in a workstation in order for it to work on that workstation. The answer was 'Yes'

UCSD set the Rapid service up in December but haven't used it too much.

It was noted that Rapid had wanted to have all requests for copies going through them but auto-routing of requests does not allow for this and a work around would not be practical

UCSC has Rapid set up but haven't used it too much at this point

UCI/UCD/UCR/UCSD/UCSB/UCSC all have Rapid set up.

UCI/UCR/UCSC have gone through the Rapid training

4. CRL volume count -- Jason Newborn

2 years ago Jason's boss was concerned about the amount of business UCD ILL had done with CRL. At the time they had sent 270 requests to CRL, however more recently they had only 90 requests so there was concern about whether the CRL cost was justified. UCD patrons could be accessing material via CRL electronically still, even though the amount of ILL requests may have diminished.

HOPS representative can get the number of electronic accesses to CRL from their IP address

No other UCs reported any concern from their supervisors or superiors.

5. Report from ALA midwinter - Jenny Lee

Jenny Lee gave an update on a variety of information from the ALA Midwinter conference:

A new ISO protocol was discussed and if its passed (approved?) a group will write up the new standard

Jenny reported on the New Ex Libris ILL set up: Northern WA and Idaho are combining their catalogs...***I'm honestly a little foggy on this bit Jenny...so maybe you can fill in the blanks...*** What I have is something along the lines of there is a new software called ILL Primo that works with a catalog AMA. There was a lot of interest in this set up but there are lots of unknowns and still a lot to be worked on...only the basics are set up and it was kind of like VDX 5 years ago. Not ready... Catalogers are concerned about individual notes being worked into the unified catalog...

OCLC Update: We need to be Off of WCRS by November. OCLC looking into credits to be giving for catalog records. In May, the lending string in OCLC is going up to 15, but we won't be able to use that until we go live which should happen in August. There will be new features for ILLIAD users but she didn't learn about those as they do not apply to her .

Jason mentioned that he is not impressed by the ILLIAD ILL stuff, but interested in how it develops.

Jenny met with Relais Internations. Learned about the Relais ILL product and a smaller version which is similar to Worldcat local. She also looked at the scanning-only product . Mostly Canadian libraries are using Relais for ILL and most users are employing the Worldcat Local style of Relais with Illiad. A few smaller locations in the US are also using this.

Further info on ILLIAD: Jenny is going to have a webinar about the ILLIAD ILL product. Jason thought the program was more rigid than VDX but could be further developed. Jenny is interested to see how it works in a consortium setting. Interested to see how it develops at this point.

Charlotte attended a Content Analysis Collections Analysis presentation which was done by Rick Lark (who worked with YBP) He went over developing sustainable collections services and is working with OCLC. Interested in arriving at strategies to decide what goes into storage, what gets digitized... Might be worth looking into for the UC system. Charlotte will see if this presentation was recorded and will send out the URL to his web site. Charlotte mentioned that this was the most interesting part of ALA for her.

6. Survey Analysis -- Jenny Lee

The group is still working on the results and issuing a report. Will hopefully have something out by next month (March)

7. DTD/article delivery procedures and ideas -- Jason Newborn

Jason issued an apology for his initial comments over e-mail about this discussion.

Jason wanted to Remind Everyone to do the extra step of sending a public message in VDX so units will know that a DTD was in fact sent to their end user and so that they can properly Receive the request in VDX. A new concept is being shaped that will possibly take care of this extra step of sending a public message but it is not being rolled out yet. It is important at this point that staff and students at all branches understand this messaging step must be performed (in the case of sending DTDs)

Andy brought up the idea of CC-ing the borrowing ILL unit with the DTD e-mail so that the borrowing unit would know the DTD was sent and could properly receive the request. Jason acknowledged that this could work, but it would need to be clear to the borrowing units that this had indeed also been sent to the patron so that they would not go ahead and forward the article onto their patrons thereby duplicating work.

Question of whether OCLC Article Exchange can send to multiple e-mails...Apparently this works too and Judea likes this idea, but the requests don't always have the borrowing units e-mail addresses included.

Scott noted he has found that in the process of supplying DTDs, its easiest to save all the picklists of the items that have been scanned and sent to the patrons and then do a bulk public messaging in VDX for the borrowing units with the DTD sent notification. Jason responded that

this may be another case of everyone having different procedures. Jenny Lee and UCSB update the Requests in VDX to Shipped before doing the scanning, instead of waiting and sending a message each time

Scott brought up the possibility having VDX actually send the public message that can be entered during the Shipped action...thereby both updating a request to Shipped in VDX and sending a public message in the same action.

Jason wants to keep asking to see if there is another way we could eliminate this currently necessary step of sending a separate public message for DTDs. Could we possibly run a report to catch all these DTD sent requests so that they can be properly updated to Received?

Andy will send out an e-mail to the list to demonstrate his technique of cc-ing the borrowing ILL unit with the actual DTD e-mail being sent to the end user patron. We can then discuss this technique further.

8. Southern and Northern ILL meetings -- Jenny Lee

Jenny Lee raised the question as to whether or not we were going to have in-person Southern and Northern UC ILL meetings this year. She is going to do a write-up and send out a proposal. It was established that the proposal for these meetings needs to go through RSC. Charlotte noted the re-org that is happening soon. Jason will forward this to Sarah for the RSC call. It may have to go out to each campus as well to see if it travel to these meetings would be approved. Jason noted that he has been getting some push-back about travel and may not find support locally. It was decided that we will send out a proposal and see what response we get.

There had been some previous discussion of holding the northern UC ILL meeting at UCSF...Aleta had previously volunteered...and there was talk of including NRLF and CDL as well as Stanford to this meeting. Jenny will add both RLFs into the proposal for RSC as well as Stanford..

UCSD can host the southern meeting. For the northern meeting there was some discussion as to where would be the easiest location to get to...UCB or UCSF?

Charlotte mentioned that we had been on a rotating schedule but that this had dropped off since the Northern meeting had not taken place in a little while. Then the Southern meeting took place and was broadcast over the web so the Northern UCs could also participate...thereby having a single UC ILL meeting...which took care of some of the travel issues as well.

The Southern meeting had some very nice presentations in the past and we acknowledge the value of getting people together face to face, but selling this concept could be difficult at this point. Jason will put the proposal forth to SOPAG. We will keep the proposal for both a Northern and Southern meetings.

Additional Items of Business

*Stanford is looking for a new overhead scanner. Rose wanted to find out about the various scanners that we have been using and get feedback on them.

-UCD and UCSD have been using the Bookeye Scanner.

- UCD is using B-scan ILL with Ariel (and is possibly going to get Odyssey working as well) Using B-scan costs extra but is native to the scanner.

-With B-scan you have to scan the picklist slip when filling a request. The scanner picks up the ILL# but the e-mail addresses are too varied. B-scan allows for a lot of image processing and corrects for page curvature as well as skewing. It also maintains a queue of sent requests.

-UCSD is using Freeflow which is the software that comes with the Bookeye Scanner. A new software product is being developed that will work with OCLC Article Exchange

-Charlotte asked if the OCR (optical character recognition) is ADA compliant. Jason responded that the Bookeye will only do OCR on the picklist slip to facilitate delivery but not on the content of the article scanned.

-UCSD Special Collections uses the Kiosk version of the Bookeye which is ADA compliant

-UCB uses a flatbed scanner at the various library branches for public use and they also use one in the ILL office which works pretty well.

-SRLF uses the Copibook scanner and has found it to be much faster. It has improved efficiency to the degree that they can scan 3 articles/chapters with the Copibook in the time that they could scan 1 article with the Minolta. There was some discussion on about the software and IT support. The lighting can be a little problematic on the Copibook, there was some greying on the edges of the scanned images and the image can be a little muddy when using the greyscale setting...the hard drive in the scanner also crashed at one point (**John, correct me if I captured this incorrectly....)

-There was some discussion on the difficulty of getting replacement bulbs for the Minolta scanners at this point. Sometimes the filaments break as they are shipped over from Japan. It was also noted that the new Minolta scanners are a bit slow. Jason noted that their Minolta scanner never actually died outright, but the scan quality just got progressively worse as time went on.

Next IAG call is set for April 25th at 2pm.