

## RESOURCE SHARING COMMITTEE (RSC)

Minutes, Kaiser Center, Oakland

March 4, 2002

Attendees: Scott Miller (NRLF), Claire Bellanti (SRLF), Gail Nichols (UCD & recorder), Pam LaZarr (UCI), Elaine Adams (UCLA), David Rios (UCR), Marlayna Gates (UCSB), Deborah Turner (UCSC), Tammy Dearie (UCSD & chair), Jackie Wilson (UCSF), Gary Lawrence (UCOP)

Not Attending: UCB, UCM, Lucia Snowhill (LAUC)

### 1. Announcements

David Rios from UCR was introduced. He has recently assumed the AUL Public Services role in addition to his AUL Sciences role.

New RSC liaisons to the Circulation Advisory Group and the Interlibrary Loan Group need to be appointed.

### 2. Updates

VDX

UCSD had training in the third week of February. UCLA is to receive training March 2. UCLA and UCSD are expected to be live in April. It has been something of a rocky road with training; there were both hardware and software problems. Once the VDX software is loaded on its new hardware, the speed should improve. When UCLA and UCSD go live, their connection to OCLC will be through VDX; only pre-existing OCLC requests can be completed using the direct link to OCLC.

Docline is working on interoperability testing; Docline still has work to do, and the extension of VDX to Docline is expected this summer.

Desktop Delivery through VDX will be delivered in the summer. Negotiations between VDX and RLG continue.

The Request Team is working on configurations for campuses now and is currently matching ILL locations with library material locations for each campus.

The entire list of OCLC location codes are to be added; the top 100 will have addresses loaded. Docline will provide a list of their codes. Requests received by fax and email can be added to VDX.

VDX has not yet Americanized the clients, although they have Americanized the web. UCSD is working on Americanizing the clients. "Idle" will be translated into a term our users will understand.

There will be two big trainings, one at the end of April at UCI and the other the first week of May at UCSF. These will include the remaining libraries except UCD and UCSB, although UCSB may decide to join the April training. VDX can take 12 attendees per session. These are train the trainers' sessions.

VDX clients (on disks and instructions on how to load) have been or will be sent to each campus prior to training. Distribution may have been delayed because of CDL hardware installation issues.

The implementation timeline will need some adjustment because of the late start. The OCLC timing has yet to be set; this is done on OCLC's timetable, not ours.

The local web page for requests is developed, but will need to be configured for each campus.

**BILLING:** Leigh Haynes (UCB) will be developing the billing module using Crystal Reports. A copy of Crystal Reports (web client version) has been purchased for each campus; it is accessible to multiple users. The billing is expected to be ready when UCLA and UCSD go live.

VDX can do broadcast searching after all UC and OCLC searches have drawn a zero.

The next VDX release will allow a local catalog search of a request that comes in through the web request form before the request is forwarded to the ILL staff. VDX has some capability to tell the patron the local campus has an item.

### Desktop Delivery

Two RLF's and three campuses are ready to use DTD. CDL thinks this is the critical mass that SOPAG wanted in order for the project to begin.

Email delivery will use the email address input by the patron at the time the request is submitted, but will notify the patron that the existing email address in the borrower's home system is different. The article will go to a server at the CDL and an email "postcard" will be sent to the patron with instructions on where to pick up the article.

This service will go into place as soon as it is tested. This will not be before April 1, but will not be later than May.

DTD is completely separate from VDX at this time. UCSD is using ERES. UCLA is using Relais Express. Other campuses are using a combination of Ariel and Minolta with workarounds that do not interconnect with their local systems; these campuses will need to continue the manual workaround for local updating and will need to update the local system from the cc of the patron's email that is sent to the local ILL unit.

### Tricor

Tammy received the final MOU from Bruce last week. UCSC had added second pick up location at the Science Library. All incoming requests will continue to be sent to the Main Library. UCB pick-up time has not changed in the MOU although Tricor is arriving before the scheduled time consistently. This MOU went into effect last fall. Tammy will send copies to each campus.

### CDL Request

Unlike the current CDL Request process, the "Need by Date" actually does something in VDX; the request is cancelled when that date is reached. The Request Team has suggested that we reverse the list of choices to put the longest time first; it is thought that most users select the first time available, so we should have fewer unanticipated cancellations. The default will be six months, and VDX will end the request at that time; the patron will get a notice that his/her request had X ending date and that date is now here; the patron will be asked what he/she wants to happen. A return message can be sent to the ILL unit to reinstate the request. It was suggested that we take another look at the text surrounding the "need by" date and see if some additional text could explain the choice better and that the CDL monitor comments on this topic.

Claire will (1) propose the "need by" date choices be reversed, (2) the message on the Request screen be reviewed, (3) ask Jane Dickson to return patron comments to her, (4) ask IAG to save comments from patrons.

It is too early to ask about how CDL Request will work with Melvyl-T. It is planned to be in place this fall or at least well in advance of the cut-over date.

#### Special Collections Project

The revised survey form is to be used for CDL Requests received between 4/29 and 5/10. This form is to be used IN PLACE of the earlier form for this time period.

Each campus is to check local profiles so be sure all Special Collection requests are being sent to the review file prior to being sent out. The home campus really needs to review these requests.

Each campus is requested to send in any locally held survey forms that have not yet been sent in.

RSC considered a few revisions and decided to stick with the suggested dates. Details will be sent to the IAG by Claire.

### 3. Discussions

#### Workshop Proposal from RSC-CAG

Questions were raised about the affiliations of the speakers; it seems that consortia leaders are needed. There is an ALA preconference on consolidating service points; perhaps we could identify some speakers from the preconference. RSC felt that Ereserves should not be included in this workshop, but perhaps become a separate workshop and include campus course management systems as well. Based on our experience with the copyright workshop, June 2002 is probably too soon to be able to schedule this workshop. The beginning of NCIP implementation is still a year away. It was decided that more work is needed on this proposal. Claire will take the following suggestions back to CAG:

Pull out the Ereserves segment and do a separate workshop.

List the audience in terms of functional responsibilities

The audience size is too small; the copyright workshop was targeted to 100-125

The last objective was questioned: it could be billing; it could be ereserves.

#### Block proposal from RSC-CAG

After discussion the following recommendations were made that Claire will take back to CAG:

Change the proposal so that the campus library administration, not SOPAG names the contact.

Add information on the frequency of the need for blocking; how often has such a need occurred?

Add that other campus billing contacts should be notified, as appropriate.

Inform SOPAG, for policy.

Remove the final check; there are too few incidences and this raises privacy and legal issues.

Ask the CAG to develop a rationale and needs statement for this policy. The rationale and needs statement should be part of the introduction to the policy and should include information on the frequency that situations requiring blocking occur (i.e., how many times per year per campus).

#### SOPAG and the Role of All-campus Groups

Tammy will articulate our discussion in a draft response to SOPAG and will share with RSC members, IAG and CAG. We will ask IAG and CAG to use a similar process when dealing with RSC.

Communication: reporting mechanism varies from campus to campus.

Timely Response: Groups need time to comment, and requests for comment need to be directed to appropriate all-campus groups.

Agenda Setting: another committee seems excessive; RSC has an effective way of accomplishing this. We may want to include subgroup chairs in agenda/meeting planning.

Meetings: already meet SOPAG recommendations

Charge, Goals & Objectives: We do this; we may need to review the charge and the charges to our subgroups.

Initiative: already do this.

## Review Goals and Objectives

Our goals and objectives document of 2001/2002 was reviewed.

Objective 1: Implement the Consortial Borrowing Software product

Work is ongoing.

Objective 2: Implement the Request feature in the new Melvyl catalog and CDL databases.

Work is ongoing.

Objective 3: Implement Desktop Delivery at all campuses.

Work is ongoing.

Objective 4: Review ILL Loan Periods

Review was completed with decision to continue current practice for the time being. RSC will take another look after VDX and Melvyl-T implementation.

Objective 5: Co-sponsor a Workshop on Copyright in the Digital Age

Completed.

Objective 6: CAG Best Practices Workshop

Planning is underway.

Objective 7: Investigate methods for improving access to materials in storage facilities

P. Iannuzzi has some ideas to consider; a task force needs to be formed and charged.

## Objective 8: Pilot Project to Unblock Request for Special Collections Materials

Project underway.

## Objective 9: Blocking UC Individuals at the Home Campus

Proposals being reviewed and revised.

## Objective 10: Review External user Policies

CAG is close to a final draft report.

## Objective 11: Develop More Efficient Methods of Reporting UC ILL Statistics

Request team will provide recommendations to RSC on how to use VDX to collect statistics. Statistics for non-VDX participants need to be reviewed.

## New goals:

More work on copyright with a specialized focus.

## UC Standing Committee on Copyright

Gary Lawrence reported on the work of this committee. Its focus has been on ownership of course materials. The committee will have a conference call on ownership the week of March 11. The committee will reaffirm and extend the current policies as defined in the University's 1992 policy on copyright ownership. The committee has also looked at copyright issues surrounding the recording of courses and the reservation of rights in faculty publications. Copyright education and information for campus communities is another interest. There will be a joint meeting of SLASIAC and the Copyright Committee in May.

## ILL Transactions Report



Gary Lawrence distributed the most recent compilation of UC ILL statistics; these will be published on the web in about a week. With the inclusion of the RLF's as lending units for the first time this year, it is evident that better definitions and procedures are needed to reconcile difference in RLF and campus reports of items borrowed from the RLFs; inclusion of data from the national labs, Hastings, and other non-participants in VDX needs to be examined. Committee members again suggested that the report look at lending only, since the lending and borrowing data differ significantly and lending data is more accurate. It is expected that persistent differences in data reported by lenders and borrowers within UC will be reconciled with these data begin to be produced by VDX. Gary reported that there currently is no UCOP committee to consult with on management reporting and statistics. Claire and Tammy will discuss with Gary how systemwide ILL statistics will be counted in VDX.

#### Proposals for the Use of Resource Sharing Funds

Several suggestions were made. Send other ideas to Tammy.

Ongoing Minolta service

NCIP implementation funding (mid-2003)

RLF accessibility

Improved access to materials in campus storage facilities

Pilot digitization projects, perhaps including scanning and retaining images for Special Collections requests (similar to the Stanford project) We could get input from Stanford and the OAC.

Funding to implement storage strategies resulting from CMI.

DTD funding for equipment replacement; create a reserve fund for replacement

#### 4. Next Meeting

The September conference call will need to be rescheduled. Tammy will solicit alternate dates.

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