RESOURCE SHARING COMMITTEE (RSC)

Minutes of Conference Call, September 24, 2001

Present: UCSD, Tammy Dearie (Chair); UCB, Patricia Iannuzzi; UCD, Gail Nichols; UCI, Pamela La Zarr; UCLA, Elaine Adams; UCR, Venita Jorgensen; UCSF, Jacqueline Wilson; UCSB, Marlayna Gates; UCSC, Deborah Turner; NRLF, Scott Miller; SRLF, Claire Bellanti (minutes); CDL, Mary Heath; LAUC, Lucia MacClean; UCOP Representative,Gary S. Lawrence

1. STATUS OF CONSORTIAL BORROWING SOFTWARE

Tammy Dearie reported that CDL has reached an agreement in principle with the preferred vendor. The Request Team expects the contract to be signed on October 1 by UCLA Purchasing.

The Request Team is developing an implementation plan. An initial plan and calendar was discussed at the SOPAG meeting of September 21. The Team proposes that two pilot campuses, UCSD and UCLA, receive training, develop policies and test the system. Campuses "sign up" for one of two additional other implementation phases. Phase 1 will begin as soon as the contract signing is complete, Phase 2 is likely to begin in January, and Phase 3 in March.

Other points:

RLF's will be participating with their lead campuses.

Some desktop windows clients will need to be installed on local workstations to use the system, although web access will also be available (systems staff need to be alerted).

The Team has asked for more assistance, and will be adding two more members. (To be approved by SOPAG and UL's.)

2. MULTIPLE ITEM REQUESTS AND A&I INDEXES

Mary Heath posed a policy question to RSC about multiple requests from the new A&I databases. Many of the database vendors are unable to support ordering multiple items in REQUEST. Most vendors support open URL's so they can be linked to SFX however, request can only be done one title at a time this way. (Pub Med is one of the few vendors that can manage batch requests.) This basically means that a patron would need to submit their library barcode for each article ordered. In some cases, but not all, CDL may be able to overlay a profile capability onto a database. That will require programming.

Heath asked: Is it important to maintain the ability to request multiple items in databases RSC members answered with a resounding yes, it is essential.

Heath asked: Is it more important to have a consistent interface or more important to have the multiple item request functionality where it can be made to work RSC members agreed that functionality wherever it can be obtained is more important than consistency, but the goal should be to work toward making the interface more consistent.

Heath asked: In general, what is the priority of maintaining the multiple request functionality RSC answered that the priority is high. Patrons and staff alike will see the inability to make multiple requests as a step backwards.

3. TRICOR PROBLEM REPORTS

Gail Nichols analyzed Tricor problem reports and notes that most problems with shipments are created by library staff, not by Tricor staff. Dearie reported this analysis to SOPAG, suggesting that campuses stop maintaining the problem reports. SOPAG agreed.

ACTION: Campuses may stop sending Tricor problem reports to Nichols.

Point of Information: Cate Hutton (CDL Director of Business Development) administers the contract now.

4. DESKTOP DELIVERY STATUS

Claire Bellanti reported that SOPAG met recently and endorsed the idea that "desktop delivery" be the default mode of article delivery for REQUEST. Each campus may bring up desktop delivery as it obtains enabling software, or it may wait until the CBS provides full desktop delivery capabilities.

RSC listed a group of policy/procedural issues that must be addressed before implementation begins:

E-mail address is pulled from patron records, if there; what to do if the email bounces?

What if the patron does not want to receive articles in desktop delivery format?

Should there be a consistent time period among campuses for postings to remain on the web?

Does the lending unit notify the borrowing unit when the article is posted?

If an ILL unit scans a document out of copyright, do we want to attach it to a bibliographic record?

Is there a different scan standard if we are saving scans for preservation?

Should color scanning be made available upon request How would people request it if there is no choice on the CDL Request page?

ACTION: RSC refers these questions to RSC-IAG for recommendations.

5. DESKTOP DELIVERY ROUND ROBIN

Bellanti asked for status reports from each campus in order to provide a report to the UL's on Desktop Delivery.

UCB — has scanner, having problems with Minolta installation and training, waiting for ARIEL 3.1

UCD — has two scanners, not yet out of the box but installation planned for this week; Relais Express has been recommended but not yet purchased

UCI — scanners not installed, but Minolta rep ready to do the training; ARIEL software not received; may investigate Relais Express

UCLA — three scanners arrived for YRL and Sciences, Bio (Bio already had one, this will be second, Law already has one); installation due shortly; Relais Express purchased and ready to install as soon as scanners up

UCR — one scanner arrived missing a part (already one other one in another Department), part due this week; awaiting ARIEL

UCSD — swapped out and down PS 3000's for two PS 7000's, also have three color scanners; existing campus projects continuing; ARIEL 3.0 received but installation was buggy so waiting for patch, i.e. ARIEL 3.1

UCSF — scanner scheduled for delivery this week; ARIEL 3.0 installation a disaster, awaiting ARIEL 3.1

UCSB — scanner received, expect Minolta installation tomorrow; awaiting ARIEL

UCSC — scanner received, alarming problems with Minolta installation; existing campus pilot project going well; awaiting ARIEL

NRLF — for the past year has been doing DTD pilot with UCB Chemistry Library clients using a PS 3000 scanner. Having problems with local Minolta support. PS7000 scanner received but not installed; awaiting ARIEL. Scott Miller reports that RLG has recalled ARIEL 3.0 and is due to re-release the software as ARIEL 3.01

SRLF — scanner in last year, added gray scale; Relais Express running and DTD going to other UC libraries and outside clients

N.B.: RLG web page indicates that new ARIEL release is due October 1.

ACTION: Several campuses (especially northern campuses) complained about service and training with Minolta. Campuses will email Bellanti with complaints and she will relay to the Minolta National representative.

6. EXTENDED ILL LOAN PERIOD

Marlayna Gates proposed an extended loan period for ILL. UCSB analyzed its renewal data and demonstrated that workload would be greatly reduced if UC ILL units provided an extended due date. Each campus could check out items to users for their regular loan period, but would not need to request a renewal from the lending campus in order to renew to the patron.

Dearie noted that IAG discussed this question at their last meeting and could not reach agreement on the proposal, kicking it back to RSC. Discussion ensued. There is not agreement among RSC members on this issue either. Nichols particularly noted that there is great resistance to lengthening loan periods because recalled items are not being returned. Patricia Iannuzzi suggested that each campus might want to keep renewal statistics as USSB did in order to gather some date. Some campuses noted they do not have access to such detailed statistics.

ACTION: Refer the question back to IAG; ask them to give us an objective summary of the advantages and disadvantages of a longer loan period.

7. CAG PROPOSAL ON BLOCKING PATRONS BETWEEN CAMPUSES

RSC reviewed the Circulation Advisory Group's proposal on UC faculty, staff and students at home campuses when they run up bills and fines at other campuses under the UC reciprocal borrowing arrangements. While REQUEST blocks users if they are blocked on their home campus, there are

instances where borrowers have large bills from campuses other than their own. Campuses would like the "home" campus to actively pursue such problem patrons. Pamela La Zarr noted that not all campuses have similar policies on blocking, for example UCI does not block faculty at all.

N.B.: Campus blocking policies can be found on the CAG web page at http://library.ucsc.edu/uc-circ/

Direct page reference is http://library.ucsc.edu:8080/Zope//uc-wide/uc-circ/policies/blocking_privileges

ACTION: Bellanti and Dearie will work on rewording the first and second bullets of the proposals. Then Dearie will forward the proposal to SOPAG with the caveat that campus blocking policies differ.

8. GOALS AND OBJECTIVES OF RSC FOR SOPAG

Dearie listed goals and objectives for RSC and asked for confirmation that these matched our accomplishments and plans for the future. The goals were:

Consortial Borrowing Software

Request feature in the new Melvyl catalog and CDL databases

Implement Desktop Delivery at all campuses

Review ILL Loan Periods

Co-sponsor a Workshop on Copyright in the Digital Age

CAG Best Practices Workshop

Identify and analyze barriers to the expeditious sharing of materials

Pilot Project to Unblock REQUEST for Special Collections materials

Blocking UC Individuals at the Home Campus

Review External User policies

Coordinate collection, organization and systemwide reporting of UC ILL/Resource Sharing statistics.

Iannuzzi added a goal: "improving access to materials in storage facilities." She indicated specific tasks that might be pursued to meet this goal: digitize table of contents of journals, analyzing sets in storage, and enriching cataloging records. Gary Lawrence noted that the Collection Management Group would welcome ideas about this issue from RSC.

ACTION: Dearie will report the goals and objectives to SOPAG.

9. SPECIAL COLLECTIONS REQUEST EVALUATION

The CDL Request Team proposed that RSC-IAG carry out a staff evaluation of the special collections request. Such an evaluation would use both statistical information generated by OCLC from review files, and specific title information to be maintained by ILL units. The purpose of this evaluation would be to help us understand how users are working with these requests, whether there are cataloging issues we need to work on, and the collection management issues surrounding special collections items. Specifically, HOSC want figures to show them the volume of activity for special collections items, and SOPAG want to know the volume of requests being filled and denied.

RSC suggested some changes to the draft evaluation process.

ACTION: Dearie and Bellanti redraft proposal and send to IAG.

10. RLF REPORTING OF ILL'S

The new ILL reporting forms on the web now reflect space for RLF loans, but there are no specific instructions to fill out those forms. Gary Lawrence mentioned that as this is a transition year for the statistics, we should be reporting the information that we actually have. Next year's data should be better.

ACTION: Lawrence will share preliminary data with us and highlight the statistical issues.

11. TRICOR CONTRACT

The TRICOR contract expired in July. Cate Hutton and Bruce Roberts are negotiating now over prices for the next contract. Dearie asked for feedback on what changes should be made to the contract:

UCB wants their delivery times changed

Add a clause that provides a penalty to TRICOR if they miss delivery times

UCSC is geographically challenged, but wants same turn around time as other campuses

UCLA Research Library is having trouble with weights, Adams will send details to Dearie

UCI is having invoicing problems with "overage" charges

The meeting ended with the agreement that the next meeting would be a telephone meeting and the spring meeting would be in person.

ACTION: Dearie will email the group with potential days and times for future meetings.

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