The 2014 LA ISO ILL Partners meeting was held in the National Library of Australia on 30 October prior to the Libraries Australia Forum. The meeting was attended by 30 people from 21 libraries/organisations including four colleagues who dialled in from the State Library of Western Australia.

This year’s meeting was different from previous years. The agenda was generated based on the feedback and ideas provided by the ISO ILL partners in their responses to two surveys conducted – one after the last year’s meeting and one prior to this year’s meeting. An informal round-table format was adopted for encouraging information exchange between ISO ILL partners, system vendors and hosting service providers. The meeting was chaired by Monika Szunejko, Director of Database Services at the National Library.

Inside

- The Future of LADD
- Vendor panel sessions:
  1. System interoperability
  2. New ISO ILL standard
- “Post-it notes” sessions
- Future ISO ILL Partner Meetings
In opening this session, Monika Szunejko affirmed the commitment of the National Library to delivering and supporting a national resource sharing service. The importance of the accuracy and currency of data held in the Australian National Bibliographic Database (ANBD) to support national resource sharing were highlighted. The continued downward trend relating to the use of the LADD service was noted alongside a range of improvements made to the LADD service throughout the year. The range of improvement to the LADD service were highlighted including the system upgrade to VDX6, the implementation of the location update scripts, the improvements made to the LADD training system, and the LADD team’s initiative to start an information series titled ‘Topics of interest’ aiming at empowering the members with useful self-help information.

The National Library’s commitment to supporting a national resource sharing service for as long as the Australian library community requires and uses it was reiterated.

In addition, Libraries Australia services outlined what the service understood at the time to be a timeline for the future of VDX. OCLC representatives provided the meeting with further information about the future of VDX:

“In 2014 OCLC completed its transition of WorldCat Resource Sharing Libraries to its new service WorldShare ILL service (WSILL). In an 18 month period all 6,500 libraries worldwide were successfully moved to WSILL.

OCLC currently plans to start moving libraries from VDX to WSILL in FY17. At this stage, there is no end of life date scheduled for VDX and OCLC will continue to support and provide bug fixes for VDX.

OCLC will communicate any changes to these plans to all VDX libraries as soon as the information becomes available.”

VENDOR PANEL SESSIONS

Two topics were posed to the panel of library vendors of ISO ILL systems and hosting service providers CAVAL and UNILINC currently used in Australia: Interoperability between ISO ILL systems, and the New ISO ILL Standard. Unfortunately Moshe Shechter (Product Manager of Alma ILL at Ex Libris, based in Jerusalem) missed out on participating in the session due to a technical telephony issue.

1. ISO Interoperability between different ISO ILL systems
The vendor panel participants talked about how each system works with other systems, particularly on delivering electronic document to/from DocStore and related issues, how each system handles location updates, and how each system exchanges requests with LADD gateway and whether or not the requests can be re-submitted. The panel answered questions from the participants.

2. New ISO ILL standard
Patricia Burke, Operations Manager from OCLC, and Mark Finlay, the Application Specialist from Relais International, jointly briefed the participants on the latest development on the new standard. Patricia Burke mentioned OCLC will implement the new standard in the WorldShare ILL in 2016/2017 financial year but will not implement it in VDX. The system will not be backward compatible with the existing standard. Mark Finlay informed the participants that Relais International is committed to being one of the earliest implementers. Some comments were made by the participants on the new standard and its benefit for interlibrary lending and document delivery.
Alma - Moshe Shechter, Alma Product Manager, Ex Libris

Alma works in two basic models:

- **Broker** – In this model, an external resource sharing system runs the resource sharing process, and updates Alma which manages the fulfilment and inventory aspects of the process. Alma integrates with systems operating in this model using protocols including OpenURLs, Z39.50 searches and NCIP, of which Alma supports both versions 2.0 and 1.0 of the protocol.

  Alma currently works in this fashion with Relais, OCLC Navigator, ILLiad (NCIP aspect in advanced testing phase) and INNReach.

- **Peer to Peer model.** In this model, Alma manages all aspects of the resource sharing process, including the communications with the remote peer system. The integration options in Alma today include BL ARTEMails as well as ISO ILL messages. Additional integration options are being developed.

Aleph - Helen Loosli, Library Applications Support, UNILINC

- **UNILINC**
  - A library consortia of 20 academic libraries varying its size from a few thousand to a many hundreds of thousands of collection items
  - Cooperative network; central bibliographic database administered by UNILINC
  - LMS: ExLibris Aleph v20.2
  - ILL Client functionality implemented in 2009
  - 6 institutions, 14 ILL partners
  - Inter consortia requests are sent between UNILINC libraries within Aleph ILL. If a UNILINC library is unable to fill a request then the request is sent out for filling via the LADD gateway.

- **Aleph ILL**
  - ISO ILL compliant
    - Aleph uses the TCP IP protocol opposed to the email protocol used by VDX and Relais. This means Aleph connects to the LADD Gateway differently to all other satellite systems and quite often detects ISO ILL related down time ahead of many other sites.
  - A total and seamless ILL management system starting from user initiated requests via Primo/SFX through the entire ILL cycle to the closing of request when cycle is completed
  - Can be setup as unmediated but the customers prefer to use mediated requesting
1. SYSTEM INTEROPERABILITY CONT.

- **VDX DocStore and Aleph**
  - Aleph does not use or connect with the DocStore
  - Aleph is able to ship a request as an electronic delivery and associate an URL for the borrowing library to collect their request but this has not been implemented by choice
  - Libraries supply requests with email attachments; dropbox and other similar institution approved cloud based services
  - Libraries never request DocStore so requests are not supplied that way.

- **VDX Location Updates**
  Location update works differently with Aleph:
  - Aleph has no automatic process to update locations as VDX does
  - Suspensions are manually placed in Aleph
  - Many suspensions are in the future, which have to be placed in the future through manual systems

- **Exchanging requests between systems (VDX and Relais)**
  - Generally there is a seamless interchange of borrowing and lending requests between LADD, satellite VDX and Relais libraries as well as Te Puna Interloan
  - Aleph ILL Numbers have : 9 digits and 4-5 leading zeros e.g. 000034891
  - In most scenarios once an action is marked in Aleph it cannot be rolled back
  - If a request action is performed in Aleph and the LADD gateway is down, staff cannot re-action the request
  - Missing actions can be logged manually within the Aleph request log for future staff reference and handling of the rest of the request cycle.
  - If requests come to Aleph without the expected action applied by the other library involved, staff can in many situations “change status” of the request manually e.g. Borrowing Request: if Item arrives at the library and no shipped action in Aleph, staff manually change the request status to ‘Lent to library’ so that the ‘Received’ Status is marked and for Lending Requests the associated workflows for lending are put in place and for Copy Requests the request is also marked as closed.
  - Libraries are encouraged to use messaging between each other if there are problems

- **Resubmitting requests**
  - In some scenarios requests can be re-submitted e.g. add new libraries to a rota if no libraries have been able to supply previously.
  - Occasionally the Aleph libraries have to ask for a resubmit from borrowing libraries or re-do their own borrowing – not often

- **Future**
  - UNILINC is implementing ExLibris Alma – June 2015 and will go live with Alma ISO ILL
  - Following the wash up of Aleph requests post Alma implementation, there will then be no Aleph ILL sites in Australia
Relais - Sae Ra Germaine, Digital Systems Specialist, CAVAL

- **VDX Docstore - how does it work with other ISO ILL systems? what are the issues if any?**
  Relais delivers documents to Docstore but does not receive documents via docstore as it has equivalent delivery options. In previous versions of Relais ILL there are some issues with delivering to Docstore addresses. It is critical for Relais to know the docstore address prior to delivering the document as this has to be configured within the system. If docstore addresses change, Relais libraries and CAVAL need to know ASAP as these addresses need to be added to the system immediately.

- **Location update - how is it handled in different systems? what are the issues if any?**
  There are currently two methods that are used by Relais customers for the Location Updates. On behalf of the “Managed Service” customers (11 Customers) CAVAL read the location update manually and “push” the configurations to the customers. However for the “Non-managed Service” customers (7 customers) this is handled manually by each individual customer.

- **Exchanging requests between different systems** – when a request is not received by the gateway, what will happen to your system? Can the request be re-submitted? Does the library have to create a new request?

  Scenario 1: When a request is not received by the gateway the follow steps are followed:
  ⇒ Check if the library configurations have been setup correctly (including ISO Address, NUC Symbol and messaging method)
  If the settings are correct and the request may have gone missing, resubmit the request to the system. The option to create a new request is also available.

  Scenario 2: When a request has been received by the gateway however the ISO ILL Library has not received the request
  ⇒ Check with the gateway to see what the last message was in regards to the request.
  ⇒ There is no easy method in Relais to resend shipped/received/returned messages.
  ⇒ It would be suggested to try and resubmit the request to see if the request comes through. If not, “Cancel” the request and submit a new request.

  Scenario 3: Shipped/Received/Returned message was not received:
  ⇒ Relais is unable to resend shipped/received/returned/checked-in messages.
  ⇒ Check with the gateway to see what the last message was in regards to the request.
  ⇒ If the last message was shipped or received the payment still occurs
  ⇒ If neither has been received it is suggested to “Cancel” the request and submit a new request to ensure that payment goes through.

- **In General:**
  ⇒ The Relais system utilizes a Windows based application known as the ILL Message Handler to parse incoming and to send outgoing ISO ILL messages.
  ⇒ The sending and receipt of messages is supported for both SMTP and TCP/IP communications.
  ⇒ support for the full complement of ISO messages (save perhaps the sending of Will Supply - TBD)
  ⇒ Over the past several years Relais has completed compliance testing with the following systems so many of our clients are communicating with these systems:
    - Relais -> Relais
    - OCLC
    - VDX
    - LADD
    - Agent
    - NLM (until they pulled the plug on ISO ILL communications)
    - RapidILL
1. SYSTEM INTEROPERABILITY CONT.

VDX - by Bryce Albiston, Senior Support Consultant, OCLC

- **VDX DocStore**
  - How does it work? See the slides for detailed information

- **Location update**
  - The Location Update Script has been developed by OCLC for VDX systems.
  - How does it work? See the slides for detailed information

- **Exchanging requests between different systems**
  - Requests that do not get to gateway can be resent
  - Requests that get to gateway but not moved on
    - Cannot be resent from gateway or original system
    - Create new request in VDX

2. NEW ISO ILL STANDARD

Alma - Moshe Shechter, Alma Product Manager, Ex Libris

Ex Libris is monitoring the market adoption of the new ISO standard, and will develop capabilities in this area as part of Alma’s resource sharing roadmap.

Relais - Sae Ra Germaine, Digital Systems Specialist, CAVAL

- The system vendor Relais International plan for the implementation of the new standard - i.e., the support and development path for the change
  - Relais is intended to start development of a new version of RelaisILL to use the new standard but this is on the assumption that RelaisILL will be able to communicate with other systems as the new ISO standard is not backwards compatible.
  - Full support will be provided.

VDX - Patricia Burke, Operations Manager, OCLC

- New ILL Standard / Protocol
- OCLC will implement the new standard for WorldShare ILL but not for VDX
“POST-IT NOTES” SESSIONS

In the two ‘Post-it notes’ sessions the participants shared their ISO ILL practices in a few words that they prepared on a post-it note. The discussion covered two specific aspects: interoperability with suppliers and supplying networks, and using NCIP between ILMS and ISO ILL system.

Below are a few ‘notes’ from several participants, some of whom spoke at the meeting but some sent their notes over after the meeting for sharing with their colleagues.

Guy Wilson – RMIT University (VDX)

Interoperability with suppliers and supplying networks

- Our VDX system interacts directly with British Library and Infotrieve
- Major non-LADD suppliers are Subito and the National Library of Medicine in the USA neither of whom interoperate with our VDX system.
- Have dummy non-VDX locations configured on the rota for major non-LADD suppliers and WorldShare requests.

Margaret Colmer – University of Adelaide (Relais)

NCIP - RELAIS + ALMA = FAB

- Started implementing around March/April, went live July.
- Basic functionality works very well. Very streamlined. Request side - physical items are checked out to the user and all notifications re loan come from Alma. Supply side- very simple, primary record keeping in Relais with Alma recording item is under ILL process control. Great benefits to users, we think they are very happy with it. One key to success was the project committee working through all process options and making very clear decisions before documenting processes for staff. Paton records only to be maintained in Alma, libraries/suppliers only in Relais.
- Exception type activities take some time to work through, we are still working on both resolving processes around these and identifying new exceptions. Tidying up requesting within Primo, implementing latest Relais forms and finalising Alma display logic rules will happen over summer (at this stage our go live has been very soft with all previous pathways into ILL requesting remaining in place)
- Relais patron data cleanup required. And we will be performing a review of all the workflows based on our new processes (system and manual!)
- Still some things that still waiting for development, such as cancel and renew messages, plus recalls.
- Very grateful to UNSW and Monash who went before us and shared their documentation and experiences. Documentation still requires some work from both Alma and Relais, we are working on encouraging this to happen.
**POST-IT NOTES’’ SESSIONS CONT.**

**Margarita Moreno – National Library of Australia (Relais)**

**NCIP**

- Relais interoperates with Voyager via NCIP, with a low cost ‘pipe’ built from Voyager by the Library internally to make this happen.
- Great benefits from interoperability between Relais and Voyager:
  - Saved on average 2 hours staff time per day for checking in and out ILL loans
  - Minimised the human errors
  - Synchronised the ILL loan status in both systems

**Kaye Foran – Te Puna, National Library of New Zealand (VDX)**

- All New Zealand libraries use the same system VDX and the same version v7.3.1
- All New Zealand libraries use DocStore by default.
- The majority of libraries use Te Puna Interloan, a managed service hosted by OCLC.
- New Zealand Te Puna Interloan is a much simpler environment.
- Auckland University and the LCoNZ libraries each have their own servers but are also a managed service hosted by OCLC.
- ISO ILL operability (specifically with LADD libraries) is managed by OCLC.

**Anya Smeaton – University of Western Sydney (Relais)**

- We use Relais and Alma – they seem to interact well together
- We request from and supply to all LADD and Te Puna libraries, both loans and copies
- We supply copies, but not loans, to overseas libraries
- We request copies from Subito and directly from overseas libraries, but we don’t request loans from overseas libraries
- We don’t use NCIP

**Louise Dick - CARM Centre (Relais)**

- Predominantly a supply-only service, providing access to material from the CARM shared collection
- ‘Library use only’ monographs and high-quality copies – send via email, post-to-web, FTP/Ariel or Docstore as required
- Requests received via ISO ILL to Relais ILL, or via email and processed outside Relais
- Not using NCIP with Aleph ILMS at present
- Routinely use ‘Will Supply’ and ‘Conditional’ messaging through the LADD Gateway
FUTURE ISO ILL PARTNERS MEETINGS

At the close of the meeting, Monika Szunejko thanked everyone for their participation and contributions to the meeting. In particular the work of Anne Xu (A/Manager, LADD) and the LADD team was acknowledged as they had endeavoured to create a meeting that would be beneficial for the ISO ILL Partners group. Two surveys had been distributed to ISO ILL Partners to ascertain the primary interests of the group and the LADD team had consulted informally with ISO ILL partners with the aim of preparing a meaningful and topical agenda for the meeting.

The purpose of the ISO ILL Partner meetings has been to provide a forum for the Australian community to meet with fellow ISO ILL partners, system vendors, and hosting service providers to discuss ISO ILL issues. The meetings have had a practical focus and have been valued by the ISO ILL Partner community. Hosted by Libraries Australia often with the support of some library system vendors, the meetings have been particularly useful while libraries were in the process of moving to ISO ILL compliant systems, but as of 2014 most libraries have now moved to ISO ILL compliant systems. Notwithstanding the development and implementation of the new ISO ILL Standard the discussions of the group relate to technical issues and ‘business as usual’ matters.

Libraries Australia is seeking to broaden the discussion around national resource sharing issues. Libraries Australia is eager to engage the resource sharing community beyond ISO ILL. Participants at the 2014 ISO ILL Partners meeting may themselves recall that the discussion became livelier when the meeting went off ISO ILL topics. Libraries Australia has identified the need to re-invigorate and expand the conversation in this time of change in the resource sharing landscape.

In this context, 2014 is the last year that the ISO ILL meeting will be held in its current form. Libraries Australia values the contribution of the ISO ILL community and will consider a more effective way for the ISO ILL Partners to exchange ideas and discuss issues that are relevant to ISO ILL – especially around this time of the development and implementation of the ISO ILL standard.

Future ISO ILL Partner gatherings will take a different form – either via a round table teleconference, or alternatively via an e-update or newsletter where all ISO ILL Partners contribute.

Libraries Australia thanks all the participants at the October 2014 meeting and all ISO ILL Partners, system vendors and hosting service providers who have generously contributed their support to establishing a robust ISO ILL community in Australia.

We look forward to future lively discussions and actions related to the evolution of resource sharing in Australia.

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