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FIL Newsletter
Forum for Interlending

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Off to Edinburgh!

By Suzie Kitchin
University of Leicester Education Library

Having come to Interlend 2001, the thought of writing 1000 words for this newsletter, in the same period as writing a 3000 word essay for my library course, did not fill me with glee..! However, I was more than happy to do so, as this was the only condition on FIL granting me one of the student bursaries for the conference. Let me fill you in on who I am, and where I fit into the interlending world.

My job involves working in the University of Leicester Education Library, with two main "hats". I do the inter-library loans for Education, and support distance learning students worldwide with a range of library services, having particular responsibility for document delivery.

When I'm not doing my paid work, I'm studying by distance learning for an MSc Econ. in Information and Library Studies at Aberystwyth University. This involves an annual study school, and independent study throughout the rest of the year. It's a good way to do your professional training, if full or part time studying is not appropriate for your personal circumstances. Even though I've only been doing the course since April 2001, I'm already finding I can put into practice what I'm learning. As it's vocational training, this is both a satisfying and useful outcome at such an early stage.

My thanks go to the FIL Committee, and budget (!), for enabling me to come and experience your conference. The location of Heriot-Watt University was very good, with conference facilities including very pleasant en-suite bedrooms. They were very comfy and clean; it was a pleasure to return and relax during the odd gap in the programme. I slept like a log after each day's activities.

On arrival, hearing comments like, "Isn't it lovely to see everyone again!" made me wonder if I was the only Interlend novice, but fear not! I was quickly chatting to other delegates, discovering fellow novices as well as seasoned Interlenders. There was a good mixture of people who've spent many years in interlending, as well as those of us who've become involved more recently. One request for future conference speakers would be to make sure acronyms are clearly explained the first time they are used. We're all guilt of slipping into jargon (where would we be without the BL reply codes?!), but there were times when I felt I was losing the plot, when acronyms were being banded around with the assumption everyone knew what they represented.

All presentation and discussion subjects were very topical, based around the theme, "Great Expectations." They ranged from resource sharing for medical students, unmediated Open University document delivery, to remote island services in Scotland. Robin Green lead a presentation on the Leicester Warwick Medical School (LWMS), describing the background leading to the establishment of the School, and how library services have been adapted for this new development. Being at Leicester, the LWMS has been discussed in meetings I've attended, but it was really interesting to hear Robin giving a broad overview of the situation. Sometimes matters in your own institution can become clearer when you stand back from them, although I'm not advocating the need to travel to Edinburgh each time we need to gain a clearer picture of what we're doing!

Events such as Interlend 2001 enable you to find out how other institutions are approaching similar situations to yourself. During the Open University (OU) workshop, "From mediated to unmediated document delivery", I learnt that users' requests are send direct to the British Library without being checked by OU staff for in-stock items. I was really surprised by this, but in chatting to the OU staff, it was described as being the most suitable course of action for the OU and its clientele. The Great Expectations theme of the conference ran through all the sessions, and it emphasised the need of making sure we find out what our users' expectations are, and providing appropriate services.

Jonathan Willson from Manchester Metropolitan University lead the final presentation on "Interlending-who's going to step in your shoes?" As a lecturer in the Department of Information and Communications, he spoke about current trends in library and information studies (LIS), and the implications this may have on interlending workers. As a current LIS student myself, I found this very interesting, and in part felt like a kind of careers talk, making me wonder where I'll end up when I've finishing my course!

Eventful train journeys appear to becoming a trend with my travel to and from FIL events. On travelling to Preston for a day last year, the trains conspired to make me miss most of the morning event. The journey to and from Edinburgh was even more eventful! The outward journey involved a heated interchange with the train driver and a lorry narrowly missing each other. Returning to Leicester after the conference was a whole experience in itself. Faulty power cables reduced the East Cost Mainline to a near standstill. Our journey home included being transferred to a coach, which subsequently overheated and the driver got lost!

It was an eventful journey – I learnt the proper way to eat haggis, and, to her embarrassment, Jenny Chambers had her revised return journey announced to the entire train! Nine and a half hours after leaving the University, Linda Clark and I finally pulling into Leicester station. I had had a really good couple of days, and am very grateful for having the opportunity of attending the conference. It was highly relevant both for my interlending work and my library studies.

Next year the conference will be at Exeter University

To be sure not to miss it, put the dates in your diary now!

1st – 3rd July 2002

Conference workshop 1
British Library user services
Zetoc/Inside

A report from Sheila Houldin
Cheshire Libraries

This workshop was marked with the usual air of anticipation, not so much "Will this change my life?" as "will the technology work?" With a little extra help the technology did deliver, to the palpable relief of the speaker.

Peter Robinson of the BLDSC gave us an overview of the new service offered by BLDSC as part of its Inside Service. As a public librarian I felt this was a valuable session as an exercise in current awareness, even though one did feel a little like the child with its nose pressed against the toy shop window. Visions of the service that could be offered to any library user doing research on their own behalf are tantalising.

Our speaker concentrated on describing Zetoc, an offshoot of Inside. Zetoc is a relatively new service, which uses the British Library's electronic table of contents to provide a current awareness service, free of charge, to academic libraries. To be fair it should be pointed out that academic libraries do support the system financially through JISC [Joint Information Systems Committee]. MIMAS [Manchester Information and Associated Services] has also collaborated with BLDSC and JISC to create this service. Non-academic users can subscribe via "Inside" and trial periods of 30 days, or 1 week for personal users, for Zetoc can be arranged by BLDSC.

Zetoc is a database of 16 million article titles from over 20 thousand research journals, updated daily by 10 thousand articles. The majority of the articles cover technology and engineering and there is international coverage.
25% of the journals are U.K. titles. Having found an article through Zetoc the user is assured that this is available from BLDSC and can order it through their library. We also noted that the service is Z39.50 compliant, user friendly and fast.

Thanks to modern technology we were given a full demonstration of the way in which users can carry out searches. A general search can be carried out or limited to conferences or journals, it is possible to enter subject terms for a search. An impressive array of citations was called up in the demonstrated search and the way in which can then be sorted into the order the user finds most useful. Full details of the periodical or conference, from which the article is taken, can be called up on screen, which should make a requesting librarian's job easier. Unverified orders can be put on the system by a student for verification by a supervisor. The user can also keep a record of their search.

Zetoc provides a current awareness or "Alerting" service; the user can submit a list of journals they want searched on a regular basis and can elect to what e-mail address articles should be delivered.

Future developments include a direct ordering link to BLDSC and an arrangement whereby the copyright fee will be paid by the end user. It is also hoped, at some time to link Zetoc with other databases of serial holdings, eventually it should be possible to search national holdings of serial titles not just the BLDSC. That however is a development some way in the future. But the future does seem to happen very fast these days.

Following the demonstration there was an opportunity for questions and discussion. The consensus of opinion seemed to be that this was an impressive and useful service. As a public librarian I imagine the only way forward for us to access these services, given our budgetary constraints, is to form co-operatives, or perhaps the new regional authorities could have a role to play.

For a public library user trying to work or study without the benefit of access to this type of service it must be frustrating to know that that it is available but at a price. As a public librarian asked to do subject searches it certainly is.

A useful handout outlining the service completed the presentation.
Zetoc is available at http://zetoc.mimas.ac.uk

Conference workshop 2
From mediated to unmediated document delivery: how far have we come, how far can we go?

A report from Avril Patterson
University College Dublin

This workshop certainly made all of us think. In their introduction Clare Boffey and Julie Pethick outlined the ILL/DD service in the Open University Library and explained that the introduction of a new library system forced them to re-evaluate their service. In this workshop they shared this experience and the issues involved.

As an exercise the workshop participants identified the level of mediation offered routinely in our ILL/DD services – e.g. (bibliographic verification, location checking etc. The "essentials" (e.g. collection of copyright declaration forms) and "desirables" (e.g. in stock checking) were then identified. Suffice to say that the essential list was very much shorter than what was listed as current practice by many participants.

This exercise served very well in uncluttering our brains of what we thought to be essential or even desirable! With the introduction of the Voyager automated system, the Open University Library had the choice of continuing to mediate, but with detrimental effects on staff time, or to experiment with unmediated requests. They chose the latter.

Readers can place requests from their desktops, with copyright declaration downloaded and forwarded to the library. All requests are sent unmediated to BLDSC and library staff only act on failed requests. Journal articles are forwarded to readers on receipt, provided a copyright declaration has been received and readers are advised of the availability of loanable items by e-mail.

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The most obvious advantage is the reduction in staff time in processing requests, while providing a fast accurate service for the majority of requests. However some problems exist, some of which could be resolved with improved technology – e.g. if catalogue check was inbuilt, in stock items could not be ordered and duplicate orders identified. The old chestnuts of obtaining copyright declarations and finance still exist – perhaps electronic signatures and smart cards could alleviate this.
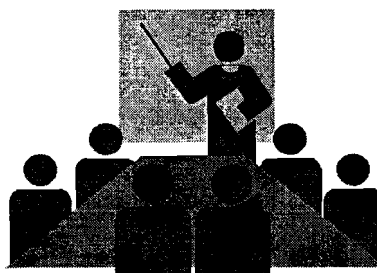
In the future the Open University Library hopes to offer BL Inside and Scientific World service to their readers, thus reducing the number of journal articles/conference papers requests via ILL/DD and will concentrate on obtaining older and more difficult to source material.

As DD to the readers' desktops becomes a reality, the role of ILL personnel will be an advisory one – training and advising on appropriate services.

Thanks indeed to Clare and Julie for an excellent thought-provoking workshop.

Conference workshop 3
BLDSC and copyright

A report from Angela Faunch
University of Kent at Canterbury

Graham Cornish, British Library Copyright Officer, led a workshop entitled "BLDSC and Copyright".

Graham, an acknowledged expert on the subject with several publications to his name, guided us through the mystery and mayhem of copyright law in relation to interlending and document supply.

His opening statement was that BLDSC "is exploiting the law" in the best possible way to serve its readers. He explained that "library privilege", whilst not in itself a legal term, is a useful shorthand for the law of copyright relating to libraries. Under this provision, libraries are allowed to copy for their readers, for other libraries and for purposes of preservation and replacement. Copies made for readers and other libraries must be charged for.

When a user makes a copy for himself he can invoke "fair dealing" – again not a legally defined term. Thus fair dealing only applies to individual readers not to libraries or library staff. Under library privilege a member of library staff on behalf of a reader can only make or obtain one article from any one issue of a periodical issue, or a "reasonable proportion" of a non-periodical work. "Reasonable proportion" has no legal definition once again! In these circumstances, to fulfil copyright regulations the reader must, of course, have completed a statutory copyright declaration.

Graham went on to explain the distinction between prescribed libraries and non-prescribed libraries. The former category includes public, national, government, local authority and academic libraries. These libraries can legally receive copied material into stock for educational purposes and obtain material for individual readers through library privilege. Non-prescribed libraries, such as those of commercial organisations do not have these rights.

Copying for purposes of preservation and replacement was also discussed. For example, a prescribed library can legitimately obtain a whole copied issue of a periodical or whole work, previously purchased, but now missing or mutilated and no longer available for purchase in the original form. However, such an item can be offered on a "reference only" basis within that library. Many of those present at the workshop were not aware of this possibility.

Graham continued by explaining the necessities and advantages of the British Library's Copyright Fee Paid Service. This permits copying beyond the statutory limits under the worldwide licence granted to BL by the Copyright Licensing Authority. As a payment is made to the copyright holder, non-prescribed libraries are able to apply as if they were a prescribed library and no declaration form is required. The service is available to all, including individuals, and is mainly used by non UK-libraries and for the British Library's premium services such as Inside.

Much material is now being stored digitally – the British Library has agreements with three publishers and is soon to add two more. It is hoping to encourage a standard multi-site licence to facilitate scanning and storage of paper material leading to generations of copies from digitised data.

There are hopes to review and improve the original licence in the light of other licensing initiatives such as the Publishers Association/JISC model licence for electronic site licensing in the HE sector. Many aspects of the publishers' rights and the needs of the British Library and its customers are still under discussion but a sample licence has been agreed in principle. It is hoped that in the not too distant future the minefield of copyright might become a safer and easier area for the ILL practitioner to negotiate.

Graham Cornish certainly helped to draw a clearer picture for the workshop participants, of what copyright law means to us now and how it might be simplified in the future.

Have you changed any procedure or started any new service because of information given in these workshops?

If so, please share your experiences with others through this newsletter

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News From The Regions

News from the North West

UnityWeb for all!
BURY USERS HAVE DIRECT ACCESS

Bury Libraries are now providing full public access to UnityWeb at two of its libraries through its 'Book Finder Computers'. Enquiry desk access is also available at five branch libraries to enable staff to assist the public.

The UnityWeb public access service was officially launched at Bury Central Library on 30 July. Sue Doyle, Senior Interlending officer at NWRLS, represented UnityWeb at the event.

Launching the service, John Carter, Bury's Cultural Services Manager said "We welcome the opportunity to make UnityWeb available to our staff and library customers. Its powerful but easy-to-use search facilities will enable our users, for the first time, to locate immediately the materials they need in library collections nationwide.

"As a library service which puts a high priority on providing services for the sensory impaired, we are particularly pleased that the interface has been designed to facilitate accessibility for visually impaired users".

Bury's Learning Support Librarian Christine Almond welcomed UnityWeb from a lifelong learning perspective. "In today's fast-moving world, there is an even greater need than ever before the access to information and materials that help people to develop new skills or to acquire new knowledge.

"UnityWeb is particularly useful for learners, giving them the opportunity to search for materials online, wherever they are located".

IFLA conference, Boston
16 – 25 August 2001

A report from Pennie Street
University of Liverpool

The conference was the largest ever, attended by over 5000 delegates. Following the Section committee meetings on Saturday and council meetings and the opening of the exhibition section on Sunday, the official opening ceremony of the 67th IFLA took place on Monday and was followed by a reception at Boston Public Library. Since my role is as a member of one of the Section committees, I'll essentially report on the activities of this group during the conference week and my involvement with the various events.

Committee meeting 1 (Sat 8.30-11.30)

* Standing committee welcomed new members. A large number of the committee were leaving 11 members) as they had served the maximum two consecutive terms, this included the Chair (Agneta Lindh - Sweden) and Secretary (Chris Wright – US). There had been an election as there were more nominations than places available and new members were elected from the US, Sweden, Thailand, France, Norway, Ghana, Mexico, Belgium, Spain, Germany and Canada. Mary Jackson (US) was elected the new Chair.
* The format of the Newsletter produced by the Section was discussed – the viability of moving to electronic – it was felt that print should also continue as many third world countries did not have Internet availability.
* The viability of continued sponsorship of the biennial Interlending and Document Supply conference (in Slovakia this Oct) by the Section was discussed.
* It was noted that the new Principles and Guidelines were now available on IFLAnet.
* The issue of forming project-based working parties within the Section was discussed. Since one of the greatest difficulties is meeting (members only meet together formally twice a year at the Conference) it was agreed to set up email discussion groups. A list of the projects (arising from the Committee's two year action plan [to be produced] would be circulated to all members and expressions of interest in specific areas should be conveyed to the Chair who would then establish working parties made up of interested participants.
* Sections were required to update their medium term programmes to a two-year action plan with goals and priorities. It was agreed that this would be discussed further at the Section's second meeting on Friday and that a sub-group (Mary Jackson, Carol Smale, myself, Poul Erlandsen, Beth Hanson, Christelle Creff-Walravens, Lone Hansen) would meet in the meantime to work on a draft to be presented to the committee for final discussion.
* Ideas for a programme and/or workshop for Glasgow were discussed.

Rough suggestions included:

1. Vertical portals to resources and the ILL/Docdel elements of this.
2. Globalisation of ILL – challenges of physical delivery/payment.
3. Expense of information provision in the information environment.
4. Digital divide – global access and delivery for all?

It was agreed that this be discussed further on Friday and that past serving committee members would meet before this to make a recommendation based on one of these thematic suggestions with ideas for a programme of specific topics under this umbrella.

Breakfast meeting (Sun 7.30-9.30)
The aim was to prepare a draft of the Section's strategic plan for 2002-2003. It was agreed that, given the short timescale, this should not be overly ambitious and contain too many individual goals. It must be achievable and workable given that most of the committee's work is achieved via email given the geographic spread of members.
The following priorities and goals were decided upon and would be presented on Friday for discussion.

Goal 1:
Monitor developments in user-initiated systems and services
- Develop guidelines for implementing a user-initiated service

Goal 2:
Promote the activities of the Section to document delivery and interlending colleagues
- Review and update the Section's website
- Review and update the Section's newsletter

Goal 3:
Provide continuing education opportunities for individuals working in the document delivery and interlending field
- Collaborate with the IFLA Office of Interlending to revise the model training handbook
- Collaborate with ?? on the dissemination of guidelines for the blind and visually impaired

Goal 4:
Address the special problems of document delivery and interlending in developing countries
- Produce a programme for the Glasgow 2002 conference

ILL/Docdel programme (Mon 10.15-1.30)
The programme, planned by the Section for Boston 2001, was entitled **End user involvement in interlending and document delivery.** 5 speakers from a range of countries outlined projects that were aimed at dealing with this issue. A lively discussion period completed the session. Over 50 delegates attended.

- The catalogue collectif de France: opening interlending services to end-users. (Christelle Creff – Project Manager, Document Supply Service, Bibliotheque nationale de France, Paris)
- Bibliotek.dk: immediate access to the Danish libraries – a path to follow. (Lone Hansen, Library Advisory Officer, Danish National Library Authority, Copenhagen)
- Interlibrary loan in Mexico: two solutions to an age-old problem. (Elda Monica Guerrero – Consultant, Daniel Mattes Durrett – University Librarian, Universidad Anaguac, Mexico City)
- Tradition ILL after OhioLINK: Pcirc and Ejournals. (Jennifer J. Kuehn - Head, Interlibrary Loan, Ohio State Library, Columbus)
- Union catalogs and virtual union catalogs – repositioning the Interlibrary Loan. (Barbara Preece and Joan Thompson – Boston Library Consortium, Boston)

Launch of IFLA Guidelines and Principles (Mon 1.30-3.30)

A formal reception, sponsored by OCLC, was held for all delegates after the Section's programme. Graham Cornish introduced the session and gave a brief history of the publication after which sub-committee members (myself and 4 other committee members) were on hand to answer questions and distribute copies of the Guidelines and Principles (now translated into the 4 official IFLA languages) and a free gift. The launch was extremely well attended and produced the desired publicity for this publication.

Meeting (Tues 11.30-1.30)

Existing committee members met, following a decision from the first Section meeting, to discuss the programme plans for Glasgow 2002. It was decided that a recommendation would be made to the full committee on Friday that the Section's programme for next year's IFLA conference should be **Global information: access for whom?** The idea would be to consider access and delivery of information and the repercussions for all nations, not just developing countries. Even richer countries have problems: barriers from government, cost, technology etc. Regarding the format, it was felt that the session should start with a theoretical paper which draws the larger picture followed by case studies to illustrate themes and concerns, an example being the Ghana Project that Lone Hanson was active in establishing. It was suggested that possibly someone from WHO could be invited to give the opening paper, touching on issues such as licensing and whether developments in this field have had any practical results. It was suggested that the new committee member from Ghana be invited to help.

ILL/Docdel workshop (Thurs 1.30-5.30)

This workshop was entitled **The ISO ILL Protocol: Demonstrating Interoperability** and took place off-site at Boston Public Library. Due to the room size, attendance was limited and delegates had been asked to pre-register for the session. In total, 60 delegates registered – the session was a great success and generated a lot of interest and questions for the vendors present. Mary Jackson started the session with a paper on the non-technical overview of the ISO ILL Protocol that covered the history of its development and what it meant in terms of current ILL work. Distinction was drawn between the actual protocol and the application element of software systems. After Mary's paper, the various vendors participating were asked to give a very brief overview of their systems in relation to the ILL Protocol. The following vendors participated:

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Auto-Graphics Inc.
Product – Wings
Epixtech
Product – Resource Sharing System (RSS)
Fretwell-Downing Informatics
Product – Virtual Document eXchange (VDX)
The Library Corporation/CARL
Product – Library. Request
Research Libraries Group
Product – ILL Manager

The main part of the workshop was for the various systems to demonstrate their interoperability. This took the form of 9 ILL scenarios in which one or more of the vendors interoperated with each other to demonstrate how their systems "talked" to each other and performed a range of ILL tasks. The scenarios were:

1. Loan request filled by first lender.
   Requester: ILL Manager
   Responder: Library. Request
2. Loan request filled by first lender, with renewal.
   Requester: VDX
   Responder: Wings
3. Loan request filled by second lender.
   Requester: RSS
   Responder: ILL Manager, Wings
4. Copy request filled by fourth lender.
   Requester: Library. Request
   Responder: ILL Manager, Wings, VDX, RSS
5. Copy request filled by first lender.
   Requester: RSS
   Responder: VDX
6. Loan request filled by first lender.
   Requester: Wings
   Responder: ILL Manager
7. Copy request cancelled by requester.
   Requester: ILL Manager
   Responder: Library. Request
8. Copy request filled by first lender.
   Requester: VDX
   Responder: RSS
9. Loan request filled by first lender and item lost.
   Requester: Library. Request
   Responder: VDX

After each scenario there was opportunity for delegates to ask detailed questions from the vendors – interest was so great that each question session had to be drawn to a close by the Chair simply to allow all the scenarios to be tackled in the time available. After this formal session there was a chance to look at the systems and talk with the vendors on a one-to-one basis. Delegates could then request further or different displays of interoperability.

Committee meeting 2 (Fri 10.15-1.15)

- The draft of the goals/priorities was presented to the committee. A number of comments and suggestions for inclusion were made.

1) A working party of committee members should work on a publication on developing guidelines for surveys for end users. This was seen as a priority under goal 1.
2) Goal 1 was felt to be too specific and should be more generic – "systems and services" should perhaps be rephrased as "ILL Management."
3) The questions of pricing issues, electronic IFLA vouchers and recouping copyright charges should be reflected somewhere in the goals.
4) The question of "electronic ILL" which was in the previous goals/objectives should be included in the new ones.
5) A goal should be added to consider the question of electronic supply – the committee should look at the role of document deliverers and the changing role of interlending.
6) A goal should be added to take into account electronic agreements. These should not exclude ILL and wording should be in licenses to protect this element of library activity.
7) The area of document delivery within organisations rather than between organisations/countries was raised.
8) The threat to docdel/interlending from the business market as publishers move to a transactional/pay per view model rather than a subscription based one was seen as an area that the Section should address in the goals.

It was decided that the above comments would be taken on board and Mary Jackson would send the revised strategic plan to all committee members for them to indicate areas of interest that they would actively like to be involved in. I have expressed an interest in Goal 3.

- The question of a change to the Section's name was debated.
- Further discussions of the Glasgow programme – the suggestions from the earlier meeting of existing members was outlined and approved as a suitable programme theme. It was suggested that, since IFLA 2002 is in the UK, it would be an idea to have input from the BL on the role of a large document delivery centre. Is there one?
- Initial planning for Berlin 2003. Thoughts for content included copyright, the future of large document delivery services, the role of institutions as gateways to east European countries, document delivery and economic/social/political growth in east Europe. All ideas would be forwarded to the Chair who will collate them and send details to the committee. Further plans will be by email discussion and a sub-committee will be set up in Glasgow after the first full committee meeting to take the planning forward.

In addition, there were some good programmes on other areas related to interlending. I attended sessions on copyright and other legal matters and the licensing discussion group. In addition there was an excellent range of exhibitors and I had chance to see demonstrations of many of the new developments available: library systems, ILL systems, British Library, publisher's initiatives re electronic journals.

End of an era, beginning of a regular column?

"Your letters to the editor"

Dear FIL members

After 15 months on the committee, and many moons in interlending, I'm moving on to pastures new. I'm very sad to leave the interlending pasture. It was lush, green and pleasant, with some slight undulations to keep it interesting. However, I'm moving over to the recently ploughed library publicity and promotions pasture, which has new and exciting scenery, rich soil, and many trees of opportunity!

I've had a great time in interlending, and really enjoyed being on such an enthusiastic and cheery FIL committee. I will never approach a committee meeting with dread again!

I hope you have enjoyed the incremental changes to the newsletter (the LA course told me not to be radical!), and I'm sure Jennifer Cox will have just as much fun taking over the editorial role from the next issue. I wish her, and the rest of the committee well.

Kind regards

Julie Pethick

FIL COMMITTEE

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