

ILL Policy Directory Call
May 23, 2002

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John Bodfish
Don Bohn
Ed Davidson
Mary Jackson
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? other OCLC Staff

- 1) Kerry stated goals of call –
 - tie down details on information model
 - decide how to move forward – and get volunteers to make progress on documents
- 2) Kerry reviewed the documents that were distributed to be discussed
 - Objects Updated in Directory Information Model Diagrams Version 9.
 - Updated and Annotated Enumerations for ILL Policy Directory

Supporting documents

- Directory Services for Interlibrary Loan – Information Model Diagrams Version 9
 - ILLPolicyDirectory22May.xsd
 - ISO/AWI246 – Skeleton for ISO 2146
- 3) The meeting worked through the Objects Updated in Directory Information Model Diagrams Version 9. Section A Items for Resolution.
 - Issue 1. ServiceTime Details – comments from OCLC about UTC time offset field

Resolution: Not to include this as a separate element in directory schema

- Issue 2 Request Methods Supported – OCLC wants some additional elements added to differentiate different types of paper forms

Resolution: Add an additional RequestFormsAccepted element – some initial enumerations have been defined for this

- Issue 3 (a) OCLC wanted a more definitive way to identify Hosted ILL system– OCLC wants 2 new enumerations to replace Hosted ILL system – new elements would be Hosted ILL System – Service and Hosted ILL System – software – Mary Jackson had some questions on whether this made the proper distinctions

Resolution: OCLC decided to withdraw this request

- Issue 3 (b) OCLC identified a problem with the Request Method – Electronic Message Type. At the April Meeting we agreed this should have been ElectronicAddress but the diagram went out without the change. OCLC points out that electronic and physical address fields are inconsistently defined within RequestMethod. There was discussion about how to link RequestAcceptedFrom field to actual addresses for those methods – may be a problem in that there isn't a way to differentiate sending requests for different services (i.e. copy or loan) -

Resolution: OCLC will write up a proposal to fix this – also issue of Hosted ILL system and how to point at the real address – OCLC will come up with a proposal for solving this as well

- Issue 3 (c) Hosted ILL system in DeliveryMethods should be parallel to RequestMethods – and wants an structure which allows the Hosted ILL system to be stated.

Resolution: Implement proposal to add ILL Hosted System to the enumeration and use the carrier element to provide details

- Issue 4(a) – if ServiceTimesKey is omitted in ILLPolicyMatrix– how is this to be interpreted?

Resolution : make this field mandatory

- Issue 4(b) A further question then arises if no service is offered do all the mandatory elements need to be filled in? John suggested restructuring the element as a choice of service/no service where mandatory elements only need to be filled in if service is offered –

Resolution: Mark agreed to have a go at doing this restructuring

- Issue 5: BL raised the issue of Requester Category code including both libraries and individuals – BL wants a separate set of categories for individuals and to make the field a choice of library or individual users.

Resolution: The discussion on the list in December rejected this proposal. Agreed to remain with December resolution.

- Issue 6: ILL Service Charges – BL wants a separate charge descriptions for failure of service –

Resolution: Kerry to get back to BL for more information on this – question of whether you need a separate charge description or can be dealt with as an increment – there was a general agreement that the schema is able to handle this situation – just a question of how best to define the field.

- Issue 7(a) : BL asked about meaning of Any in ChargeDescription – suggested changing Any to CompleteCharge – Mary was not happy with this name

Resolution: As no purpose could be found for any that could not be expressed in another way, it was agreed to delete Any

- Issue 7 (b) : (extra to the agenda) Don brought up issue of the removal of service level from charges – how do you say my base charge is \$5 but I charge an extra \$2 for rush – Kerry explained how this is currently specified as an aggregation of Service with the Service Type / Service Level in the Policy Matrix. Don spoke of the potential for inconsistency between service and charges (Don will send email to the list for better

description) – Kerry is not entirely comfortable with current situation as it can be useful to see the prices for a service level displayed explicitly.

Resolution: Don will forward email describing his concerns to list so people can understand the issues

- Issue 8: BL wants some additions to Debit Card Enumerations – some of the enumerations were networks and not types of cards – some discussion about things that are just debit cards and do they need separate enumerations – different types of debit cards can be added to enumerations but don't need atm networks as separate enumerations.

Resolution: Add Switch, Solo. Investigate Maestro. Do not add Cirrus

- Issue 9: Delivery Method – do we need ability to say something about secure delivery and define file formats –

Resolution: MIME types will be used for file formats – and in Delivery Method Type Electronic Delivery Types enumeration – added secure copy and secure copy-scp – question was asked about GEDI and Kerry believes it has a MIME type but will check

- Issue 9 Material Types – BL wanted some more added – Mary had a question about Large Print – Kerry asked the question about whether we wanted to keep this enumeration as open with just some example lists -

Resolution: Agreed to keep the enumeration as open with three examples Kerry will make sure the IPIG Request Extension is consistent and will add GMD list and 3M SIP list of material codes as additional examples – Kerry changed name of Material Types to Medium Types – no disagreement with this change – Barb will provide the name of list as defined in 3M SIP scheme

The meeting ran out of time to finish list of proposed changes and to discuss forward progress. Moved on to OCLC report

4) OCLC Report

- OCLC reported on their continued investigation of LDAP versus X.500 – still researching – have identified 9 vendors – experimenting with IBM

LDAP server – haven't made a decision still pending – timeframe is waiting on IPIG schema and issue of referral versus server chaining – also still waiting on hardware. – OCLC encourage participants to send them questions about LDAP/X.500 or post them to IPIG list. Mark will write something up on difference between X.500 server chaining and LDAP referral for OCLC – moot point in that we discussed this and clarified the question for OCLC on the call – Mark will investigate capabilities in LDAP version 3

5) Moving Forward

- Kerry asked people on call to review proposed changes in section B and get comments back within 1 week – also to take a look at contents of enumerations.
 - Mark and Don agreed to get their work items done by May 28, 2002
 - Kerry went over next tasks – will send out list of tasks that need to be done and solicit volunteers – another conference call was tentatively set for about a month from this meeting (late June 2002)
 - The meeting agreed that the information model should be frozen at the end of this next round of comments
 - Kerry will give people 1 week to comment on things and will have a new version of the schema going out around June 4
- 6) Kerry briefly reported on status of ISO 2146 – mostly a placeholder so we can get ILL directory data elements in to it.