

The future of interoperability for ILL and resource sharing

by

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Outline

- Interoperability
- Background and history
- Emergence of new standard
- ISO 18626
 - Messages
 - Open and closed lists
 - Format and transport
 - Use cases and guidelines
 - Web page
- Status and next steps

Background and history

- ISO 10160/1 (ILL Protocol / ISO ILL) – 1991
- Pre internet. Early days of email. ILL systems emerging.
- Version 3 – 2007 – not approved.
 - No backwards compatibility
 - Insufficient difference between versions 2 and 3
 - Continued reliance on old underlying technology
- Approval for Version 2 an ongoing active standard for 5 years – 2012.

Background and history

- Australia – Libraries Australia Document Delivery (LADD)
- New Zealand – Te Puna
- TransTasman
- Canada – peer to peer
- China – CALIS
- Use in Japan and Vietnam

Background and history

- Based on outdated OSI technology.
 - Terminology and message encoding
- Uses its own model of an ILL transaction.
 - State tables dictate the behaviour of a request
- Very difficult to keep current and relevant.
 - e.g., billing types and delivery methods

Emergence of new standard

- In 2011 and 2012
 - Danish libraries – new library system
 - The British library – replace ARTemail
 - Rethinking Resource Sharing Initiative – future possibilities
- Common themes
 - Simplicity
 - No states
 - Minimal number of messages
 - Modern structures

Emergence of new standard

- Berlin, May 2012 – ISO TC 46 meeting – recommendations
 - Version 2 ratified for another 5 years. Ensures existing systems valid.
 - Minor editorial changes.
 - Group of interested parties requested to make a formal proposal to ISO.
 - Any new work in context of review of resource sharing standards.

Emergence of new standard

- Ad hoc group from: Denmark (lead), Australia, Canada, Finland, Germany, Japan, New Zealand, UK and US
- Editorial group:
 - Leif Andresen (Danish Agency for Culture/ The Royal Library)
 - Clare MacKeigan (Relais International)
 - Ed Davidson (OCLC)

Emergence of new standard

- Proposal to ISO in October 2012.
- Working group formed – ISO TC46 SC4 WG14 Interlibrary Loan Transactions
- Committee Draft submitted
- Editors continued adding transport mechanism and XML
- Editors also in contact with NISO NCIP Committee, aligned draft standard with NCIP, e.g., naming conventions

Emergence of new standard

- May 2013 – 22 yes, 0 no, 2 abstains
- June 2013 – WG 14 met, further clarification and refinement
- Sep 2013 – Draft International Standard balloting started
- Dec 5, 2013 – balloting closes

ISO 18626

- Simple to understand and implement
- Widespread use and adopted quickly
- Balance:
 - Communication with partners used on regular basis
 - One-off situations
- No states to restrict workflows

ISO 18626

- Three messages and confirmations
 - Request message, includes
 - Information needed to fill or respond to request
 - Supplying Library message, includes
 - Reason for message, e.g., Request Response, Renew Response, Cancel Response
 - Status information, e.g., Request Received, Will Supply, Unfilled

ISO 18626

- Requesting Library message, includes
 - Action, for example Received, Renew, Cancel
- Confirmation messages validates message received and indicates any errors (if required)

ISO 18626

- Open & closed lists – codify and standardize information exchanged
 - Closed lists – integral to standard. Use of closed lists minimized. For example: Reason for message, Status and Service Type
 - Open lists – used extensively. Included in an annexe. Allows for lists to be modified in future. Can be used between known partners. For example: Billing Method, Electronic Address Type, Reason Unfilled and Service Level.

ISO 18626

- Format and transport
 - Messages encoded using XML.
 - XML schema in an annexe. Allows for changes to be made easily.
 - Both http and https supported as transport protocols.

ISO 18626

- Use cases & guidelines
 - Provided in an annexe
 - Include examples of what needs to be included in messages in real life operational scenarios
 - Web page
 - For all details, including annexes, and news about ISO 18626
- <http://biblstandard.dk/ill>

Status and next steps

- Currently at ballot, December 5, 2013 is closing date
- Assuming majority 'yes' and no significant negative comments, standard will be published
- Working group (WG14) will provide guidance and expertise to implementers and adjust annexes as required

Status and next steps

- Need vendors to implement before you and your staff will see benefits.
- Need to see widespread adoption to achieve objective of broad based interoperability => improved efficiencies & easier access.
- Talk to your system vendor and make sure they know that this is important to you and your library

Thank you

➤ To:

- Leif Andresen (Danish Agency for Culture / The Royal Library)
- Katie Birch (OCLC)
- Ed Davidson (OCLC)
- Margaret Ellingson (Emory University)