The future of interoperability for ILL and resource sharing

by

Clare Mackeigan

Relais International
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
Interoperability

- Interoperability between ILL systems:
  - the messages that are sent
  - the way messages are sent
  - the content of the messages
Background and history

- Pre internet. Early days of email. ILL systems emerging.
  - 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- Based on outdated OSI technology.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 closed – unanimous support
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
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
  o 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://illtransactions.org
What does this mean for you?

- Not a panacea **BUT**
- When you want to send a request
  - No need to be part of a single system or use the same system
  - Whether a 'regular' partner or one-off
Status and next steps

- Standard is in publication/translation process
  - Anticipate publication in June
- Working group (WG14) will provide guidance and expertise to implementers and adjust annexes as required
Status and next steps

- ISO meeting in Washington - May 2014
- Vendor adoption to achieve objective of broad based interoperability => improved efficiencies & easier access.
  - Denmark
  - Relais International
  - OCLC (2016)
Talk to your system vendor and make sure they know that this is important to you and your library
Thank you

- Questions / comments