

Case Study: "IAMSLIC Z39.50 Distributed Library"

presentation for:

Communities of Resource Sharing: Grassroots Consortia

by

Barbara Butler

Who we are:

IAMSLIC stands for *International Association of Aquatic and Marine Science Libraries and Information Centers*. The group formed in 1975 as the "East Coast Marine Science Librarians" and has grown to nearly 300 members world wide. IAMSLIC hosts a number of active regional subgroups, is an all-volunteer organization and is the major professional organization for those involved in marine and aquatic science libraries. IAMSLIC members come from all types of libraries ranging from large marine and oceanographic institutes to the small one-person operations and thus represent both the net-lending and net-borrowing sides of the resource sharing equation.

Resource sharing in IAMSLIC (the plusses and minuses):

In 1984 a microfiche union list of marine science periodicals was produced by IAMSLIC and Virginia Seagrant (Meadows et al. 1984). *MUSSEL: A union list of serials in marine science libraries* contains 10,000 serial entries from 55 libraries.

- + A comprehensive list at the time of production
- Never updated

The *International Directory of Marine Science Libraries and Information Centers* debuted in 1987 and contained contact information and lending policies for IAMSLIC member libraries (Winn, 1987).

- + A valuable tool when produced
- In need of constant updating
- Has not dealt with changes in document deliver technology

The first IAMSLIC email discussion list was established in 1991 and was initially a way to share information and professional developments. The email discussion list soon became a major resource sharing tool as members (and non-members) posted ILL requests to the group.

- + Fast and easy way to communicate
- Inefficient (300 people receive the same ILL request)
- Many on the list were not able to respond to ILL requests
- Not limited to IAMSLIC members
- Searching responsibility transferred to lender

An analysis of the posting patterns in 1996 revealed that the email discussion list was being used less for professional communication and more for resource sharing needs (Butler 1997). IAMSLIC established a Resource Sharing Committee to recommend practices for the group. The committee examined many different possibilities including the use of IAMSLIC regional groups as the "first stop" for resource sharing, a three-tier system that guaranteed larger libraries last resort status, a separate listserv for ILL, partnering between large and small libraries and a voucher system. None of these options worked well for IAMSLIC. The resource sharing traffic stayed on the email discussion list with the stipulation that the subject line must say "ILL" as well as the title being sought to allow easy filtering by those unable to supply interlibrary loans.

- + IAMSLIC takes the first step towards formal resource sharing
- The email discussion list was still the primary ILL vehicle
- The system was still inefficient
- We still lacked an ILL generating system
- Requesters did not always follow established guidelines
- The email discussion list is open to non-members
- The responsibility for searching still rests with the lender

In 2000 the NOAA (National Oceanic and Atmospheric Administration) Coastal Services Center offered to include IAMSLIC in a pilot project they called the *IAMSLIC Linking Libraries Project* (Ball 2001). In their system, multiple Z39.50 capable library catalogs were queried in a single online search.

- + Single query searches all Z39.50 compliant IAMSLIC catalogs
- The variety of catalogs proves to be a technical challenge
- Not all libraries have OPACs, or Z39.50 capability
- We still need a way to complete the ILL transaction

The "*IAMSLIC Z39.50 Distributed Library*" was launched in 2002 (Watkins 2003).

- + Single query searches all Z39.50 compliant IAMSLIC catalogs
- + *Union List of Aquatic and Marine Serials* included
- + ILL module included
- + ILL module limited to IAMSLIC members only
- + Updating no longer a concern
- + Contact information retrieved from membership database
- Limited search options have been a challenge for some users

How the "IAMS LIC Z39.50 Distributed Library" works:

Figure 1 (modified from figure 4, Watkins 2003) shows how a query to the distributed library searches participating library catalogs as well as the *Union List of Aquatic and Marine Serials*. The requestor chooses a catalog record, provides the password to the system, selects their library profile from the membership database and generates an ILL transaction which results in an email message to the lending library with a copy to the requestor.

IAMS LIC Z39.50 Distributed Library: ILL transaction

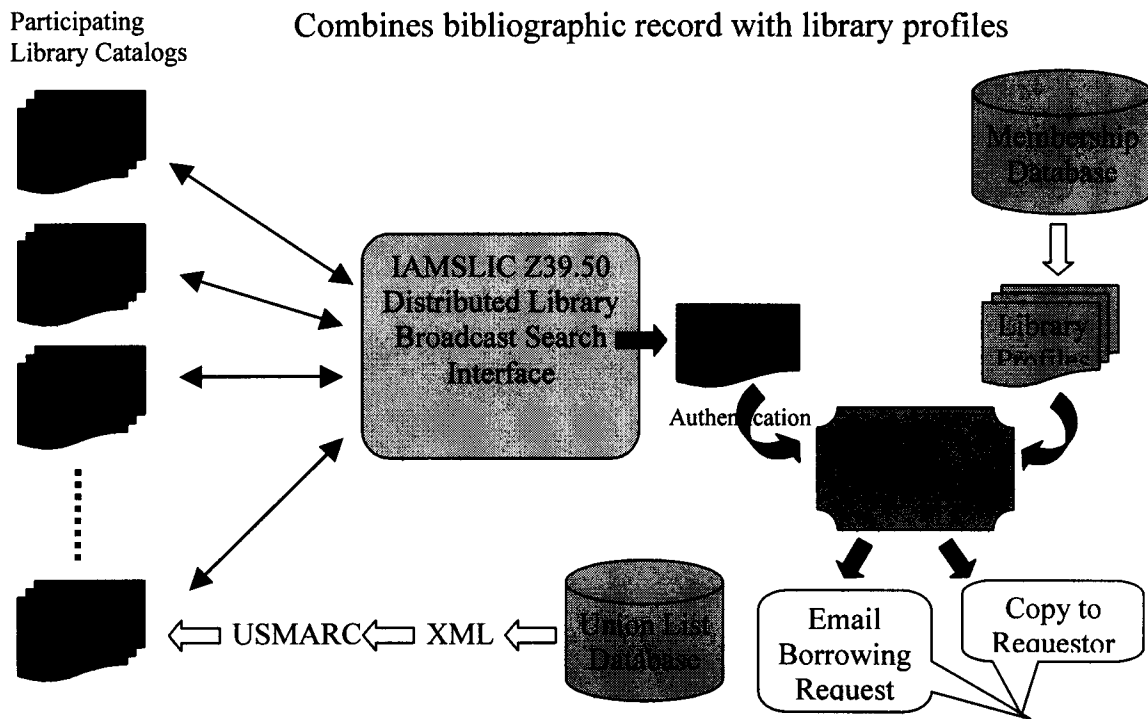


Figure 1: An interlibrary loan request generated by the IAMS LIC Z39.50 Distributed Library

IAMS LIC resource sharing goals and the role of the IAMS LIC Z39.50 Distributed Library:

Goal 1: Distribute the interlibrary loan burden

The *IAMS LIC Z39.50 Distributed Library* displays records from the *Union List of Marine and Aquatic Serials* at the top of the results screen. Smaller library holdings are listed first; larger institutions such as Marine Biological Laboratory are given "last resort" status and appear at the bottom of the listings with the note "(Please request from another library if available elsewhere)". A record of each transaction is recorded so

requesting patterns can be studied. There are now 53 supplying libraries to share the workload. Figures 2 and 3 show the lending and requesting statistics by library for 2002-2003.

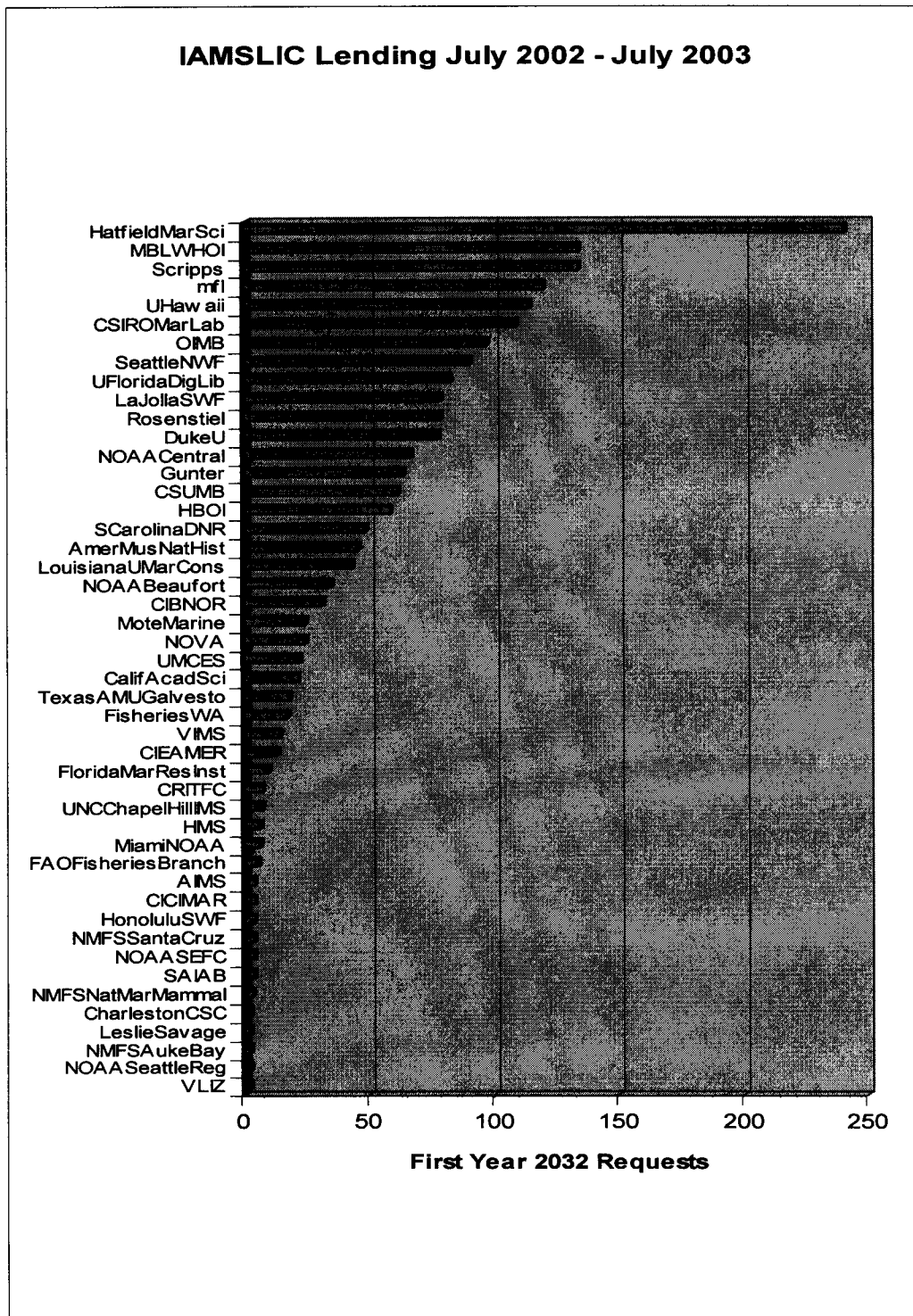


Figure 2: Lending statistics, by library (From 2003 IAMSLIC Resource Sharing Committee Report)

IAMSLIC Borrowing Requests 2002 - 2003

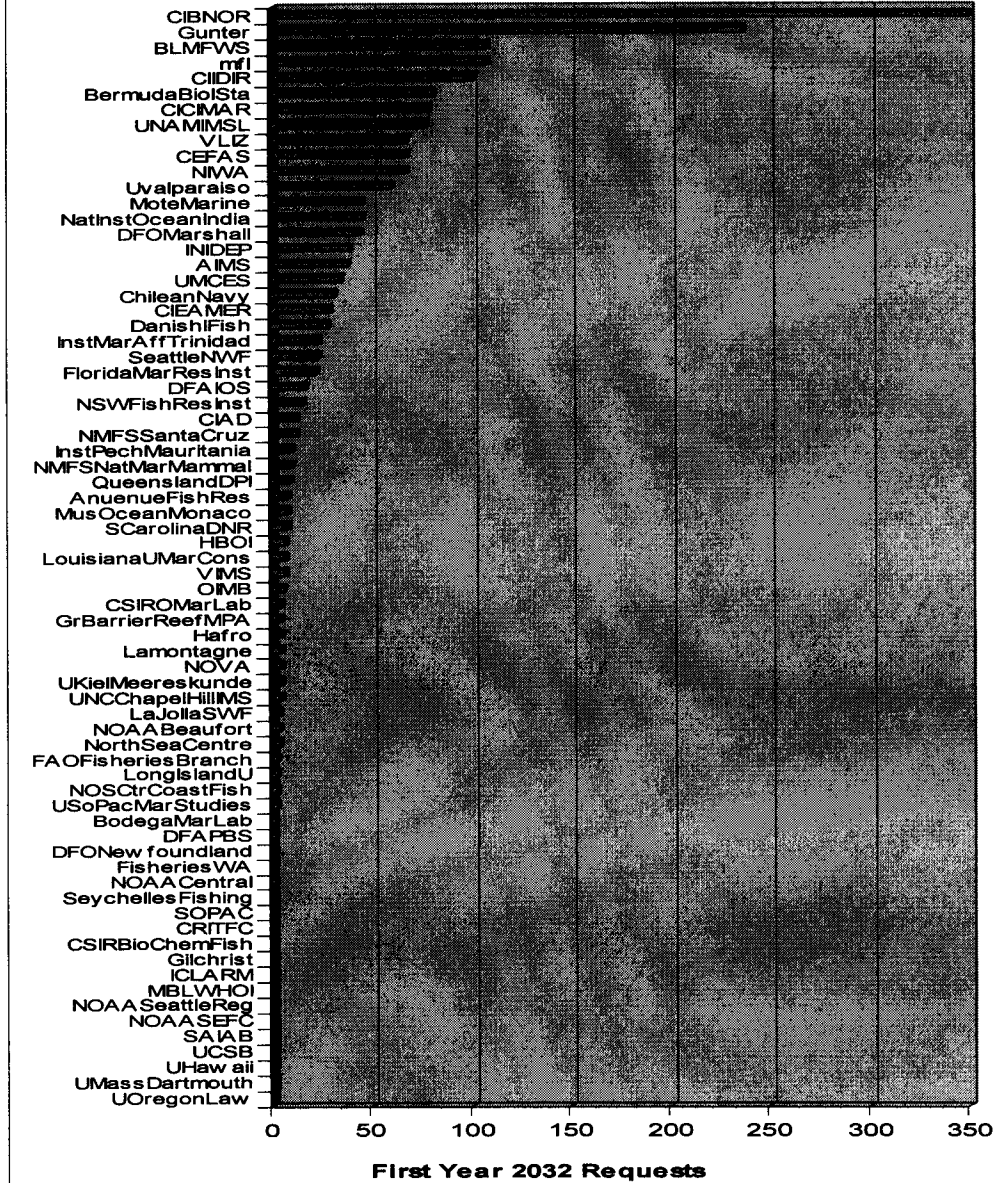


Figure 3: Borrowing requests, by library (From 2003 IAMSLIC Resource Sharing Committee Report)

Goal 2: Increased efficiency

Figure 4 shows a summary of the IAMSLIC email discussion list transactions. The percentage of postings relating to interlibrary loan requests has decreased from 51 to 29 percent during the first year the *IAMSLIC Z39.50 Distributed Library* has been in operation. Now, individual lenders are contacted rather than the approximately 300 members subscribing to the IAMSLIC email discussion list.

IAMSLIC List server			
	2002-2003 (12 months) (Sep-Aug)	2001-2002 (12 months) (Sep-Aug)	2000-2001 (12 months) (Sep-Aug)
Total messages	1025	1883	2112
Total ILL requests	212	579	687
Total Items Requested	336	1313	
Total requestors	79	109	127
Requestors requesting only once	36	33	37
All ILL (requests + replies + thanks)	300	963	1015
All ILL as percent of total messages	29%	51%	48%

Figure 4: IAMSLIC list server statistics (courtesy Jim Markham, IAMSLIC listserv monitor)

Goal 3: Include all compatible catalogs in the distributed library

There are currently 53 participating libraries and new additions occur on a regular basis.

Goal 4: Include small library holdings in the online union list of serials

There are currently 24 libraries using the online union list to access their serials holdings and the system is available for any willing participant.

Goal 5: Train borrowers to use the ILL module

This has been an ongoing project and the goal of the resource sharing committee for the next year is to develop training modules for both the *IAMSLIC Z39.50 Distributed Library* and the ILL module.

Goal 6: Help users overcome common mistakes

Training will be a priority for the resource sharing committee during the next year. One challenge in an international group is to accommodate the range of experience and training that each member possesses. Some members may be responsible for a library, but have no formal training. Mentorship will continue to be one of the primary benefits of an association with IAMSLIC.

Would this work for other consortia?

Possibly. Initial successes in resource sharing in IAMSLIC came about through group efforts. The success of the *IAMSLIC Z39.50 Distributed Library* is due to the efforts of Steve Watkins, Coordinator of Technology Development for California State University, Monterey Bay. Steve devoted his sabbatical to create and trouble-shoot the system on behalf of IAMSLIC. As we look to technology to meet our needs a consortia, particularly an all-volunteer organization, will need to rely on members with technical knowledge and attention to detail, or sub-contract the work to outside vendors.

References:

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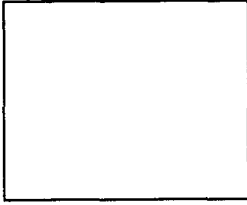
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Contact information:

Barbara Butler, Science Librarian
Past-Chair, IAMSLIC Resource Sharing Committee
Oregon Institute of Marine Biology
PO Box 5389
Charleston, OR 97420
(541) 888-2581, ex. 219 butler@darkwing.uoregon.edu



IAMSLIC Z39.50 Distributed Library

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Search Help and Tips

TITLE SEARCHES

TIP: Select unique words as a phrase from within the title.

Some of the catalogs will treat title searches as phrase searches within the title, while others will treat them as keyword searches within various title fields.

Therefore, select distinctive phrases from the title that will also work as keywords, or do two searches: one with a title phrase and one with unique title keywords.

TIP: Journal titles are also retrieved through a Title search.

Since serials are the most often requested category of publication, the Union List of Marine and Aquatic Serials database is the first resource in the results list from any search of the Distributed Library. However, for monographic series, you should also search using "Any" rather than "Title" as the search option.

TIP: Do not use abbreviated journal titles in a search.

The generalized Z39.50 search protocols that enable a single search query to be run against so many different library catalog systems do not support truncation, nor will searches on abbreviated titles be successful. Instead, use two or three full words from the journal title with the "Any" search option if you are unable to decipher the full journal title.

AUTHOR SEARCHES

TIP: Use the most unique author surname as your search term.

Author searches via Z39.50 are treated as keyword searches within the various author fields in most catalogs, so searches that include initials or even given names may not succeed. Try a Title or Any (keyword) search if your Author search fails.

INTERLIBRARY LOAN REQUESTS

TIP: Send requests to smaller libraries or those whose holdings are included in the Union List of Marine and Aquatic Serials.

A number of large libraries have offered their catalogs for inclusion in the Z39.50 search system. In the case of institutions such as the University of Florida, the University of Oregon, or the NOAA Central Library, these online catalogs are union catalogs of many different branch libraries within each institution.

However, the IAMSLIC members at those institutions may be located in only one or two smaller branch libraries. While they may be willing to respond individually to incoming ILL requests from other IAMSLIC members, they often cannot supply items from their main library's holdings. When you search these combined

catalogs through the Z39.50 interface, the local holdings information about which branch owns a particular item is not available, therefore it is not possible to limit searches to only those branch locations where IAMSLIC members are housed.

TIP: Go directly to publicly accessible electronic versions of publications.

Many documents found in IAMSLIC library catalogs are publicly available as electronic publications, often in the Adobe Acrobat PDF format. If you locate a catalog record that contains a "Link" in the "Electronic Version" field, try to obtain the electronic version directly before placing an interlibrary loan request to borrow it.

TIP: Join IAMSLIC if you are not already a member and want to use the ILL system.

IAMSLIC has been actively engaged in resource sharing on an international basis for many years through its email discussion list. The interlibrary loan requesting module that is part of the Z39.50 Distributed Library is restricted to use by current IAMSLIC members. Please visit the IAMSLIC Website for [membership information](#). If you are an IAMSLIC member and have questions about the ILL module, please contact [Steve Watkins](#) at California State University, Monterey Bay for assistance.

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