New ISO standard for ILL transaction, ISO 18626

*The future of interoperability for ILL and resource sharing*

by

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&

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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
- Danish implementation guidelines
- 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.

- Used in: Australia, New Zealand, Canada, China, Japan, Vietnam and Denmark
Background and history

- Based on outdated technology.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

- Initial conversations in 2012
- Common themes
  - Simplicity
  - No states
  - Minimal number of messages
  - Modern structures
- Alignment with NCIP
Emergence of new standard

- July 2014 - ISO 18626 published
- Or your national ISO member body
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
  - Supplying Library message
  - Requesting Library message
  - Confirmation messages validates message received and indicates any errors (if required)
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

- Use cases & guidelines
  - First version provided in an annexe
  - Include examples of what needs to be included in messages in real life operational scenarios
  - Working document – experience with the standard will result in new use cases & guidelines at the web page
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. Specification of transport is in alignment with NCIP
ISO 18626

- Annexes
  - Information website
  - Open Codes
  - The XML Schema
  - Guidelines – Use cases
  - Supplying library’s internal unique record ID
ISO 18626

- Web page
  - [http://illtransactions.org](http://illtransactions.org)
  - Contact: [info@illtransactions.org](mailto:info@illtransactions.org)
  - For all details, and news about ISO 18626
  - Open Codes - updated
  - The XML Schema - updated
  - Guidelines - Use cases - updated
Danish implementation guidelines

- Current work flow: search → holdings request → request → ILL messages
- Search: National Union Catalogue (NUC) DanBib/library.dk or by Z39.50
- Z39.50 Holdings Request to several libraries – returning a server unique ID
- ILL by Z39.50 service to library with shortest time to delivery using server unique ID
Danish implementation guidelines

- ISO 20775 Holdings Request to several libraries using a web service returning a server unique ID
- ISO 18626 request using the server unique ID as SupplierUniqueRecordId – still to library with shortest time to delivery
- Links to Danish profiles: next slide
Danish implementation guidelines

➤ *This slide just for reference:*

➤ Danish ISO 18626 profile for ILL transactions
  ➤ [http://biblstandard.dk/ill/dk/docs/Danish_ISO_18626_profile_for_ILL_transactions.htm](http://biblstandard.dk/ill/dk/docs/Danish_ISO_18626_profile_for_ILL_transactions.htm)

➤ Look-up of holdings information
  ➤ [http://biblstandard.dk/ill/dk/docs/Look-up_of_holdings_information.htm](http://biblstandard.dk/ill/dk/docs/Look-up_of_holdings_information.htm)

➤ Danish ISO 20775 profile for holdings requests
  ➤ [http://biblstandard.dk/ill/dk/docs/Danish_ISO_20775_profile_for_holdings_requests.htm](http://biblstandard.dk/ill/dk/docs/Danish_ISO_20775_profile_for_holdings_requests.htm)
Status and next steps

- Working group (ISO TC46/SC4/WG14) Interlibrary Loan Transactions continue with the editors*) as leadership
- Will provide guidance and expertise to implementers and adjust annexes as required
- Initiate a implementation community
- *) Leif Andresen + Clare Mackeigan + Ed Davidson
Vendor adoption to achieve objective of broad based interoperability => improved efficiencies & easier access.
  – Relais International
  – OCLC
  – Denmark
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

- Talk to your system vendor and make sure they know that this is important to you and your library
Thank you

Questions / comments

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