

In this issue:

Welcome to new Canadian member Libraries	1
Nigel Long named as Library Services Consultant for Western Canada	1
Virtual Reference Canada and QuestionPoint	2
The University of Montreal Reaches Patrons Virtually through QuestionPoint	4
The New ILL Policies Directory	4
Update on the Connexion Client interface	5

Welcome to new Canadian member libraries

- Statistics Canada
- Canada Customs & Revenue Agency
- Redeemer College
- Ontario College of Art Design
- Malaspina University College
- Glenn Gould Professional School of the Royal Conservatory Music
- Mount Allison University
- Marigold Library System
- Carleton University
- Tyndale College & Seminar

GENERAL INFO**New Library Services Consultant for Western Canada**

OCLC Canada has named Nigel Long as Library Services Consultant. Mr. Long is based in Calgary, Alberta and is responsible for introducing existing and new products such as QuestionPoint (virtual reference),

CONTENTdm and Olive (digitization) in Manitoba, Saskatchewan, Alberta, British Columbia and the Territories.

Prior to joining OCLC, Mr. Long worked in a variety of libraries in Great Britain and Canada and served as an Account Manager with a leading provider of subscription services in Western Canada. Mr. Long has also served as CASLIS President and as a member of the CLA Executive Council. He holds an undergraduate honours degree in library science and an MBA from the University of Wales in Aberystwyth.

“Canadian library activities have been growing significantly over the past five years. Nigel’s understanding of the region’s needs, the Canadian information industry and emerging technology, will improve OCLC Canada’s ability to provide quality consultancy services to Western Canada users and members,” said Mr. Boivin. “Nigel is going to be an outstanding Consultant, and we’re excited and honoured that he has chosen OCLC.”

“Mr. Boivin and his team have done a wonderful job in making OCLC Canada one of the best library partners in the world. I look forward to contributing to OCLC and supporting the organization’s mission to further access to the world’s information and reduce library costs by offering services for libraries and their users,” said Long

Nigel can be reached by phone at 1-877-858-2058 or by email at nigel_long@oclc.org

Reference

Virtual Reference Canada and QuestionPoint: Partners in VR by Franceen Gaudet, LAC; Brad Gauder, Paula Rumbaugh, Daniel Boivin and Jeffrey Penka, OCLC

I. History of CDRS, QuestionPoint and VRC

The QuestionPoint service from OCLC Online Computer Library Center (based in Dublin, Ohio) and the Library of Congress (LC) grew in part from a pilot program initiated by LC in 2000. In partnership with 16 libraries around the world—including the Library and Archives of Canada (formerly the National Library of Canada)—LC developed what became known as the Cooperative Digital Reference Service (CDRS) pilot. The pilot program aimed to establish methodologies and systems for implementing a collaborative 24/7 reference service for libraries working together to serve diverse library user populations around the world.

The CDRS pilot expanded to involve more than 300 libraries of various types in the U.S., Canada, the United Kingdom, Europe and Asia. Canadian participants included the Library and Archives of Canada (LAC), Vancouver Public Library, Burnaby Public Library, the University of Calgary, Toronto Public Library and CISTI.

Early in 2001, OCLC and LC signed an agreement to develop—in continuing consultation with reference librarians—a reference management system and service built on library collaboration and experiences from the CDRS pilot. The service was to make use of a database of library profiles and a best-match routing algorithm to enable automated question referral amongst the world's libraries. QuestionPoint, introduced in June 2002, grew directly out of this collaborative work. By the end of 2002, over 300 libraries (40% of which were outside the U.S., including the LAC) were actively using QuestionPoint. The University of Montreal and the Centre régional des services aux bibliothèques publiques de la Montérégie became the first two Canadian sites after the LAC to subscribe to the multilingual enhanced version of QuestionPoint and join the Global Reference network.

Building on architecture and profile data structures similar to those of QuestionPoint, the LAC introduced Virtual

Reference Canada (VRC) in 2003. Canadian libraries use VRC, at no charge, to submit reference questions that are routed to a network of Canadian libraries and information repositories that are qualified to respond. Currently, more than 200 institutions of all types, in all Provinces and the North, participate in VRC.

II. What is QuestionPoint?

QuestionPoint is a virtual collaborative reference management service that enables libraries to respond to, track and manage reference questions received from library users through a World Wide Web interface. A subscription to QuestionPoint provides:

- Access to a professional community of librarians who work together to develop standards, best practices and the QuestionPoint service itself.
- An interface that provides local online reference service and the ability to refer questions to other libraries locally, regionally and globally.
- Tools that support a variety of methods for delivering reference service including walk-up questions, e-mail, Web-based forms, live chat, voice-over IP, video, pushing pages and sharing applications.
- The ability to route and track the status of submitted questions.
- Local and global knowledge bases that store previously asked and answered questions for later retrieval.
- Usage statistics and reports that help librarians implement and maintain the service in their libraries.
- A customizable administrative module.

Each library that responds to a user's question through QuestionPoint is responsible for ensuring the accuracy of the answers provided. Libraries participating in the cooperative knowledge base are expected to follow guidelines established by the membership that cover quality and accuracy, response time, user-appropriate responses and general issues to ensure the integrity of QuestionPoint.

QuestionPoint also provides libraries with tools to add simple links from any page in their Web portals to support a locally branded and customizable question-asking service. This service can include Web-based submission forms, e-mail-based interaction and live chat for library users.

Libraries that already work with alternative service providers to address local reference needs can integrate QuestionPoint's global reference network with existing

services they use to provide comprehensive reference service for their users.

QuestionPoint is priced affordably on a subscription basis to encourage participation, improve efficiency through a comprehensive reference management system, and provide access to resources that may otherwise be unaffordable to libraries.

III. What is Virtual Reference Canada?

Seeing a void in the availability of networked electronic reference services available equally in both of Canada's official languages, and recognizing the CDRS model as a starting point, the LAC developed a bilingual reference system with a systems architecture and metadata structure similar to those of QuestionPoint. The LAC and the VRC service also work to facilitate member compliance with Canadian copyright and privacy laws. VRC member profiles contain additional profile metadata that is culturally relevant to Canada.

The bilingual, networked, national cooperative reference and referral service, hosted by the LAC, enables members across Canada to support each other's efforts in the provision of quality reference service. Membership in VRC is free and open to any library or information repository wishing to provide quality virtual reference service to end-users.

VRC's librarian-to-librarian system provides a question-routing application that allows VRC members to enter questions into the system on behalf of patrons. Each member institution is profiled according to languages of service, collection strengths and depths (with expanded profiling of subjects such as Canadian history), geographic scope for specific subjects, education levels served and other relevant data. Incoming questions, with their own sets of surrounding metadata, are matched against the metadata in member profiles to permit appropriate routing of questions. E-mail notifications keep participating staff at both ends of the transaction fully informed of the status of particular questions. A designated "on-call" librarian receives and responds to questions for which answers cannot be found within the VRC network.

VRC complements nicely what QuestionPoint offers to libraries. QuestionPoint allows a library to introduce and implement locally a complete, virtual reference service with the option to link its local application to the global cooperative that is OCLC. VRC's role is to offer a national networked reference service to Canadian libraries and information repositories. Canadian Information providers can first post their questions to other Canadian institutions

for responses if they cannot fulfill them locally. If unsuccessful, the questions can then be forwarded to the global cooperative offered by OCLC. VRC and QuestionPoint coexist to offer libraries and information repositories options including a local reference management system, a Canada-wide virtual reference network and an international network of information services as needed.

Moreover, LAC participation in QuestionPoint adds a broader dimension to the service the LAC extends to Canadian libraries and information repositories. As a QuestionPoint member, the LAC submits reference questions online to the Global Reference Network to obtain answers to questions for which Canadian institutions have none. In turn, the LAC answers questions assigned to it from other QuestionPoint libraries and helps develop the QuestionPoint global knowledge base.

IV. LAC and OCLC look ahead

Reference staff at the LAC and other Canadian libraries work side by side with OCLC staff and colleagues at the Library of Congress, advising on QuestionPoint development and helping to shape international standards that will guide future system developments. As well, OCLC, LC and the LAC are members of NISO's Committee AZ for Networked Reference Services <http://www.niso.org/committees/committee_az.html>, which is tasked with developing both a transaction protocol and core metadata element sets for networked reference interchange. The Question and Answer Transaction Protocol (QATP) will permit networked reference services to communicate amongst each other cross-domain, network-to-network.

The LAC and OCLC anticipate a long and fruitful relationship as both QuestionPoint and Virtual Reference Canada continue to grow, serve their respective users and implement virtual reference standards that will permit seamless, transparent interchange amongst users of both networks.

QuestionPoint: <<http://questionpoint.org/>>

Virtual Reference Canada: <http://www.nlc-bnc.ca/vrc-rvc/>

The University of Montreal Reaches Patrons Virtually Through QuestionPoint

The Université de Montréal's ÉPC-Biologie Library recently announced its migration to OCLC's QuestionPoint after a year-long trial using another commercial service. QuestionPoint, the collaborative virtual reference service developed by the Library of Congress and OCLC, combines a local reference solution with a global reference resource-sharing network to provide a cooperative, comprehensive and cost-effective service.

"Our initial virtual reference service pilot project has been received positively by our patrons in part due to the continuous involvement of all the personnel in place. The one year trial allowed us to recognize that we required a more adapted solution for our library needs. We believe that QuestionPoint will not only allow us to get closer to our users but also to improve our offering," said Marc Joanis, directeur Bibliothèques ÉPC-Biologie/Botanique, Aménagement et Musique.

"We are happy to count the Université de Montréal's ÉPC-Biologie Library as one of our first user of the enhanced version of QuestionPoint. Mr. Joanis' team has quite a bit of experience in providing virtual support and reference to its clientele and their input and comments are very useful to us. Université de Montréal's ÉPC-Biologie Library uses QuestionPoint in French which is also a first for OCLC Canada," said Mr. Daniel Boivin, director OCLC Canada.

Training

OCLC Canada offers training using a web-conferencing software at no charge. A schedule of demonstrations is distributed to members and users via our listserv on a regular basis.

If you need more information or training on a specific feature or service, send an email to Manon at manon_barbeau@oclc.org, she will be glad to organize a training session for your institution

Interlibrary Loan

The New ILL Policies Directory

The **ILL Policies Directory** provides users of OCLC ILL with a web-based, central source for entering and retrieving policies, billing, system, and contact information for member libraries worldwide.

You may access the Directory from within the OCLC ILL Web interface using your current ILL authorization and password.

If you do not use ILL Web as your ILL interface of choice, you can log on directly to the ILL Policies Directory at this URL

<http://www.oclc.org/oclc/ill/illpolicies.htm>.

The ILL Policies Directory will replace the **Name Address Directory for ILL** on August 24, 2003.

Cataloguing

Update on the OCLC Connexion client interface

The Windows-based Connexion client interface is currently in field test, and we have discovered some performance issues related to response time which do not meet the criteria that OCLC cataloguing members have come to expect. Improving the response time for both the client and browser interfaces is a top priority for OCLC staff. Because we want you to have a positive experience when you migrate to the client, OCLC has decided to delay the release of the client interface. At this time, we expect the first release of the client (online cataloging functionality without NACO) to be in the September/October 2003 timeframe.

Since our top priority with both the Connexion client and browser is providing adequate performance levels, we will not be able to move all Passport functionality to Connexion in the schedule previously outlined. As a result, OCLC will extend the life of Passport for cataloging past the previously announced end of life date of December 31, 2003. The new end of life date for Passport for cataloging will depend on the release dates for the first and second phases of the client. OCLC will provide at least a six month notice of the new end of life date.

At this time, we are focusing on Passport functionality, and we have not finalized the plans for migrating CatME functionality. No end of life date has been set for CatME. The third phase of the client will include offline local files, batch functionality, and other CatME-like features. More information about phase 3 and the end of life for CatME will be announced at a later time.

We want to hear from you !

Please do not hesitate to send us your questions, comments or topics for future articles to canada@oclc.org.

For help or additional information, give us a call at 1-888-658-6583

Do you want the latest news and share ideas with other Canadian libraries?

Then, subscribe to the OCLC Canada listserv. It's easy ! Simply go to this URL

<http://www.oclc.org/oclc/forms/listserv.htm> and follow the instructions.

You can also unsubscribe from this page.