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BORN & LIVED: Raised in suburban Detroit by Canadian parents. Have lived in four states (Michigan, Indiana, Montana & Ohio) and three provinces (Manitoba, Ontario & Alberta).

FAMILY: Married with a daughter and a son.

EDUCATION: BA from Goshen College (Indiana).

MLIS from the University of Western Ontario.

FIRST REAL JOB: Reference Librarian for Carroll College (Montana).

PROFESSIONAL CAREER AND ACTIVITIES: After Carroll College, I worked as a Reference Librarian for Bluffton College with responsibilities for interlibrary loan, government documents and for systems. I then moved to the University of Calgary, where I worked as Distance Education Librarian and then moved into my current position.

IN MY SPARE TIME I LIKE TO: Watch Thomas the Train videos with my son. Gardening. Drive to the mountains and go hiking or cross country skiing.

FAVORITE BOOK: Hard to choose, but probably *The Salvation of Yasch Siemens* by Armin Wiebe.

GOAL I HOPE TO ACHIEVE FIVE YEARS FROM NOW: Find an interlibrary loan management system that seems to work for our library.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: Interlibrary Loan won't go away, but with the huge growth in electronic journals and with OpenURL finding aids like SFX, we will see a flattening or even a drop in requests for journal articles. I hope that we will see systems that truly interoperate with other systems and take advantage of all the standards: Z39.50, OpenURL, ISO ILL Protocol, NISO Circulation Interchange Protocol, etc. 

Six Years of CISTI Source at the University of Calgary

by **Robert Tiessen** (Head, Access Services, University of Calgary Library, Calgary, Alberta, Canada; Phone: 403-220-6043) <tiessen@ucalgary.ca>

The University of Calgary has used CISTI Source as an unmediated document delivery service since 1998. CISTI (Canada Institute for Scientific and Technical Information) essentially functions as Canada's national science library. CISTI's role as a source for scientific, technical and medical information both in Canada and internationally has been well documented.

What is CISTI Source?

From the CISTI Source Website: "CISTI Source is an integrated current awareness and document ordering service. It is made up of two distinct but inter-related parts: its databases (CISTI Source Articles, CISTI Source Journals and the CISTI Catalogue) and its alert services (Article Alert and Journal Contents Alert)."

The CISTI Source Articles database indexes articles from 17,000 different journals worldwide in all subject areas. Most of the titles are scholarly in nature, though some popular magazines are indexed as well. Indexing coverage is from 1993 onward.

As of November 9, 2003, CISTI held 9,397 of the 17,000 journal titles indexed in CISTI Source. While the CISTI Source indexing covers social sciences and humanities journals in addition to scientific, technical and medical (STM) journals, the journals that CISTI holds are predominantly STM journals.

At present, the McGill University Library is the only other library to document its experiences with CISTI Source. A primary difference in implementation is that McGill distributes accounts and passwords to a number of departments whereas the University of Calgary uses IP recognition and a proxy server to authenticate users.

How do University of Calgary users access CISTI Source?

Because of the costs involved, we authenticate all users (students, faculty, staff) both on and off campus through our proxy server. Due to our combination of IP recognition and the proxy server, we have not implemented some of the services that come with password access to CISTI Source. This includes CISTI Source's Table of Contents Alerts.

Once a user is authenticated, there are several ways to search the CISTI Source database. Options include searching for the tables of contents of journals; searching the article database by author, title or key-

word; or searching the CISTI Catalogue for all of CISTI's holdings. While our users use all the search options, we usually instruct our users to find references to STM articles in other indexes and then search CISTI Source by the Table of Contents.

After our users find an article that interests them, they are presented with three options:

- If the Library does not own the journal and CISTI can provide the article, an order form allowing the user to request the article appears.
- If the Library owns the journal, a statement appears indicating that the journal is held by the University of Calgary Library.
- If neither the Library or CISTI can provide the article, a button to request the article through our regular Interlibrary Loan service appears.

Users can choose one of two pick up locations for articles. Additionally graduate students, faculty and staff can choose to receive articles by campus mail. Users are advised to pick up CISTI Source requests after 48 hours. Frequently articles arrive the same day that they are ordered. Users are only notified if CISTI has to cancel the request for some reason.

It is also important to note that we do not charge our users for interlibrary loan, regardless of whether it is our regular service or CISTI Source.

Why did we start using CISTI?

From 1992 through 1996, the University of Calgary's collection budget dropped in inflation weighted dollars. The result was a series of heavy cuts to our serials holdings. Consequently, our credibility dropped with faculty and students. In the late 90's with an improving collections budget, we were looking for ways to better manage our collections and to restore credibility with our users.

In 1997 using funding from the Webster Foundation, the library held a five week trial of CISTI Source (or SwetScan/CISTI Service as it was known at the time). The trial was open to graduate students and faculty from the Faculty of Science. 62 people used the service during the Summer of 1997, ordering 1357 articles of which 871 were from journals not held by the University of Calgary Library. There was no blocking of journal titles during the trial. Based on the results of this trial, the library implemented CISTI Source for all students, faculty and staff in May 1998.

Statistics about CISTI Source

Year	MacKimmie (Main) Library Requests Filled	Health Sciences Library Requests Filled	Total CISTI Source Requests Filled	Percentage of Total ILL Requests Filled
1998/1999	3,996	2,114	6,110	16.7%
1999/2000	6,644	3,843	10,487	21.6%
2000/2001	9,739	5,227	14,966	26.4%
2001/2002	8,778	5,530	14,308	25.5%
2002/2003	8,520	5,274	13,794	25.8%

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The statistics above only count user-initiated requests filled through **CISTI Source**. Additional requests made through our regular interlibrary loan service and then processed by our Document Delivery Services staff are also filled by **CISTI**.

A study was completed in 1999, analyzing twelve months of article requests from **CISTI**. The data included both user-initiated requests

through **CISTI Source** and articles requested via traditional interlibrary loan. For the 12 month period from May 1998 until April 1999, 12,413 requests were filled by **CISTI**. These requests came from 2,949 different journal titles. 44% of the titles received only one request and only 8% of the titles received ten or more requests. At that point, we were paying a negotiated rate of \$6.54 per filled request. This data clearly supports using **CISTI** as a cost effective alternative for less used titles and even for heavily used titles.

veloped by **COPUL** (the **Council of Prairie and Pacific University Libraries**), a Western Canadian university library consortium.

In 2003, the **University of Calgary** began implementation of **SFX** as a linking solution. We still use **GODOT** with **CISTI Source**, but hope to start testing **CISTI Source** as a source for **SFX** in 2004. With **CISTI Source** as an **SFX** source, we hope that it will be easier for users to find our electronic and print holdings and avoid some of the limitations we have had in using the **Custom Holdings File** fully.

After we implement **CISTI Source** as an **SFX** source, we also want to test **CISTI Document Delivery** as an **SFX** target. In the long run if **CISTI Document Delivery** works well as an **SFX** target, we may want to rethink using **CISTI Source**. Why should users go through **CISTI Source** to request an article, when they could identify an item in the appropriate index and then use **SFX** to request it directly from **CISTI** without looking it up a second time in **CISTI Source**?

In conclusion, **CISTI Source** has been a very successful service for us. After cut backs in the mid 90's, **CISTI Source** helped us implement a hybrid model between ownership and access. Knowing that our users can easily access an extensive collection of STM journals through **CISTI Source** helps us make wise collection decisions. In the last three years for

which we have full statistics, approximately one quarter of our entire filled interlibrary loan requests have been user-initiated through **CISTI Source**. This speaks to the broad acceptance of **CISTI Source** by our users, particularly in the faculties of Science, Engineering, Medicine and Nursing. In the future our use of **SFX** may alter the way

users request items from **CISTI**, but we expect that we will still be making heavy use of **CISTI's** broad collection of STM journals and quick turnaround time.



In 1998, the local holdings file consisted of a listing of periodicals by ISSN, which we wanted blocked. Now the local holdings file has the ability to not only block by ISSN, but by year and/or volume number. This allows libraries to tailor their blocking to match their holdings much more closely. Unfortunately we haven't been able to extract the holdings from our **Sirsi Catalog** in the format that **CISTI** needs for the local holdings file. At the present time, the benefits of this extra customizing have not warranted the staff intervention needed to create such a file.

Our latest challenge has been integrating our electronic journals with our print journals in the local holdings file. As with most other libraries, we now have a hybrid collection of print and electronic journals. Most of our cataloguing for our electronic journals has been outsourced to **Serials Solutions**. Many of our journal titles now have more than one catalogue record: one record for print and microform holdings, and another with electronic holdings. In a single **Serials Solutions** cataloguing record, there might be holdings from more than one aggregator with different years of coverage. Combining these holdings into one holdings statement would be difficult without significant staff intervention. In addition, we would not necessarily want to block our users from requesting articles from titles provided for example from **JSTOR**, because of their moving wall of coverage. Our challenge in extracting holdings information to block by volume or year and not just by ISSN seems to multiply with our electronic holdings.

GODOT and SFX

When users find an item indexed in **CISTI Source** that neither the Library or **CISTI** can provide, an order button pops up that allows users to order the item from **GODOT**. **GODOT** is document delivery requesting software de-

Cost per use of the five most Frequently Requested Titles from the 1999 study.

Title	Requests	Cost per use based on a Subscription
Current Opinion in Biotechnology	73	\$20.00
Molecular Ecology	68	\$45.00
International Journal of Eating Disorders	68	\$21.00
Journal of Traumatic Stress	66	\$7.00
Applied Catalysis	64	\$138.00

It is important in looking at our statistics to point out one major difference in interlibrary loan between Canadian and American libraries. There is no Canadian equivalent to the **CONTU Guidelines** (Rule of Five), which requires the payment of copyright royalties when it appears that interlibrary loan is substituting for a subscription to a periodical. Instead of paying copyright royalties if we extensively borrow certain titles from **CISTI**, Canadian universities are required to pay annual blanket copyright licences based on FTE count.

Configuration and Costs

We have set a price limit of \$10.00 per request. The limit is set to preclude users from borrowing books or making rush requests. We especially didn't want our users to borrow books, since we weren't sure how we would track requests that went straight to **CISTI**.

In 2001, **CISTI Source's** help and contact Web pages became customizable. Our contact information refers users to the appropriate staff members in the **University of Calgary Library System**. The help pages were left largely as they are, but we deleted sections that referred to services such as the **Table of Contents alerts** that we do not provide.

CISTI currently charges C\$10 per article for Canadian Libraries and USD\$10 for U.S and International libraries for **Direct Service**. Articles requested via **Direct Service** are ordered electronically and delivered by **Ariel, Secure Desktop Delivery** or fax. Delivery time is within two business days. Volume discounts of up to 20% are available for libraries that order 10,000 or more copies per year.

Blocking for Local Holdings

CISTI allows the creation of a local holdings file, which blocks users from ordering journals owned by their institution's library. The initial charge for setting up a local holdings file is \$2,000 and a single update is \$200. We typically update our file once a year. This has been a valuable feature for us.

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