NCIP Implementers Group
Minutes - In Person Meeting
April 27-29, 2010

Present:

Voting Members
Sue Boettcher - 3M
Mary Jackson - Auto-Graphics
Susan Campbell - College Center for Library Automation (CCLA)
Rob Walsh - EnvisionWare (NCIP Maintenance Agency)
Mike Dicus - Ex Libris
Eric Leckbee - Innovative Interfaces
Tony O'Brien - OCLC
Dan Iddings - PALCI
John Barr - Polaris
Rob Gray - Polaris
Kevin Stewart - Relais International
Gail Wanner - SirsiDynix (Chair)
Thalia Dickson - TLC

Observers
Karen Wetzel - NISO (Tuesday, Wednesday only)
Dhaval Kotecha - RapidRadio (Wednesday only, participated from India via conference call)
Jennifer Bowen - Rochester University / eXtensible Catalog Project (Wednesday only)
Randy Cook - Rochester University / eXtensible Catalog Project (Wednesday only)

Minutes prepared and submitted by:

Rob Walsh, EnvisionWare / NCIP Maintenance Agency

Editor’s Note: In some situations, the record of the conversations was reorganized slightly from the way those conversations occurred chronologically in order to keep related information together. Efforts have been made to ensure that that the reorganization does not affect the meaning or the context of the discussions.
# Table of Contents

Welcome and Introductions 4  
Review of 2009 Goals 4  
Review of Core Messages 8  
Implementation Updates 9  
Self-Service and NCIP 10  
Core Messages 11  
Recall Item 15  
Implementer Registry 15  
Continuous Maintenance 16  
Taking NCIP to ISO 16  
ALA Social Hour 16  
Presentation by RapidRadio 17  
Presentation by the eXtensible Catalog Project 17  
Change Requests Review 19  
Repeating the Bibliographic Id and Item Id in Request Item 30  
Review of Action Items 31  
Open Test Bed 31  
2010 Goals 32  
Technical Support for Implementers 33  
Encouraging Implementation of Version 2 33
Planning for the Next Meeting
Conference Call Times and Technologies
Next Conference Call
Adjournment
Appendix A - Presentation by Dhaval Kotecha, RapidRadio
Appendix B - Handouts from eXtensible Catalog Project
Appendix C - Action Items
Welcome and Introductions

Wanner began the meeting with a quick round of introductions. Innovative Interfaces, Polaris, and TLC were each represented by someone attending his or her first NCIP Implementers Group (NCIP IG) meeting. Wanner also thanked Gray and Polaris for serving as the host organization for the meeting and for making the various logistical arrangements.

Review of 2009 Goals

Wanner then reviewed an email she had previously sent to the Implementer Group list serve outlining the group’s goals for 2009 and the progress that had been made for each.

* Formal requirements for membership in the Implementers Group

At a previous meeting (April 2009), the NCIP IG agreed to abide by the NISO Guidelines for committee membership (as outlined in the NISO Policies and Procedures Guide, http://www.niso.org/about/documents/NISOprocedures2008final.pdf). Over the course of the past year, the NCIP IG has removed some organizations from the roster for failing to meet the participation requirements. Wanner explained that there is no intent to become overly formal, but we do need some way to ensure that we know who is participating. Of those on the current roster, only VTLS is not actively participating. Wanner, Walsh, and Wetzel will coordinate to contact VTLS to determine if they wish to continue their participation and are willing to commit to the membership requirements.

Additionally, there has been interest from several entities who wish to be involved with the NCIP IG, at least as observers. RapidRadio in India has participated in a few recent phone calls and is planning to give a web presentation to the group on Wednesday. The eXtensible Catalog Project also has participated in past calls and will be present on Wednesday to talk about their progress. Finally, Mick Fortune, a consultant in the UK has been in contact with both Wanner and Walsh asking about how NCIP might be used to interoperate with RFID applications.

Gray asked if new members are required to pay NISO membership fees. Walsh answered that NISO membership is not required for NCIP IG (or other NISO working group) participation.

Wanner asked if anyone had any issues or problems with continuing to abide by the NISO Guidelines for membership. No one present voiced an objection.
* Continuous Maintenance

Walsh provided a basic summary of Continuous Maintenance and the procedures approved by ANSI (http://www.niso.org/workrooms/ncip/continuous). He explained that there is some confusion within the group about what sorts of changes are allowed under Continuous Maintenance. An agenda item exists for further discussion later in the meeting.

* Encourage Implementation of NCIP

  * Define core set of messages and responses

  At the September 2009 meeting, there was discussion about whether Recall Item truly belongs in the Core Message Set. Additionally, there was suggestions that the Core should be pared down even further - from 9 to 4 or 5 since most self-service applications need fewer messages than resource sharing applications do. Finally, the previous discussion included how we define compliance against the Core. Does an application comply only if it implements all 9 messages, or is some level of partial support allowed.

  Campbell asked how an application’s role affects compliance. “Is is possible for an application to be compliant as an initiator?” Wanner added that an ILS with no ILL capabilities would always be a responder. “We need to be clear when an application is playing only a single role,” she continued. “We should focus compliance on Core Messages rather than on the application’s context (DCB3, Self Service Circulation, etc.).”

  * Promote adoption of Version 2

  Wanner reminded the group that NISO feels strongly that implementations should be moving to Version 2. At this time, little progress has been made. We are becoming aware of new implementers, like RapidRadio in India, who are using Version 2. Likewise, some existing implementers are beginning to add support for Version 2. Some implementers are struggling to find a solid business case to justify the additional development investment to add support for Version 2. However, as we see more Version 2 implementations, implementers will have more reason to support both, especially for initiators.

  * Create educational documents for implementers

  Wanner summarized that, while we have created tasks for preparing these documents, we struggle to get them done. She hopes to have time during this meeting to break into working groups to make some progress on this material.

  * Outreach programs to potential implementers
Again, Wanner stated that, although we have discussed various ideas, we have struggled to do anything significant in this area.

* Encourage global dialog with implementers

Wanner said that, in this area, we have had some success. We have seen interest from India and from some parts of Europe. However, we’re also seeing some resistance internationally to adopting a NISO Standard (rather than an ISO Standard). NISO is seen to be a US-centric body. At times in our past, we have discussed seeking ISO standardization for NCIP. It has always seemed like a daunting task, but it is something we could reconsider. Presently, there is no international analog to NCIP, and that may indicate that the level of interoperability between international systems is low.

Iddings suggested that ISO standardization might be something we should consider when we reach a point where we are ready to draft Version 3. Wanner added that we could use that as an opportunity to clean up the existing version by removing unneeded messages and reviewing the various data elements available in each message. O’Brien suggested that we could consider a means for exchanging policy information.

Walsh asked how we deal effectively with international logistics. “Europe is 4-5 hours off of US Eastern time, but India, China, and Australia are closer to 12. Would we be able to hold participants in those regions to our membership standards?” Boettcher suggested that we could use video conferencing and schedule conference calls for 8 am or 8 pm US Eastern time. Wanner added that Wednesday’s presentation by RapidRadio in India will serve as a test case for using remote technology to facilitate international participation.

* Educate the library community about NCIP

* Revise NISO RFP document section on NCIP

We have discussed revising NISO’s RFP Guidelines to help explain to libraries how they should be requesting NCIP, but no progress has yet been made.

* Create an implementers registry to track the use of messages

We have plans to create an implementer registry to track the use of messages in each vendor’s applications, and we have created forms for initiators and responders to fill out, but we’re not sure how to deliver the information. Also, we need to determine how the Core Messages relate to the implementer registry to best show, in a way that libraries will understand, how applications interoperate.

* Create documentation to explain NCIP to librarians
Wanner acknowledged that this has been a real challenge. “It is difficult to explain NCIP,” she said. “There are lots of messages, but not are all necessary in a given application. We use specific terminology (like DCB3) that many do not understand, but there is no single context or purpose.” In the past, we have discussed creating documentation that will explain NCIP to librarians. It should talk about how NCIP works, and it should include information about how to explain it to the information technology (IT) people in the library.

* Outreach programs, presentations, and activities

Wanner stated that we have been a regular participant in the LLAMA-SASS/RUSA STARS panels at ALA. Wanner agreed to follow up with those groups about participating again this summer. Also, we have given presentations at LITA conferences. The most recent, though, did not seem to be particularly effective. Attendance was low, and those who did attend seemed to have higher levels of current knowledge and awareness than at previous conferences. We held a social event at ALA annual in 2009, but it was poorly attended. We are planning another for this year’s ALA in Washington, D.C., and we hope to do more to let people know about it.

Wanner asked if anyone had other goals or ideas about additional ways to reach the library industry. Gray stated that whatever momentum we seem to gain in the industry ultimately stalls due to situations outside our control -- 9/11, a down economy, etc. The library market wants to see NCIP succeed. They want standards, not one-off web services. “If we had a big widespread use of the Standard in some region,” he continued, “that would encourage more awareness and adoption. We seem to have very low inertia right now.”

Wanner added that libraries are faced with low budgets. Even though NCIP could save them money, they don’t have enough money to get started. Jackson said that, at a recent presentation she gave in Connecticut, people expressed surprise about how low the vendor adoption rate is. “Libraries expect it to be ‘plug-and-play’ at this point in it evolution.” Wanner mentioned that testing has been so daunting that those who have implemented have done only what is necessary. “Further,” she continued, “many of us are not in a position to dictate what our companies do.”

Barr reported that Polaris has had some success when they are able to find a local champion in a library. That person can explain what the library wants, and he or she is then available to help. Jackson said that she tried to convey that same message during her presentation. Barr added that customers have some of the same challenges as vendors - no time, no money, and too many other projects. Wanner asked how we get libraries to step up and accept the challenge of being the champion. Barr responded by saying that we need to find the libraries that are in the best position to do it. Those generally are the larger libraries or consortiums to have adequate resources. Iddings agreed that has worked at PALCI. “However,” he said, “it took five years to get enough libraries to commit to work with Innovative Interfaces to have NCIP added.” Boettcher
asked if we could emphasize the savings associated with implementing NCIP. Wanner mentioned a time and motion studied conducted by a group in Minnesota that showed significant savings. Jackson added that one of her customers recently updated a study showing that 75% of the staff time allocated to ILL had been freed up for other purposes due to NCIP.

Iddings stated that, while there has been a demand for applications that NCIP could support, some vendors have found others ways to implement. Wanner added that developers still feel that alternatives to NCIP (like web services and SIP) are easier to implement. O’Brien said that the actual effort, however, to implement NCIP would have been an order of magnitude less that the alternative (telnet screen scraping, for example) that was used in situations where NCIP was not an option (for non-technical reasons). “Commercial considerations,” he continued, “generally override the desire to be standards based.” Wanner asked if that can be solved. O’Brien said that we can look to identify situations that are conducive to NCIP and focus on those. That might provide a groundswell of activity on which to build. Campbell mentioned that NCIP should be something that a vendor could use as a competitive advantage. “Having NCIP should be more valuable and make vendors more competitive than not having it,” she said.

Iddings noted that operations that use NCIP probably account for only about 2% of the total functionality available within an ILS. “That isn’t enough to compel its use,” he said. “The customer’s drive should be for an application that uses NCIP to achieve its goals rather than for an NCIP implementation.” Walsh added that the customer’s expectation is to buy a solution comprised of components from multiple vendors and have them plug in and work together. “The ‘how’ is unimportant,” he said, “but NCIP provides a common platform that promises seamless interoperability.” Campbell said that she liked the idea of focusing on applications. “NCIP might make implementations less difficult,” she said, “but it should not be necessary for libraries to understand the intricate details.”

Review of Core Messages

Campbell’s comment provided a segue into a discussion centered on the Core Messages. Wanner suggested that we might have a common core composed of four messages, then an ILL core containing another 5 and a self-service core with others. Gray noted that self-service might be better termed circulation since the messages that would likely be included might be used for more than self-service. Leckbee said that his preference would be for a circulation core in addition to a self-service core. “They have different requirements,” he added. Wanner observed that we may be talking about multiple cores that act like profiles. “However,” she continued, “we probably don’t want to use the term ‘profile’.” Gray noted that we often use terms like “CIRC,” “ILL,” “RPA,” etc., to communicate with other vendors about what we need them to support.
Implementation Updates

After a brief break, the group listened as each member presented implementation status updates.

* Auto-Graphics is now in production with TLC’s Library.Solution. They have experienced some difficulty communicating with people at SirsiDynix, and this highlights an issue inherent with interoperability testing. Auto-Graphics’ implementations are against Version 1. They have no timeline for implementing Version 2.

* SirsiDynix has finished testing with CARL and is working on testing with TLC. They, too, are using Version 1 and have no schedule for Version 2 (because they have no strong business case).

* Innovative Interfaces has finished coding for the Michigan project and is waiting on other vendors to test and confirm. This implementation is using Version 1. They are working on a Version 2 implementation with Relais for PALCI, and they expect for this to be ready for testing in the third quarter of this year.

* Relais International is working with Innovative Interfaces. Also, they have tested against the latest version of Voyager from Ex Libris. They, too, are experiencing some struggles communicating with people at SirsiDynix. Relais is supporting both Version 1 and Version 2.

* 3M is still supporting Version 1 and waiting on additional vendors. They had one implementation in the US and another in the Czech Republic, but both have returned to SIP because they were unable to use Lookup User to obtain sufficient information about user privileges.

* OCLC is supporting Version 1.01 in WorldCat Navigator as an initiator. They have tested with several vendors (including SirsiDynix and Ex Libris), and they are willing to test with any responders. They are currently testing a Version 2 toolkit, but they are unsure as to when it will be ready for production. It works as a service layer, and it will work in parallel with other available interoperability mechanisms.

* PALCI is in the process of implementing Relais. They are expecting to go live on August 20, 2010, with NCIP in as many places as possible. They will support Voyager (using both NCIP and SIP), TLC (using NCIP), and Innovative Interfaces (using telnet until Innovative Interfaces’ support for NCIP is complete). Their implementations will be a mix of Versions 1 and 2.

* CCLA reports that the Florida legislature is looking for more ways to interoperate among colleges, universities, K12, and public libraries. NCIP seems like it should be a natural fit.

* Ex Libris has done recent testing between Relais and Voyager using Version 1. They found a few areas that need to be enhanced.

* TLC has implemented Version 1 with SirsiDynix.

* Polaris has a test bed that is always available. Not much has changed since the last meeting. They will begin working on Version 2 as other vendors want support for those messages. In the meantime, both Versions 1 and 1.01 will be available.
EnvisionWare has nothing to report as they have not found a sufficient business case to implement NCIP.

Self-Service and NCIP

Wanner asked whether self-service belongs inside NCIP. Jackson said it might be easier to answer after hearing more about 3M’s plans for SIP 3.0. Boettcher indicated that NCIP started with self-service as a core piece and added ILL and other functions. “Today, though,” she continued, “NCIP makes sense for ILL, but not enough have implemented the appropriate support for self-service. I think that it will get there eventually.” Walsh asked how many vendors support the various NCIP messages for fiscal transactions. Most, though, support SIP’s 37/38 fee paid messages. “Basic self-service circulation stations,” he continued, “need Lookup User, Lookup Item, Check Out Item, Check In Item, and Renew Item. However, that’s where the industry was 6-7 years ago. Today, we need messages that are not part of the Core Message Set, and those don’t overlap with the messages needed for ILL.”

O’Brien noted that we often start with the messages rather than the services. “If we started with wire frame diagrams to show what functionality is expected,” he said, “then we could determine what messages are required on the backend. These might help us better communicate, both amongst ourselves and with libraries.” Wanner agreed, saying that we may have skipped a step. “We assume that we all understand the requirements. However, we seem to have identified three potential message cores: Patron Services, ILL, and Circulation.” Iddings suggested that we might consider adding a Discovery-to-Delivery core.

O’Brien suggested that we should review what “circ-to-circ direct” looks like and attempt to see how it differs from DCB. “That might lead to a more consistent view of the interactions that can then be applied to the more general case of DCB,” he said. Jackson expressed a concern with the approach. “I would worry,” she said, “that, while interesting as a theoretical discussion, we may not have a true business case.” Iddings said we should talk to the people at the eXtensible Catalog (XC) project to see if they have envisioned circ-to-circ connections or if they expect to have a middle component. Wanner indicated that there focus thus far has been to talk to their own system.

O’Brien added that we should consider, too, some of the details associated with an intelligent client talking to a server (particularly for self-service and as opposed to server to server). “We think about a user checking out,” he said. “Perhaps they owe a fine and pay it. However, there are more details like whether the user can browse a list of fine items owed and individually select them. Starting with a hypothetical user interface showing the user’s perspective might make it possible to more clearly differentiate self-service from DCB or ILL.”
Core Messages

Wanner asked the group to continue the discussion of Core Messages. “We’ve talked about dividing them by application context and addressing Circulation, Patron Services, and ILL,” she said. “We’ve also talked about approach the messages as either Client/Server or System-to-System.” The group decided to first consider a circulation core by focusing on functions rather than messages. It created the following list of tasks that might be performed by a circulation system.

* Circulation
  * Check In
  * Check Out
  * Patron Identification
  * Patron Verification
  * Renew
  * Holds
  * Reserves
  * Item Availability
  * Fines and Fees
  * Overdues
  * Notification for Overdues, Hold Pickup, etc.
  * Patron CRUD (Create, Update, and Delete)
  * Inventory Control (Item CRUD)
  * Item Identification
  * Blocks and Traps

The group then did the same for Patron Services.

* Patron Services
  * Patron Identification
  * Patron Verification
  * Blocks and Traps
  * Single Sign On
  * Holds
  * Reserves
  * Home Delivery
  * Fines and Fees
  * Patron CRUD (possibly without Delete)
  * Recall
  * Download / Create (eResources)
  * Item Expiration / Delete (eResources)
  * Usage History and Reporting

Finally, the group addressed ILL.
* Inter-Library Loan
  * Request (may be synonymous with Holds)
  * Manage Temporary Resources
    * Items
    * Patrons
  * Fines and Fees
  * Overdues
  * Recalls
  * Notifications
  * Patron Identification
  * Patron Verification
  * Item Identification
  * Check Out
  * Check In
  * Ship / Receive Item
  * Download / Create (eResources)
  * Renew

The group observed that there appeared to be much overlap among the items on the three lists. O’Brien, though, noted that things that are named similarly in different lists may be handled subtly but significantly differently.

Wanner asked if we need a separate category for DCB or if the core functions would be the same even if the underlying steps are different. Gray stated that he thinks of ILL as lending an item to another institution. “In that context,” he continued, “it doesn’t matter to me what patron or item the other institution uses. I know that eventually I will get the item back.” O’Brien said that he views DCB and separate from ILL. “There are differences in the functions each supports at the conceptual level. When you include the patron, DCB offers a richer set of functionality than ILL.” He cited “pick up anywhere” as a concept that might require one system to copy patron records from another. Jackson said that ILL can also allow a patron to pick up an item anywhere. O’Brien clarified that ILL defines a relationship between two libraries and no patron is involved. In DCB, the relationship is between a remote library and a local patron. DCB allows patrons to perform functions in another library’s system. Wanner said that underneath the functions are similar. “The difference is in who performs them,” she added. “It may be a matter of policy.”

Walsh said that we appear to have created the same list three times. “I imagined a narrower view of circulation,” he continued. “Patron Services might include much of Circulation, but it would add other functions. ILL would include Circulation, too, and it would add its own functions which would be different than those added for Patron Services.” Wanner suggested that we might consider trying to define the more narrowly focused lists. Jackson, though, said that if we remove holds and overdues (for example) from Circulation, then people look at the Circulation list and say, “You don’t do circulation because you don’t do overdues and holds.” Wanner said she would make that statement the other way. “I do circulation plus ILL.” Barr suggested that instead of
attempting to define 3 or 4 narrowly focused lists, we could create lists that build on each other. O’Brien expressed support for the idea so long as we are able to create overlapping concentric circles rather than Venn diagrams. Gray and Jackson somewhat simultaneously suggested that the proper separations might be “managing the user (Patron),” “managing the items (Circulation),” and “managing my relationship with another institution (Resource Sharing).”

Iddings observed that we have not yet begun to address the cases where the item is not known. These cases all assume we have a known item. O’Brien explained that NCIP is all about having a known item and a known patron. “It isn’t defined to deal with discovery to handle the special cases where the item is unknown,” he said. Jackson asked if that is something we should address as we prepare documentation. Wanner agreed that it might be good to add information explaining that NCIP assume that the item and the patron are known.

O’Brien asked what would happen if we assumed that Circulation, ILL, and DCB are all the same and that anything can be a patron. Perhaps then we could have concentric circles representing levels of minimum functionality. Level 1 might be Check Out, Check In, ad Lookup User. Level 2 would represent additional functionality. Walsh indicated that it might not take long, though, before we find the need to branch. For example, some applications might need fiscal transactions while others don’t. Any functionality that is defined in a level beyond that which contains fiscal transactions is unavailable to any application that does not need fiscal transactions.

Stewart noted that when we originally defined the Core Message Set, the focus was on simplifying. “It seems now like we’re making things more complex,” he said. “If the Core has too many messages, we should see if some can be removed.” Jackson offered that the problem with the Core is that not everyone supports the whole Core. Stewart suggested that, in cases where the vendor is missing only one or two messages, it should just implement them. Alternatively, we could redefine the core to remove those considered to be extraneous. Iddings said that from his users’ perspectives, everything in the Core is necessary. Wetzel suggested that we might need to collect more user feedback on what messages and functions are truly necessary.

The group decided to compare the current Core Message Set to SIP.

* Core Message Set
  * Lookup User
  * Lookup Item
  * Request Item
  * Cancel Request Item
  * Accept Item
  * Check Out
  * Check In
  * Renew Item
* Recall Item

* SIP (NCIP messages to perform tasks possible with SIP)
  * Lookup User
  * Lookup Item
  * Check Out Item
  * Undo Check Out Item
  * Check In Item
  * Create User Fiscal Transaction
  * Renew Item
  * Update User (limited availability in SIP; currently used to block a user)
  * Create User (not available in SIP but needed)

Campbell said that this still does not address the issue of whether an application is a responder or an initiator. If two vendors have only responders, then I cannot implement. The circ-to-circ piece is missing. Jackson added that sometimes the messages define a given workflow. For example, the item in an ILL transaction must be returned to a specific location. O’Brien noted that vendors will need to be clear about what roles they play in given contexts. Wanner said that while we don’t disagree philosophically with the idea of circ-to-circ. “However,” she continued, “if that is required for Core Message compliance, then the fact is that no systems will be compliant.” Campbell reiterated that we need to stress the importance to be clear about the role. Wanner asked if compliance is required only for a responder or if it is equally valid for an initiator. O’Brien suggested it makes sense only for a responder. Walsh suggested that it should be possible for an initiator to be compliant if it makes sense in the specific context associated with the application. O’Brien also noted that initiators may need to be careful about implementing messages beyond the core since compliant responders are not guaranteed to respond.

Wetzel said that NCIP compliance has been (and should remain) a single message. Compliance with the core, though, should be all messages in the Core. O’Brien agreed that we need to pick a label that indicates when an implementer says “I comply” that there can be no misunderstanding. Stewart said that when an initiator claims to support the ILL Core, it should support all of the messages in that Core. Wanner said that it should be acceptable for implementers to say “No, I don’t support all of the messages in the Core because only one is needed for this application.”

Boettcher suggested using the term “Support” rather than the term “Compliant.”

O’Brien suggested a system (using non-sensical animal names as placeholders for real labels that would need to be determined) for claiming full or partial compliance with the Core. Full support would be associated with one label, while partial support would use another. Walsh suggested something like “Full support as an initiator,” “Partial support as a responder,” etc. as labels that we might use.
Wanner asked whether responding to a message with some kind of “Message Not Understood” is sufficient for a responder to claim compliance. Jackson said that since the result would not be that which is desired, this should not indicate compliance.

Ultimately, the group agreed to identify a common Core with extensions for Self-Servvce and other extensions for Resource Sharing. Iddings, Campbell, and Wanner offered to help draft some language describing the Core Message Sets and how an implementer describes its support for them. They hope to complete this task before ALA in June 2009.

Recall Item

Wanner asked if anyone objected to having Recall Item as part of the Core Message Set. Dickson said that it did not appear to be as important as other messages in the Core. Wanner agreed that, in public libraries particularly, the need for Recall Item is probably small. Boettcher asked whether it is truly necessary to do ILL. Walsh recalled that at the September 2009 meeting Campbell suggested defining a public and an academic core. Dickson asked whether recall would become more important to public libraries in the future, and Wanner observed that some consortia have both public and academic members. After some additional discussion, the group agreed that Recall Item should remain in the Core Message Set for Resource Sharing.

Implementer Registry

Wanner noted that we will need to modify the submission forms that have been created for responders and initiators to indicate their support for the Core Message Sets. She asked how we want to capture and display the information. Wetzel showed a system created by the SUSHI working group (<http://sites.google.com/site/sushiserverregistry>). Dickson asked whether the system has support for version control. Wetzel was not sure. She thinks they retain older versions manually.

Campbell asked whether only limited support for data elements undermines compliance. Wanner said that the submission forms should indicate which data elements are required and which are optional. “A compliant system must support all required data elements,” she added. Jackson suggested that the form should group data elements into categories for “Required,” “Optional,” and “If Requested.” Stewart asked if the forms should go to the level of which User Optional Fields are supported. Wanner said that this level of detail was not planned because it seems like too much information for customers. It would, though, be necessary for other implementers.

Wanner, Campbell, and Jackson agreed to revise the existing submission forms and to create analogs for Self-Service before ALA in June 2009.
Continuous Maintenance

Wetzel explained that, even though the Standard may change through Continuous Maintenance, the official version will always be Z39.83-2008. Because the schema was not part of what was balloted, it may change at any time. Jackson presented a hypothetical example where we removed Recall Item from the protocol. “How would an implementer know what ‘version’ has Recall Item and which does not?” she asked. Wetzel said that we can track changes with information version labels. She suggested, too, that we keep a change log. The Standard can change; the Standard’s designator cannot. It would be acceptable, for example, to identify a revision as Z39.83-2008 followed by some sort of revision indicator. To do that, we need to add language to the Standard that defines the versioning structure. O’Brien indicated that changes to the schema require a new label for the schema. That implies a new version (2.0 -> 2.01, for example), and the Standard should somehow reflect that versioning. Walsh summarized the conversation by indicating that we should adopt a versioning scheme beneath the Z39.83-2008, that we should add a preface that describes the versioning process, and that we should keep some kind of change history (perhaps as an Appendix) and/or explanation of the changes from the prior version.

Taking NCIP to ISO

Wanner reopened the discussion about whether we should ask ISO to standardize NCIP. Wetzel said that this would require a proposal to the Discovery-to-Delivery Topic Committee. “The fact that there are no Version 2 implementations,” she added, “would make ISO adoption challenging.” Wanner observed that support is growing, and she asked why we have to distinguish between Version 1 and Version 2 implementations. Wetzel said that ANSI limits us to only the current version. Version 1 is no longer consider “active.” O’Brien said that he understands both sides of the issue. “It may be embarrassing to submit Version 2 because there are so few implementations. At the same time, though, Version 1 is 4-6 years old. It seems that the only real option is to wait for more Version 2 implementations before submitting to ISO.” Wanner agreed with O’Brien.

ALA Social Hour

Wanner explained that the current plan is to meet Sunday afternoon or early evening at some place near the convention center. Wetzel said that it may be challenging to find a place that will handle a group without committing to dinner seating. Wanner indicated that we would like to find a casual but relatively quiet place where we can converse. Iddings suggested that we convene in the lobby bar in the Renaissance Hotel. The group agreed that this would be an appropriate location. Wanner and Jackson agreed to draft an invitation that can be sent to groups like the ILL-DD, Rethinking Resource Sharing, LLAMA-SASS, and RUSA STARS. Given the low turn out at last year’s event, we should not be too concerned about inviting too many people.
Wednesday, April 28

Presentation by RapidRadio

Kotecha gave a presentation (remotely from India) outlining RapidRadio’s journey with NCIP, NCIP awareness in Asian markets, and suggestions for improving the adoption of NCIP. (Kotecha’s presentation is included in Appendix A.)

Walsh agreed to follow up with Kotecha to get the additional information that he indicated he would be willing to provide during the question and answer session that followed his presentation.

Presentation by the eXtensible Catalog Project

Bowen provided a summary of the eXtensible Catalog (XC) Project’s efforts and how it has incorporated NCIP. (Handouts were provided and have been reproduced in Appendix B.) The project has four open source toolkits (available at extensiblecatalog.org) that collectively allow applications to harvest data from the ILS. One toolkit does the actual data harvesting, while another does metadata processing. These do not use NCIP. The third and fourth toolkits are called the Drupal Toolkit and the NCIP Toolkit. The Drupal Toolkit talks to the NCIP Toolkit which gets the information from the ILS. When used together, the four toolkits provide an end-to-end solution. Many libraries use various combinations of the four to do specific tasks. The XC Project works with many libraries to develop the connectors to specific back-end ILS. Currently, they have support for Voyager Classic versions 6 and 7 (developed by the University of Rochester), Aleph version 1.8 (developed by Notre Dame; efforts are underway to migrate to Aleph version 2.0), and Innovative Interfaces running on Oracle. Support for Innovative Interfaces using the non-Oracle database is underway at the University of North Carolina, Charlotte. Cornell has done some work to interoperate with ILLiad and has portions in production. Some of their system uses NCIP. The XC Project hopes to incorporate Cornell’s work into the project soon.

Cook explained the Drupal and NCIP Toolkits in more detail, and he showed their NCIP Test Bed implemented in Drupal. All of their work so far is with NCIP Version 1. He explained that there are some messages in the Core Message Set that are not implemented in the XC. Since they are primarily a discovery tool rather than a transaction processing application, so they have no need to circulate. They are, though, thinking of adding support for Renew. They did add additional verbs to their implementation of NCIP in order to meet specific needs. They added XC Lookup User and XC Get Availability, primarily to meet ILS-DI/DLF requirements. Walsh found the ILS-DI/DLF recommendations on the Internet and explained that GetPatronInfo requires that Contact Information, Fines, Holds, Loans, Recalls, and Messages be available. In NCIP Version 1, some of this information is available via Lookup User. In Version 2, all
but Recalls and Messages should be available, but those could be implemented via extensions.

Cook asked whether Version 2 supports a way to request a range of IDs to generate results set. Wanner explained that we do have a proposal that would allow various item IDs to be repeated in some messages. Wetzel suggested that the XC Project might consider submitting a proposal to address its specific needs. She explained that, under Continuous Maintenance, change requests are reviewed twice per year.

Wanner asked whether ILLiad is supporting NCIP messages directly. Cook indicated that he thinks they are getting the information through some other manner and the Cornell interface is formatting the response in NCIP.

Cook reported on a new code4lib group called ILS Interop that has formed to create a standard mechanism for communicating with ILS backends in order to do discovery. They are considering the use of the XC NCIP Toolkit, but they are also considering Jangle and other options. Bowen added that the goal is to have one approach that is standard for discovery applications to harvest information from the ILS. Cook said that the XC believes that NCIP provides a good approach since it already exists. However, some in the ILS Interop group feel that NCIP is overkill for this project. They cite NCIP’s option to use either structured or unstructured information (for patron names and addresses, for example) as one reason why NCIP is inappropriate. The XC NCIP Toolkit uses unstructured names, but the ILS Interop group wants to use structured data so that the last name is easily identified. Also, some have said that NCIP moves too slowly and does not respond to library needs. The concept of currency, too, is one that seems overly complicated to use.

Wanner indicated that we’ve struggled before with structured versus unstructured data. The NCIP IG is not in a position to dictate whether to use one or the other. She volunteered that we would be happy to open lines of communication with the ILS Interop group, either by participating in their calls or having them participate in ours. However, if John Bodfish of OCLC is part of that group, he is very knowledgeable about NCIP and will represent it well. Cook indicated that the ILS Interop group has calls every two weeks. Bowen added that anyone interested in participating should contact Karen Coombs at OCLC.

Cook mentioned also that the ILS Interop group has discussed using RESTful web services. O’Brien explained that REST is a flavor of web service that uses XML over HTTP POST. When used over HTTP, the NCIP schema may be considered a RESTful service. Wetzel and Stewart agreed to research whether NCIP could be considered RESTful.

Wetzel asked what it would take for the XC Project to migrate to NCIP Version 2. Cook explained that the project is currently understaffed, and it does not have the resources necessary to undertake the migration to Version 2. The current issues list may be a month of work for two developers. At some point, the Project will need to decide
whether to address the existing issues to make the current Version 1 implementation compliant or whether to simply move to Version 2. If the ILS Interop group decides to use NCIP, it will probably want to use Version 2. Wanner offered that we could review the issues list and help determine whether any are already addressed in Version 2. Bowen agreed that the Project might benefit from having someone advise it on what it could gain by moving to Version 2. O’Brien volunteered to provide some guidance, particularly as it relates to the schema. He added that many of the messages and data elements have the same names and structures in Versions 1 and 2.

Cook explained that they XC Project roadmap has most of their efforts going toward the metadata and Drupal Toolkits.

Wetzel asked if there is any value for the XC Project to move from Version 1 to Version 1.01. O’Brien indicated that he did not think any of the 1.01 changes would justify the effort.

Cook asked if anyone has ever requested a “Renew All” function. O’Brien indicated that Renew All could be supported today via iteration. However, this calls into question the stateless nature of the protocol since subsequent requests may expect changes as a result of earlier requests. Bowen asked whether GetAvailability used to get the status on multiple items might have the same potential problem. O’Brien said it may be similar, but NCIP has no support for that function currently. Leckbee added that Renew All also raises the question of partial success or failure. Some items may successfully renew while others do not.

Cook asked if there is a list of people using NCIP. Wanner said that there is a list (http://www.ncip.info/implementer_registry) but it may be dated. Wetzel added that we are working on a more interactive Implementer Registry to provide this information.

Wanner closed the discussion noting that it was valuable. She invited the XC Project to have a representative (or even a rotation of individuals) participate in the NCIP IG.

**Change Requests Review**

Walsh summarized the Continuous Maintenance process and explained that, for each request, the group must decide whether to accept it without modification, accept it with modification, accept it for further study, or reject it. Some discussion of versioning and the challenges associated with changes that involve the schema and changes that involve only the Standard. The group decided that, when viewed collectively, change requests are unlikely to effect only one or the other.
Walsh led a review of the change requests that had been received prior to the March 1, 2010, deadline. He began with those reporting defects against the Standard.

**Number:** 2010-01-0001  
**Type:** Defect  
**Subject:** The optional Ext element is not reflected anywhere in the Standard  
**Description:** The fact that Ext is optional in many elements is not reflected in the Standard.  
**Discussion:** O'Brien noted that the Ext element is, in fact, optional in every message in the protocol.  
**Decision:** Accept without modification. Update the Standard document to show all of the places where the Ext element may be used.

**Number:** 2010-01-0002  
**Type:** Defect  
**Subject:** The optional Institution Header and Response Header are not reflected anywhere in the Standard.  
**Description:** The fact that Initiation Header and Response Header are optional in every message is not reflected anywhere in the Standard. To be correct, they need to be added as optional data in every element in Section 5.  
**Discussion:** None  
**Decision:** Accept without modification. Update the Standard document to show all of the places where Initiation Header and Response Header may be used.

**Number:** 2010-01-0003  
**Type:** Defect  
**Subject:** Accept Item Response “Required Data:” and “Optional Data:” may be misleading.  
**Description:** In Section 5.4.1, Accept Item Response - Required Data: and Optional Data: may misleading. Currently, they read

- Required data: Problem, or Request Id
- Optional data: Item Id

That might lead one to think that the Item Id an be part of the Problem element. However, Item Id is not valid within the Problem element; it is meant to be used only with Request Id.  
**Discussion:** None  
**Decision:** Accept without modification. Update the Standard document to clarify that Item Id is valid only as part of Request Id.
Number: 2010-01-0004
Type: Defect
Subject: User Optional Fields in Item Recall Cancelled is an optional element in the schema but not in the Standard.
Description: In Section 5.5.8, Item Recall Cancelled - User Optional Fields is an optional element in the schema but not in the Standard. Given that in most cases where both User Id and Item Id are valid, it is appropriate to have both Item Optional Fields and User Optional Fields, it would seem that this represents a defect in the Standard and the schema is correct.
Discussion: None
Decision: Accept without modification. Update the Standard document to match the schema.

Number: 2010-01-0005
Type: Defect
Subject: The text of “Required Data:” in Lookup Request Response should be reworded.
Description: In Section 5.3.3, Lookup Request Response - The test of “Required Data:” in the Standard should probably read:

   {Item Id or {Request Id and, optionally Item Id}}

as it does in Section 5.3.2 Lookup Item Response. This reflects the structure of the schema.
Discussion: None
Decision: Accept without modification. Update the Standard document to match the schema.

Number: 2010-01-0006
Type: Defect
Subject: Elements in Lookup Request are repeatable in the schema but not in the Standard.
Description: In Section 5.3.3, Lookup Request - Item Element Type, Request Element Type, and User Element Type are all repeatable in the schema but not in the Standard. It seems that the schema is correct and the Standard needs to be changed to match.
Discussion: None
Decision: Accept without modification. Update the Standard document to match the schema.
<table>
<thead>
<tr>
<th>Number</th>
<th>2010-01-0007</th>
<th>Type:</th>
<th>Defect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject:</td>
<td>Table 2 in Implementation Profile 1 should have space between Public and System Ids</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>In the XML example in Table 2 in Implementation Profile 1, there should be a space between the PUBLIC and SYSTEM ids.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion:</td>
<td>O’Brien found several examples of valid XML on the Internet and all have a space between the PUBLIC and SYSTEM ids.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision:</td>
<td>Accept without modification. Update the Standard document to add a space between the PUBLIC and SYSTEM ids.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>2010-01-0008</th>
<th>Type:</th>
<th>Defect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject:</td>
<td>Table 2 in Implementation Profile 1 gives a URI that does not resolve to the NCIP schema.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>The NCIP schema does not appear to be located at <a href="http://www.niso.org/ncip/v2_0/imp1/xsd/ncip_v2_0.xsd">http://www.niso.org/ncip/v2_0/imp1/xsd/ncip_v2_0.xsd</a>.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion:</td>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision:</td>
<td>Accept without modification. Request that NISO move the schema document to the location specified in Table 2 of Implementation Profile 1.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>2010-01-0009</th>
<th>Type:</th>
<th>Defect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject:</td>
<td>Table 2 in Implementation Profile 1 has the wrong XML version.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>The example is Table 2 in Implementation Profile 1 gives the XML version as “2.0.” This should be “1.0.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion:</td>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision:</td>
<td>Accept without modification. Update the Standard document to fix the XML version number.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number</th>
<th>2010-01-0010</th>
<th>Type:</th>
<th>Defect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject:</td>
<td>User Id is allowed both inside and outside of User Optional Fields; however, Item Id is not allowed inside Item Optional Fields.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>Need to determine which is “correct” and ensure that both are handled consistently.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discussion:</td>
<td>User Id can be used both as an identifier and as data. When used outside of User Optional Fields, it is a key. When used inside, it is simply data.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decision:</td>
<td>Accept for further study. Attempt to find concrete use cases that require Item Id to be used outside of Item Optional Fields.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Number: 2010-01-0011
Type: Defect
Submitted By: Dushyant C. Upadhyay (dushyant@rapidradio.co.in)
Organization: RapidRadio Solutions Pvt. Ltd.
Submitted Date: 25 January 2010
Subject: Table 1 in Implementation Profile 1 has incorrect XML structure.
Description: In Version 2.0, all of the Scheme/Value pair elements were replaced with a simple string value and an optional scheme attribute. In other words, what in Version 1.x was:

\[ <Amount>  
  <CurrencyCode>  
    <Scheme>SomeSchemeURI</Scheme>  
    <Value>SomeValueForCurrencyCode</Value>  
  </CurrencyCode>  
  <MonetaryValue>TheAmountAsAnInteger</MonetaryValue>  
</Amount> \]

would in Version 2 be:

\[ <Amount>  
  <CurrencyCode Scheme="SomeSchemeURI">  
    SomeValueForCurrencyCode  
  </CurrencyCode>  
  <MonetaryValue>TheAmountAsAnInteger</MonetaryValue>  
</Amount> \]

The example in Table 1 in Implementation Profile 1 may be one that was overlooked during the final editing process for Version 2.

Discussion: None
Decision: Accept without modification. Update the example in the Standard document to be correct for Version 2.
Number: 2010-01-0012  
Type: Defect  
Submitted By: Robert Gray ([Robert.Gray@PolarisLibrary.com](mailto:Robert.Gray@PolarisLibrary.com))  
Organization: Polaris Library Systems  
Submitted Date: 27 January 2010  
Subject: The order of the elements in Prompt Input is different in the Standard and the schema.  
Description: The Standard declares the subelements of Prompt Input as Authentication Data Format Type, Authentication Input Type, then Sensitive Data Flag. The schema presents these elements as Authentication Input Type, Authentication Data Format Type, then Sensitive Data Flag (followed by Ext).  
Discussion: Gray explained that the order in the schema may cause some code to be forced to parse the Authentication Input Type element before it knows what format the data is in. O’Brien, though, indicated he did not see a compelling reason to potentially break implementations in order to switch the order of the elements. Since most implementations use generated classes to parse the XML, this should rarely be an issue in practice since the all of the data is put into a class before it becomes available to the application.  
Decision: Accept without modification. Update the Standard document to match the schema.

Number: 2010-01-0013  
Type: Defect  
Submitted By: Robert Gray ([Robert.Gray@PolarisLibrary.com](mailto:Robert.Gray@PolarisLibrary.com))  
Organization: Polaris Library Systems  
Submitted Date: 27 January 2010  
Subject: The order of the elements in Authentication Prompt is different in the Standard and the schema.  
Description: The Standard declares the subelements of Authentication Prompt as Prompt Input and then Prompt Output. The schema presents them in the reverse order.  
Discussion: None  
Decision: Accept without modification. Update the Standard document to match the schema.
Number: 2010-01-0014
Type: Defect
Submitted By: Dushyant C. Upadhyay (dushyant@rapidradio.co.in)
Organization: RapidRadio Pvt. Ltd.
Submitted Date: 22 February 2010
Subject: Loaned Items and Requested Items are named differently in the Standard and the schema.
Description: On page 20 of the Standard (the printed number on the page is 10), the data elements of Lookup User Request have been listed. In the list, “Loaned Items” and “Requested Items” do not match the schema. According to the schema, the element names should be “Loaned Items Desired” and “Requested Items Desired.”
Discussion: The group acknowledged that this was an oversight during final editing for Version 2.
Decision: Accept without modification. Update the Standard document to match the schema.

Number: 2010-01-0015
Type: Enhancement
Submitted By: OCLC
Submitted Date: During Version 2 balloting
Subject: Bibliographic Record Id is not repeatable in Bibliographic Description of Accept Item.
Description: Bibliographic Record Id is not repeatable in Bibliographic Description of Accept Item. It should be possible, for example, for an initiator to send Accept Item using both an OCLC number and an LCCN number.
Discussion: Jackson clarified that the requested change should be generic with respect to the types of ids allowed and not limited to OCLC and LCCN. Gray asked what the responder is accepting. Is it one item with two ids, or is it two separate items. O'Brien explained that, when one is creating a temporary record, one may need multiple ids to represent a single item. “It seems like a fairly non-offensive change that would be generally useful,” he said. Wanner added that it is primarily a resource sharing issue. The lending organization may use one id, but the borrowing organization may use a different one. The common record, then, needs both. Gray asked if this would make Bibliographic Record Id repeatable everywhere it is used. O'Brien indicated that the field is used only to carry information, never to identify an item, so allowing it repeat should not cause any problems.
Decision: Accept without modification. Change the schema to make Bibliographic Record Id repeatable within Bibliographic Description. Then update the Standard document to match the changed schema.
Number: 2010-01-0016
Type: Enhancement
Submitted By: OCLC
Submitted Date: During Version 2 balloting
Subject: Request Item does not allow a combination of Bibliographic Record Id and Item Id.
Description: Request Item does not allow a combination of Bibliographic Record Id and Item Id, and it does not allow either to be repeated. An initiator should be able to send both, and it should be possible to send more than one of each.
Discussion: O’Brien explained that today one must choose to send either an Item Id or a Bibliographic Id but not both. This proposal would allow an initiator to send either or both. Gray asked if that meant the request would be for a specific item or any item that matches the Bibliographic Id. O’Brien said that he did not think that was meant to be the case. It was meant to provide extra information. Wanner asked if it was extra or alternative information. Gray said that his understanding is that an Item Id always represents a single item. A Bibliographic Id would mean any item that matches the given criteria. Stewart noted that the proposal also includes a request that each be made repeatable. O’Brien suggested that we need more information on why this change was requested so that we don’t risk an implementation that is ambiguous.
Decision: Accept for further study. Attempt to find a use case that demonstrates how multiple and repeatable Item Ids and Bibliographic Ids might be used. However, through additional discussion, this decision was changed to “accept without modification.”

Number: 2010-01-0017
Type: Enhancement
Submitted By: OCLC
Submitted Date: During Version 2 balloting
Subject: NCIP is too cautious with respect to element repeatability.
Description: Recent implementation experience has shown that NCIP remains too cautious in the design of its data structures, specifically in the area of element repeatability. The Standard allows for tightening of rules via application profiles (e.g., marking an optional element mandatory), but it does allow permit loosening of rules as would be the case if a non-repeatable element were allowed to repeat. If more elements are allowed to repeat it will also be necessary to specify the semantics. In some cases, it may be obvious how multiple or repeated elements are to be handled. But where the element is part of a key (e.g., Request Item’s Bibliographic and Item Ids), perhaps the semantics are that the initiator thinks any of them is valid, and the responder gets to choose. In these cases the responder ought to return the key chosen in the response.
Discussion: O’Brien indicated that this seems to require open discussion within the group. It may be quite useful, but it may lead to chaotic and ambiguous implementations. Wanner explained that she could see making something like ISBN repeatable since many bibliographic records contain multiple ISBN numbers. Two disparate systems may not have identical bibliographic records. Repeating ISBNs, then, would seem to make sense. Jackson asked if we would also allow elements like...
title and author to repeat so that we could send different titles and different authors.
Gray indicated that would not be relevant since we cannot search on title and author.
Walsh noted, though, that the same example might be valid with ISBNs where two
ISBNs do not represent the same work. That could lead to a confusing implementation.
O’Brien explained that the request is to make every element repeatable and to restrict
them where necessary through profiles. Jackson asked what problem the proposal is
trying to solve. O’Brien said that the problem is philosophical rather than practical. He
presented an example using Accept Item. It contains User Id. Repeating that might
prove to be problematic. Jackson, however, said it could represent a book club.
Stewart asked what it would mean to repeat a Pickup Location. The group
acknowledged that would be a problem. Gray indicated that the excessive repeatability
might significantly increase the overall bulk of the messages. A Check In message with
many items could get pretty big. Walsh observed that if one plan to execute the same
number of check ins with separate messages, the aggregate would probably be less.
Gray said that the response would likely be slower, however.

Decision: Accept for further study. Attempt to find use cases for how it might be used effectively and provide examples to the submitter showing potential problems.

Number: 2010-01-0018
Type: Enhancement
Submitted By: The Library of Congress
Submitted Date: During Version 2 balloting
Subject: There is no way to distinguish individual users from institutional users.
Description: There is no way to distinguish individual users (with personal names, birth dates, etc.) from institutional users (libraries). This has been a shortcoming in our circulation patron data since our ILS was implemented.
Discussion: The group noted that there is nothing that precludes the use of User Id to represent institutions. The “User” in NCIP is the entity requesting an action or information, and patron type, agency, and other data elements could be used to distinguish various types of users.
Decision: Reject

Number: 2010-01-0019
Type: Enhancement
Submitted By: The Library of Congress
Submitted Date: During Version 2 balloting
Subject: It is not possible to represent patrons “owned” by larger patron entities.
Description: NCIP has no facility to allow patrons to be “owned” by larger institutions (e.g., Congressional offices).
Discussion: The group noted that this is a function of the ILS rather than something that should be provided through NCIP. Data elements may be used to provide hints to the ILS as to the true nature of the “patron” identified through the User Id.
Decision: Reject
Number: 2010-01-0020
Type: Enhancement
Submitted By: Brent Jensen (brent.jensen@sirsidynix.com)
Organization: SirsiDynix
Submitted Date: During Version 2 balloting
Subject: Allow the Problem element to repeat
Description: Ensure that the Standard and the schema agree on whether the Problem element is repeatable.
Discussion: None
Decision: Accept without modification. Update the Standard document to match the schema.

Number: 2010-01-0021
Type: Enhancement
Submitted By: Brent Jensen (brent.jensen@sirsidynix.com)
Organization: SirsiDynix
Submitted Date: During Version 2 balloting
Subject: Add “transaction agency” or “transaction location” to Accept Item message.
Description: Add “transaction agency” or “transaction location” to Accept Item message.
Discussion: Wanner explained that Accept Item needs a third agency to represent the pick up location. There may even be a need for a fourth agency representing where the lending agency needs to send the item in order to get it into the borrowing system. Jackson asked if that is simply a function of the borrowing system. Wanner asked how the borrowing system knows where the user wants to pick up the item. Stewart noted that Version 2 has Pickup Location within the Accept Item Response.
Decision: Accept for further study. Ask Jensen whether Pickup Location within Accept Item Response meets his needs or if there are additional use cases.
Number: 2010-01-0022
Type: Enhancement
Submitted By: Brent Jensen (brent.jensen@sirsidynix.com)
Organization: SirsiDynix
Submitted Date: During Version 2 balloting
Subject: Re-review the process for requesting optional information in the Lookup User message.
Description: Towards the end of the Version 2 review process, some changes were made to the way the Lookup User message allows an initiator to request optional information. Some of those changes had to be “undone” during final editing, and the result is an inconsistent and suboptimal approach to requesting optional data. See Loaned Items and Loaned Items Count for examples.
Discussion: O’Brien noted that we should probably revisit the entire approach to requesting optional data. We need a container that can hold all of the things that can be requested, and that set of boolean elements would indicate what I want returned. This would be consistent and much simpler. However, it would break backward compatibility. Walsh said that we’ve discussed, at least informally, that compatibility breaking changes are to be reserved for major revisions (i.e., when moving from Version 2.x to Version 3.0). O’Brien suggested that, according to that rationale, we should not make this change. Stewart acknowledged that while the current approach is message it does not impact the functionality of the system. Wanner agreed that it does not seem like a critical issue.
Decision: Reject. This change would break compatibility without adding any new functionality.

Number: 2010-01-0023
Type: Defect
Submitted By: Rob Walsh
Organization: EnvisionWare
Submitted Date: During review of change requests at this meeting
Subject: Lookup User shows Loaned Items as a required element in the Standard.
Description: Loaned Items should be moved into the list of optional elements in the documentation for Lookup User in the Standard.
Discussion: None
Decision: Accept without modification. Update the Standard document to correct the error.

After a brief break, Wanner asked if we made enough changes to justify a new revision. She reminded the group that it would be required to publish the revision within two months because that is the process that was approved by ANSI. The group agreed that we should publish a 2.01 revision with the accepted changes. O’Brien agreed to make the necessary schema changes, Walsh agreed to update the Standard as appropriate, and Walsh and Wanner agreed to contact those who submitted change requests to let them know the disposition of their proposals.
Repeating the Bibliographic Id and Item Id in Request Item

O’Brien returned to the issue of repeating the Bibliographic Id and Item Id in Request Item. He had been able to communicate with colleagues at OCLC and had some additional information about the proposal. He said the intent of the change request is to be able to place a hold on any copy of any of the ids submitted. Jackson asked whether that would result on a single title. O’Brien indicated that, yes, the request would be for a single title. In other words, no matter how many ids were part of the request, the responder should pick one and place a hold. The user might have found a only a single bibliographic record, but the system could be smart enough to know that other options exist. It could then send all of the various ids that match the user’s request to another system to place a hold. “Systems should be capable of bridging that gap and make appropriate connections to improve customer service,” said O’Brien. Walsh asked if the same effect could be created through iteration. O’Brien said that might result in multiple holds. Jackson said that when the request goes to a particular vendor it should be possible to say, “I know you have multiple versions of this item and I want any one of them.” Walsh added that the potential for misuse is mitigated by having the system fail to do what the abuser hopes it would. For example, if the requesting system wants the responding system to place a hold on ALL matching items, the user will not get what he wants. O’Brien noted that this is a real world problem. “We’ve seen it in practice,” he added.

Wanner expressed a concern that NCIP has limited ability for distinguishing media types. “It may be difficult to restrict the scope to a certain subset of the available formats,” she said. O’Brien said that could be handled by including only the ISBNs for the formats you want. Iddings added that there is a need to say I only want a particular edition, and that should be handled in the application rather than in the protocol.

Wanner asked if anyone objected to the proposal after the additional discussion. Stewart asked if it would break compatibility. O’Brien answered that it would break responders who receive a request with multiple ids and they expect to get only one. Stewart asked whether all changes that affect compatibility should be implemented as extensions. “Changing the structure up to twice each year may upset implementers,” he said. Dickson asked if we want to make this kind of breaking change for a single issue or if we should wait and compile them into a bundle. O’Brien indicated that he could see pros and cons to both approaches. Walsh asked if there are any changes that can be made in the schema that do not cause the same problems. “Even an entirely optional element would choke a responded that does not know it can exist,” he said. Stewart suggested that we might want to limit our updates to less than twice each year. Wanner noted that frequent changes might encourage more people to become active so that their voices could be heard. Dicus observed that many of these proposals have been pending for almost two years. Walsh noted that deciding to do changes only once per year might contradict the process that we’ve had approved by ANSI. Jackson asked how we deal with management when they resist the constant updates, and Gray added that we’ll end up with customers nagging vendors. Wanner suggested that we could
explore what is required to change our process with ANSI. Boettcher suggested that we go ahead with the changes and let vendors pick the appropriate (and hopefully the most current) version to implement when they are ready. Wanner agreed that could work as long as we define compliance against the original Version 2 instead of against each minor revision.

Ultimately, the group decided to change the disposition for proposal 2010-01-0016 from “accept for further study” to “accept without modification.”

Review of Action Items

The group briefly reviewed the various action items that had been assigned over the course of the first two days.

Open Test Bed

The group briefly discussed the notion of an open NCIP test bed that could be used to verify interoperability. In previous discussions on this topic, the group has struggled to come up with a practical way to implement. Someone would need to volunteer to develop a responder (and possibly an initiator) that other vendors could use to exchange messages. Gray noted that this may not be particularly useful in practice. “Validating the XML is the easy part,” he said. “Decisions about whether to use structured or unstructured names or addresses is where the real problems occur.” Walsh agreed that what needs to be tested when verifying interoperability are the outcomes of the messages, not the format and structure of the messages themselves. That is difficult to do with a common and generic system. Leckbee noted also that we would need to have test systems for each version of the Standard.
2010 Goals

Wanner revisited the 2009 goals and asked the group to define goals for 2010. She noted that some of the goals are on-going. “One of the things I would like to do,” she said, “is to ensure that the goals we set are achievable. I would prefer to have fewer goals that we can accomplish rather than many, even if it makes it look like we’re being less ambitious.”

The group decided on the following goals for 2010:

* Support NISO guidelines for membership to ensure a balanced, actively contributing group
  * Improve processes to track and implement formal requirements for attendance and contribution
  * Encourage global participation by implementers outside of North America
  * Seek to add library practitioners as members and observers
* Implement the continuous maintenance model for updating the Standard
  * Clarify conformance for Version 2 and future versions
  * Create, post, and utilize a form for submitting change requests and defects
  * Review and act on requests for change in Spring and Fall meetings
  * Finalize and publish changes with detailed documentation in a timely manner
* Encourage implementation of NCIP through education and outreach
  * Promote adoption of Version 2 by implementers
  * Publish Resource Sharing and Self Service Core Message Sets
  * Publish an Implementer Registry to track support for Core Messages by implementers
  * Create educational documents for librarians and implementers
  * Research other methods to simplify the NCIP learning curve for new implementers
  * Gather and publish NCIP-related case studies and success stories
  * Conduct outreach programs to potential implementers, participants, and observers
Technical Support for Implementers

Walsh asked what we recommend to RapidRadio as a means to get help with implementing. Should we tell them to post a question to the general interest list as has been done in the past? Jackson said that the general interest list has some inherent overhead. Having to join and wait for confirmation might discourage people who are new. Campbell suggested that we create a link on the website where people could submit questions. The questions (and answers) could then be used to create a Frequently Asked Questions (FAQ) list. Wanner agreed that this could help us discover those who are implementing NCIP. Walsh said that it is relatively easy to put a link on the website, but we have to be prepared to respond to the requests. The group decided to defer further discussion on this issue until the next conference call.

Encouraging Implementation of Version 2

Iddings noted that one of the issues that plagues implementers may be the lack of backwards compatibility. “If the vendor community would stop supporting the older versions, people would need to implement Version 2,” he said. “When Innovative Interfaces agreed to move forward with NCIP development [using Version 2], we got a very positive response in the library community.” Campbell added that some states are beginning to mandate statewide interoperability among K-12, colleges, universities, and public libraries. “NCIP needs to be ready to step in and make these systems possible,” she said. Walsh observed that the K-12 vendor community is one that is not represented in this group. Jackson noted that the question often is who will pay for the development. Campbell said that she thinks the states will be willing to pay for the systems, but they need to know what to buy. Walsh suggested that there would need to be a single entity representing a collection of disparate vendors to serve as the analog to the entity representing the customers (the states in Campbell’s scenario). At PALCI, Iddings has played both roles. Wanner agreed that the project needs to be driven by someone.

Planning for the Next Meeting

Dicus reported that Ex Libris is willing to host the next meeting in Chicago. The group tentatively decided to schedule a meeting for September 8-9. The plan is to start at approximately 9 am on Wednesday and break at around 3 pm on Thursday. The group decided to schedule only two days for this meeting since we know the significant burden participating in these committees often places on companies and institutions. Chicago is a desirable venue since it is a central, easy-to-reach location that allows some participants to limit the number of overnight stays required to attend.
Conference Call Times and Technologies

Wanner suggested that we should consider using WebEx or other remote conferencing technologies to help make our conference calls more productive. The group also noted that the standard 1:00 pm US Eastern time for calls is not particularly conducive to people in India. Walsh suggested that we could rotate through a series of time slots over a three or four month period. The group decided to retain the 1:00 pm US Eastern for the monthly conference calls until we can determine whether it prevents or deters global participation.

Next Conference Call

Wanner announced that the next monthly conference call is scheduled for May 20, 2010, at 1:00 pm US Eastern. Call in details are available on the NCIP website (http://www.ncip.info).

Adjournment

Wanner adjourned the meeting.
Appendix A - Presentation by Dhaval Kotecha, RapidRadio

Adding Value to Growth of NCIP
Implementation & Development
NCIP-IG Spring meeting
Wednesday, April 28, 2010

Presented by
Dhaval H K
Managing Director
RapidRadio Solutions Pvt Ltd
INDIA 05/07/2010 www.rapidradio.co.in

Agenda

- RapidRadio implementation journey with NCIP Standard
- NCIP Standard awareness in Asian markets
- Learning, inputs, suggestions to the Standard
- Online web based platform for NCIP Message testing
- Discussion

05/07/2010 www.rapidradio.co.in
RapidRadio implementation journey with NCIP Standard

- First NCIP client (RFID Middleware) based on v1.01 developed during 3Q-2008

- First NCIP client with NCIP v2.0 compliance in 1Q-2009 with SOUL 2.0 (Software developed by INFLIBNET Centre, INDIA)

- Later developed NCIP Server compliant with NCIP v2.0 for various LMS providers in India

- Presently our NCIP Client is working with more than 7 LMS (some of the servers are provided by us)

- Some of them are KOHA, SOUL, AUTOLIB, LIBSOFT etc.

05/07/2010 www.rapidradio.co.in

Standards awareness in Asian markets

- Very few actual implementers

- Wide RFID adoption has just begin which will further result in Standards awareness among vendors

- Till date no discussion on standards implementation is being done in conference & exhibitions to spread awareness among end users (Library Industry)

- Implementations are done in non-standard ways by directly integrating RFID Hardware with LMS

05/07/2010 www.rapidradio.co.in
Learning, inputs, suggestions to the Standard...

- To fix basic Schema for implementation - No options and everything compulsory

- Simulation element – Check transaction result before we execute

- List of Library terms explained in simple English for non library personnel For e.g.: Patron, Accession number, etc.

- A new Message in NCIP Message List – It will tell the implementers the list of messages implemented with a particular server

- A single EMAIL ID for support where people can send their queries and get reply

05/07/2010 www.rapidradio.co.in
- To promote NCIP Certification

Online web based platform for NCIP Message testing

- Online web based platform to test your NCIP message implementation hosted on www.ncip.info

- Basic documentation for implementer to get ready and design a request message

- A server replying with response if the request is correct and in compliance with NCIP Schema

- Report generated with possible corrections incase of failure to receive response

- Above platform will give confidence or way ahead to any implementer going for NCIP standard implementation

- Few screenshots of the host application which we use for our internal testing of messages with local LMS vendors in INDIA
Response received for the Request Send

Discussions
"It is not important how "BIG" you Dream, but it is important how "LONG" you Dream "BIG""

Contact:
dhaval@rapidradio.co.in
+91 9824386160
The XC NCIP Toolkit:
Take Control of the circulation functionality in your ILS

Talking points for NCIP Implementers group

April 28, 2010

XC’s NCIP Toolkit exposes an ILS’s data using the NCIP protocol (version 1.0), allowing real time lookup of patron and item data.

The NCIP Verbs we have implemented are:

- Authenticate User
- Lookup Item
- Lookup User
- Lookup Version
- Request Item
- Recall Item
- Renew Item
- Cancel Request Item
- Cancel Recall Item
- XC Lookup User
- XC Get Availability
- XC Open URL Request Item - partial
- XC Open URL Renew Item - partial

It implements the following requirements of the Digital Library Federation’s ILS Discovery Task Force (ILS-DI) Level 3 recommendation using the corresponding NCIP service:

- LookupPatron (NCIP’s LookupUser)
- AuthenticatePatron (NCIP’s AuthenticateUser)
- GetPatronStatus (NCIP’s LookupUser)
- RenewLoan (NCIP’s RenewItem)
- HoldTitle (NCIP’s RequestItem using a bibliographic ID)
- HoldItem (NCIP’s RequestItem using an item ID)
- CancelHold (NCIP’s CancelRequestItem)
- RecallItem (NCIP’s RecallItem)
- CancelRecall (NCIP’s CancelRecallItem)

In addition we support the following requirements of the ILS-DI recommendation:

www.eXtensibleCatalog.org
The XC NCIP Toolkit:
Take Control of the circulation functionality in your ILS

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- RecallItem (NCIP's RecallItem)
- CancelRecall (NCIP's CancelRecallItem)

In addition we support the following requirements of the ILS-DI recommendation:

www.eXtensibleCatalog.org
Talking points and where we are now

- We have interest in as broad adoption of XC and our component software as possible and that includes our NCIP Toolkit.
  - "This group is intended for discussion and concrete action toward developing an infrastructure for interoperating between integrated library systems and other systems, but primarily discovery layers such as Blacklight, VUFind, Summon, WorldCat Local, SOPAC, Scriblio, and others. This work has been picked up by an interested group in the Code4Lib community."
  - Have some strong interest in using NCIP toolkit as a base for this middleware layer.
  - Some topics of discussion/concern have come up such as the need to be RESTful.
- We have resource issues and can't do everything we need to do. We have recently moved a developer to NCIP (temporarily) to help focus on some open issues. We do not currently have the resources to rewrite NCIP Toolkit for version 2 of the protocol.
- We are taking some steps toward obtaining test sites for Voyager and Aleph for further XC testing and use by the ILS Interop group.
- Have an active issue/bug queue http://code.google.com/p/xnciptoolkit/issues/list and are working on critical items. One fundamental change we are making involves the architecture to separate out the ILS driver releases from the core release.

Want to Better Understand

- Current movement toward adoption of the protocol? Who is using? How are they using it?
  - Future plans?
- Any way to make it easier, such as dealing with currency?
- "Renew all" feature has been requested.
- Plans for RESTful feature?
- Ways to interact with Library community to continue to grow the standard to meet real and current needs (e.g. Interop Group).

www.eXtensibleCatalog.org
NCIP Toolkit

Extensible Catalog is open source, user-centered, next generation software for libraries. It comprises four software components that can be used independently to address a particular need or combined to provide an end-to-end discovery system to connect library users with resources.

XC NCIP Toolkit – Take Control of ILS Circulation Functionality

Unlock the circulation functionality of many popular ILSs in real time. This toolkit provides live circulation status display, circulation forms submission, and ILS authentication for XC and other applications that work alongside your ILS.

Features

- Enables XC’s Drupal discovery interface to communicate with an ILS in real time.
- Adds an NCIP interface to the ILS, which forms the foundation for communicating circulation data with other applications.
- ILS-specific drivers have been created for use with Voyager, Aleph and Ili systems, and this list is growing.
- Java developers can extend the included NCIP feature set to any ILS.
- Meets the Level 3 requirements of the Digital Library Federation’s ILS Discovery Task Force (ILS-D1).
- Fully documented and easily set up by an ILS system administrator - no programming skills required.

For more information:

www.extensiblecatalog.org

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Nancy Frye Foster, XC Principal Investigator
nfoster@library.rochester.edu
585-273-5036

Download at http://code.google.com/p/xnciptoolkit/
The XC NCIP Toolkit: Take Control of the circulation functionality in your ILS

About eXtensible Catalog (XC)

eXtensible Catalog is open source, user-centered discovery software for libraries. XC is comprised of multiple applications, such as the XC OAI Toolkit, which can be used independently to address a particular need, or combined to provide:

- Next generation catalog interfaces on a revolutionary extensible architecture that will adapt to changing user needs over time
- Opportunities to offer innovative new services to end users in order to grow the role of your library within the community it serves
- Ability to easily migrate local customizations into future version upgrades
- Tools that take full advantage of cataloging investments and that leverage existing staff in new ways

About the XC NCIP Toolkit

Your library has made huge financial and staff time investments in your Integrated Library System (ILS). While an ILS addresses many library needs, it usually falls short in areas such as connectivity with other systems and meeting the needs of consortia. Rather than replace your ILS, the XC NCIP Toolkit software works alongside your ILS in real time to extend its capabilities. Now it’s time to “take control” of the circulation system in your ILS!

By using the XC NCIP Toolkit, your library can offer the latest next-generation catalog interfaces while continuing to use the circulation staff clients included with your ILS. Use the free XC NCIP Toolkit software to enable commercial and open source discovery platforms to interface with your ILS patron database for authentication, patron account information, circulation requests, and live circulation status lookups. The XC NCIP Toolkit allows libraries to build custom solutions that tie an ILS into any application in real time! Plus, when the XC NCIP Toolkit is combined with XC’s other Toolkits, XC provides a discovery interface that is highly integrated with an ILS.

Connectivity: The XC NCIP Toolkit can be the foundation that supports your library’s use and development of software applications that work alongside your ILS. When used in conjunction with the eXtensible Catalog’s OAI Toolkit or other tools to automate the export of metadata from your ILS, the XC NCIP Toolkit will allow your next-generation discovery interface to display live circulation status with search results. Our use of the NCIP standard enables your ILS to work with the eXtensible Catalog’s discovery interface in Drupal (XC Drupal Toolkit) or with any other discovery interface that follows the NCIP standard.
Compatibility: When used with an ILS-specific software driver, the XC NCIP Toolkit allows you to add a standard NCIP interface to your ILS. The NCIP Toolkit has been tested with several popular Integrated Library Systems, including Voyager, Aleph, and III. The NCIP Toolkit includes detailed documentation to enable a Java developer to build software drivers for any ILS by focusing on just what is necessary to code for that particular ILS - without learning the details of the NCIP protocol. Once a driver is created, the XC Team will share it with other libraries via the XC website. This collection of drivers can then be enhanced with performance improvements, upgrades, and bug fixes with the help of the XC community.

Standards Compliance: When used together with another XC application (the XC OAI Toolkit), the XC NCIP Toolkit implements all of the relevant functions required to meet Level 3 of the Digital Library Federation's ILS Discovery Interface Task Force (ILS-DI) draft recommendations for integration between an ILS and discovery systems such as XC. The XC NCIP Toolkit goes beyond the NCIP standard (while maintaining the option to strictly adhere to NCIP) to support the ILS-DI recommendations for GetAvailability and GetPatronInfo. For application developers, the NCIP Toolkit offers a standard web services gateway to connect to an ILS for real time circulation status, circulation requests, and authentication.

Easy Setup: The setup of the XC NCIP Toolkit is straightforward and requires no programming skills. An experienced ILS system administrator can get it up and running in a few hours. Should you need us, the XC Project Team is available to help. Let us know if you have trouble, and we will assist you in getting it up and running!

Take That First Step!

Getting the XC NCIP Toolkit up and running is the first step towards enabling your library for the XC next generation platform for discovery services. Download the software here: http://code.google.com/p/xnciptoolkit/

Other eXtensible Catalog Software:

Available Now: By using the XC OAI Toolkit, your library can repurpose the metadata in your ILS for use in other applications and systems, with little effort and expense. It enables your library to identify problems with legacy metadata, prepare it for clean up, and transmit it to a variety of web applications where it can be discovered by your users. Download the XC OAI Toolkit here: http://code.google.com/p/xnciptoolkit/

Coming Soon: The XC Metadata Services Toolkit will work with the XC OAI Toolkit to fully enable data cleanup projects, including FRBRization of MARC data, aggregation of content from multiple ILSs and digital repositories, and authority control across metadata formats.

Coming in 2010: The XC Drupal Toolkit will provide a revolutionary new way to integrate searchable library metadata, ILS circulation services, and library website content into a feature-rich web user interface.
## Appendix C - Action Items

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>By When</th>
</tr>
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<tbody>
<tr>
<td>Check with LLAMA-SASS / RUSA STARS groups about participating in ALA forum again this summer</td>
<td>Wanner</td>
<td></td>
</tr>
<tr>
<td>Draft language describing the Core Message Sets and how an implementer describes its support for them</td>
<td>Iddings, Campbell, Wanner</td>
<td>ALA Annual 2010</td>
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<tr>
<td>Revise existing implementer registry submission forms and create versions for self-service</td>
<td>Wanner, Campbell, Jackson</td>
<td>ALA Annual 2010</td>
</tr>
<tr>
<td>Draft an invitation to NCIP Social at ALA Annual</td>
<td>Wanner, Jackson</td>
<td></td>
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<tr>
<td>Follow up with Kotecha at RapidRadio to get additional details from presentation</td>
<td>Walsh</td>
<td></td>
</tr>
<tr>
<td>Attempt to determine whether NCIP can be considered RESTful</td>
<td>Wetzel, Stewart</td>
<td>May 7, 2010</td>
</tr>
<tr>
<td>Implement accepted change requests in schema</td>
<td>O’Brien</td>
<td></td>
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<tr>
<td>Update Standard to reflect accepted change requests</td>
<td>Walsh</td>
<td>June 30, 2010</td>
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<tr>
<td>Respond to those who submitted proposals to let them know the disposition of their requests</td>
<td>Walsh, Wanner</td>
<td></td>
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<tr>
<td>Review codepad.org to determine whether something similar might be possible for NCIP</td>
<td>Campbell</td>
<td></td>
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<tr>
<td>Contact VTLS to determine if they wish to remain active in the NCIP IG</td>
<td>Walsh, Wanner, Wetzel</td>
<td></td>
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<tr>
<td>Clarify with NISO how information is disseminated publicly (i.e., Minutes moved to public NISO workroom for NCIP)</td>
<td>Wanner, Walsh</td>
<td></td>
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<tr>
<td>Confirm dates for September meeting with Ex Libris</td>
<td>Dicus</td>
<td></td>
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<tr>
<td>Obtain list of those subscribed to the general interest list serve</td>
<td>Walsh</td>
<td></td>
</tr>
</tbody>
</table>