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Information and documentation -- Interlibrary Loan Transactions

Information et documentation -- Transactions de prêt interlibrairies

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**Information and documentation —
Interlibrary Loan Transactions**

Information et documentation — Transactions de prêt interbibliothécaires

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation on the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the WTO principles in the Technical Barriers to Trade (TBT) see the following URL: Foreword - Supplementary information

The committee responsible for this document is ISO/TC 46, *Information and documentation*, Subcommittee SC 4, *Technical interoperability*.

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Introduction

This International Standard will at first, supplement and eventually succeed the old ISO interlibrary lending protocol (consisting of ISO 10160, ISO 10161-1, and ISO 10161-2). Unlike its predecessor, this International Standard is well suited to the modern, Web-based technological environment which is based on XML and Web services. Another important difference between the two standards is that, while the old standard is based on a 1980s model of ILL transactions, its successor is based on and supports a much simpler exchange of transactions.

ISO TC 46/SC 4 made an attempt to revise ILL standards in 2007. The chosen policy, careful revision of the existing International Standard, failed, since for some SC 4 P-members the revision was too radical, whereas some other P-members indicated that it was not thorough enough. In order to avoid a similar deadlock, SC 4 plenary meeting chose a different strategy in 2012. The committee will keep the old standard alive as long as necessary by, for example, making the editorial changes needed. But SC 4 also decided to start the development of a new, Web-enabled ILL standard.

The new International Standard specifies three simple messages: a request, a supplying library message, and a requesting library message. The protocol is stateless, which means that there will be no need to maintain the interconnected state tables in the client and server applications (and the connections to the state tables in applications behind them). The new ILL protocol will be much easier to implement than the old one, while still retaining the essential functionality of its predecessor.

This International Standard is the first part of a more general strategic initiative to standardize resource sharing in ISO/TC 46/SC 4 *Technical interoperability*. As part of this intention, the editors have aligned element names, transport, and XML schema with similar functions in ANSI/NISO Z39.83 *NISO Circulation Interchange Protocol*.

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Information and documentation — Interlibrary Loan Transactions

1 Scope

This International Standard specifies the transactions between libraries or libraries and other agencies to handle requests for library items and the following exchange of messages.

2 Normative references

The following documents, in whole or in part, are normatively referenced in this document and are indispensable for its application. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 2108, *Information and documentation — International standard book number (ISBN)*

ISO 3166-1, *Codes for the representation of names of countries and their subdivisions — Part 1: Country codes*

ISO 3166-2, *Codes for the representation of names of countries and their subdivisions — Part 2: Country subdivision code*

ISO 3297, *Information and documentation — International standard serial number (ISSN)*

ISO 4217, *Codes for the representation of currencies*

ISO 8601, *Data elements and interchange formats — Information interchange — Representation of dates and times*

ISO 10957, *Information and documentation — International standard music number (ISMN)*

ISO 15511, *Information and documentation — International standard identifier for libraries and related organizations (ISIL)*

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

3.1

agency

library, library-related organization, or other agency such as an archive or a museum, or a commercial document supplier

3.2

library

organization, or part of an organization, the main aim of which is to maintain a collection and to facilitate by services of a staff, the use of such documents as are required to meet the informational, research, educational, or recreational needs of its users

3.3

requesting agency

agency which can send requests for library items and receive them from the supplying agency

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3.4

supplying agency

agency which receives requests for library items and delivers them to the requesting agency

3.5

library-related organization

institution, company, consortium, or other organization which handles ILL requests and/or receives requested library items on behalf of one or more libraries

3.6

library items

books, journals, articles, music, etc., or copies of these in physical or digital format

4 Messages

4.1 General

This International Standard specifies three messages and responses to them for handling interlibrary loan transactions:

- Request and Request Confirmation;
- Supplying Agency Message and Supplying Agency Message Confirmation;
- Requesting Agency Message and Requesting Agency Message Confirmation.

For Request, Supplying Agency Message, and Requesting Agency Message, a confirmation message is sent immediately (see 4.3, 4.5, and 4.7). The Request Confirmation message is not a positive or negative response to the Request; it indicates only that the Request message has been received. If the Request message contains problems, the Request Confirmation message shall include Error Data (see 4.10).

The following are the codes used in the tables:

- R: Repeatable;
- M: Mandatory;
- CT: Complex Type;
- OC: Open Code List (i.e. Scheme Value Pair);
- CC: Closed Code List (i.e. the code list is part of the ILL standard);
- SC: Standard Code List.

Open Code lists are predefined schemes, consisting of an enumerated list of possible values for a given data element that should be supported by applications conformant with this International Standard. The Open Code lists of values are not comprehensive and implementer groups can develop additional schemes for these enumerated types to cover their implementation requirements. Thus, an application can choose to support additional schemes for one or more Open Code lists. Core lists of values to be supported by all implementations are defined in Annex B.

Standard Code Lists are based on code lists published in International Standards or other normative documents.

New schemes and values can be added to the Open Code List as described in Annex B.

Complex Types are listed and defined in 4.8.

Closed Code Lists (see 4.9) are a normative part of this International Standard and shall be supported by applications conformant with this International Standard. They are similar to Open Code Lists, except

that Closed Code lists of values are expected to be relatively comprehensive and stable. Therefore, no online version of these lists shall be made available. However, new Closed Code scheme elements and code values can be added to the future versions of this International Standard.

Date and time shall always be provided in the format of YYYY-MM-DDThh:mm:ssZ, as specified by ISO 8601. When time is not significant, e.g. when a due date is given, use 23:59:59Z to indicate the time. For example: 2013-05-15T23:59:59Z.

4.2 Request

The Request contains information about the item and service requested.

The Request is sent from the requesting agency to the supplying agency.

The Request contains some or all of the following groups of data elements:

- Header: Administrative information;
- BibliographicInfo: Details of the item being requested;
- PublicationInfo: Information about the publication;
- ServiceInfo: Details of the service being requested;
- SupplierInfo: List of potential suppliers;
- RequestedDeliveryInfo: Where and how to send the item;
- RequestingAgencyInfo: Details about the requesting agency;
- PatronInfo: Details about the patron;
- BillingInfo: How to charge the requesting agency.

Table 1 — Request

Element	Definition	Codes
Header	<i>Administrative information</i>	M
SupplyingAgencyId	Identification of supplying library (Complex Type AgencyId)	M CT
RequestingAgencyId	Identification of requesting library (Complex Type AgencyId)	M CT
Timestamp	Date and time of the transaction Ref. ISO 8601 Format: UTC: YYYY-MM-DDThh:mm:ssZ	M
RequestingAgencyRequestId	Requesting library's request identification or number	M
RequestingAgencyAuthentification	Authentication in supplying library system of the requesting library (Complex Type)	CT
BibliographicInfo	<i>Bibliographic Information about the requested item</i>	M
SupplierUniqueRecordId	<i>SupplierUniqueRecordId</i> should be used for the Supplying library's internal unique identifier for the requested item, acquired from a preceding automatic holdings request. If this identifier is used, there should be no other identifiers in <i>BibliographicInfo</i> . More information is provided in Annex E .	
Title	Title of the requested item	

Table 1 (continued)

Element	Definition	Codes
Author	Author of the requested item	
Subtitle	Subtitle of the requested item	
SeriesTitle	Title of the series	
Edition	Number of the edition	
TitleOfComponent	Title of the component part (e.g. article)	
AuthorOfComponent	Author of the component part	
Volume	Volume number	
Issue	Issue number	
PagesRequested	Page from and page to	
EstimatedNoPages	Expected number of pages	
BibliographicItemId	Identification of a physical or electronic object (Complex Type)	R CT
Sponsor	Person or organization sponsoring the publication	
InformationSource	Description of where bibliographic information was found	
BibliographicRecordId	Identification of a bibliographic record (Complex Type)	CT R
PublicationInfo	<i>Information about the publication</i>	
Publisher	Name of the publisher	
PublicationType	Type of publication	OC
PublicationDate	Date of publication NOTE For serials and serial articles, this should be the publication date of the component part such as issue, not the date when the serial was first issued.	
PlaceOfPublication	Place of publication, e.g. a city	
ServiceInfo	<i>Information about the requested service</i>	M
RequestType	Type of request (new, retry, or reminder) If no request type is specified, the default is "new".	CC
RequestingAgencyPrevious-RequestId	Requesting Agency's previous request number when a retry is sent with updated data based on ReasonRetry	
ServiceType	Type of service. Values: Copy, Loan, or CopyOrLoan. If Copy is requested, then the requesting library is interested only in a copy. If Loan is requested, then the requesting library is interested only in a loan. If CopyOrLoan is requested, then the requesting library is willing to accept either a copy or a loan.	M CC
ServiceLevel	Level of service	OC
PreferredFormat	Format of medium requested	OC
NeedBeforeDate	The request is not relevant after the stated date/time. Ref. ISO 8601 Format: UTC: YYYY-MM-DDThh:mm:ssZ	
CopyrightCompliance	The requesting library's copyright compliance	OC
AnyEdition	Values: Y or N. Yes, for yes to any edition. No, if only the specified edition is acceptable.	
Note	Human-readable note	

Table 1 (continued)

Element	Definition	Codes
SupplierInfo	<i>When a request is sent to a brokering institution, the requesting library can provide a list of potential suppliers (in preference order). Intended primarily for requests sent to brokers, but can be used in other circumstances as well.</i>	R
SortOrder	Value from 1 to 99 defining the order of preference of use	
SupplierCode	Code defining a potential supplier (Complex Type AgencyId)	CT
SupplierDescription	Textual information about supplier	
BibliographicRecordId	Identification of a bibliographic record used (Complex Type)	CT
CallNumber	Indication of the shelf position of the resource	
SummaryHoldings	Textual description of summary level holdings	
AvailabilityNote	Information about availability	
RequestedDeliveryInfo	<i>A prioritized list of suggested delivery methods, each with its own delivery address</i>	R
SortOrder	Value from 1 to 99 according to the order	
Address	Description of the delivery address (Complex Type ElectronicAddress or PhysicalAddress)	CT
RequestingAgencyInfo	<i>Details of the Requesting Agency</i>	
Name	Name of the Requesting Agency	
ContactName	Name of contact. For example, ILL staff member.	
Address	Description of how to contact the Requesting Agency (Complex Type ElectronicAddress or PhysicalAddress)	CT R
PatronInfo	<i>Details of the patron for whom the request is being made. Only used according to 5.3 Data privacy protection.</i>	
PatronId	Identification of the patron	
Surname	Surname of the patron	
GivenName	First name of the patron	
PatronType	Type of patron	OC
SendToPatron	Only used with value "Y", if requesting library asks the supplying library to send the requested resource directly to the patron	
Address	Description of how to contact the patron (Complex Type ElectronicAddress or PhysicalAddress)	CT R
BillingInfo	<i>Information about how the requesting agency expects to be billed for and pay for the item</i>	
PaymentMethod	The preferred payment method	OC
MaximumCosts	The highest amount the requesting agency is prepared to pay for the service (Complex Type Costs)	CT
BillingMethod	Preferred billing method	OC