

## Systemwide Operations and Planning Advisory Group (SOPAG)

### SOPAG Meeting, December 6, 2001 - special meeting - Action Minutes

See also <http://libraries.universityofcalifornia.edu/sopag/>

**Present:** J. Tanno (Chair), T. Dearie, B. Hurley, C. Howard, C. Johns, J. Kochi (Recorder), S. Lessick, B. Miller, P. Mirsky, K. McGirr, J. Ober.

**Absent:** A. Bunting

#### 1. CDL-related Items

##### 1.1 Transitions/Melvyl and A&I

Cris Campbell joined the meeting to discuss several Melvyl-T policy issues sent to SOPAG.

##### 1.1.1 Record Format Standards and Copy-level Information

The Melvyl-T Database and Technology Team revised the document "Standard for University of California Union Catalog Input Records" as of November 29, 2001. The Heads of Technical Services and LTAG were asked to review the document. The 11-29-01 version incorporates all comments received and has been endorsed by HOTS.

Hurley requested that the last sentence in item 4.4 ("This information should not be transmitted in the Melvyl input record.") be removed. If the local data must be removed, then it would require specific programming.

**ACTION:** Campbell will propose removing the last sentence in item 4.4.

**ACTION:** SOPAG approves the new standard pending the above deletion.

The document "Record Standards and Level of Holdings" was brought back to SOPAG (see June 29, 2001 minutes for earlier discussion) after Berkeley withdrew the proposal to send copy level information to Melvyl to be used as a backup in emergency situations.

SOPAG endorses Recommendation 3 that "Melvyl input streams be required to convert to one of the acceptable output standard formats at a convenient point in their system life cycles."

SOPAG is ready to move forward with the establishment of a process and a calendar for implementation. The Melvyl-T Database and Technology Team has thoughts on how to move the process forward and will send SOPAG a recommendation.

**ACTION:** Melvyl-T Database and Technology Team will send their thoughts to SOPAG at least two weeks before the January 25, 2002 meeting to help begin the process

##### 1.1.2 Archiving and Returnability

Previous discussion of the document "Archiving of Campus Input Files and Returnability of

Campus Records" was held at the June 29, 2001 meeting. Now that Berkeley has withdrawn its proposal, the document was submitted for SOPAG approval.

SOPAG approves the recommendations.

### **1.1.3 Non-UC Contributions Background**

The document "CDL Relationship with non-UC Contributing Libraries" was submitted to introduce the topic.

Discussion focused on the future of non-UC records in the catalog, both in terms of usefulness of the data as well as political. SOPAG is interested in knowing how many unique records the non-UC contributors provide to the collection. Separate consideration of the usefulness of the records from the difficulty of dealing with the records needs to take place. It was discussed that this might be an opportunity to impose record standards for inclusion in Melvyl-T.

**ACTION:** Melvyl-T Implementation Team will ascertain how many unique records the non-UC contributors provide.

**ACTION:** At the January 25 meeting, SOPAG will discuss how to best to gather qualitative information from campus constituencies regarding the value of the non-UC contributors' records in Melvyl.

### **1.1.4 Update**

The beta database now planned to consist of 630,000 records for testing the new catalog software and interface - is 1 ½ - 2 months behind schedule due to late deliverables by Ex Libris. The beta database probably will not be available until late January 2002.

### **1.1.5 A&I Transitions**

Ober reported continuing progress including communication activities, e.g. on a FAQ for the use of bibliographic citation software. He also forwarded the project's proposed name for SFX linking services, endorsed by the Transition Steering Committee's, for SOPAG endorsement. SOPAG endorsed "UC-eLinks" as the service name.

## **1.2 Request**

### **1.2.1 Request Liaisons**

The Request Project Team has identified the need to have campus liaisons to aid in the technical set up and operation of an UC-operated system. The team recommends that each campus appoint a Request ILL Liaison and a Request Technical Liaison.

**ACTION:** Ober will send an email requesting that SOPAG members appoint liaisons to fill both roles for their campus no later than January 15, 2002.

### **1.2.2 RSC Issues**

Two issues that have arisen from RSC discussions concerning Request are: should there be limits on the number of items a patron can request and what are the implication of offering a

blank web form for non-UC holdings? Dearie reports that system-wide around 27 users per month are hitting the current 20-item/day limit within Request.

**ACTION:** RSC will re-look at limits and determine if they are still appropriate.

### 1.2.3 Web Document Delivery

Initially it was thought that web document delivery would be the default delivery method for Request. However, IAG reports that approximately 20% of Request users do not want web delivery of material. IAG recommends that users be given the option to not get their material delivered via the Web but that they must check a box opting out of web delivery.

Implementation of the scanners is uneven. UCSF, one of UCSD sites, and the NRLF are all reporting problems getting the Minolta working with the Ariel 3.1 software.

Fretwell-Downing is in negotiation with RLG to use their web document delivery software. If the negotiations fail, then Fretwell-Downing will develop their own software and have it available by April 2002.

### 1.2.4 ILL Loan Periods

IAG recommends keeping the current limits until the CBS becomes available. At that point limits for the longer loan period would increase from three to six months for faculty and graduate students. Without the CBS, the increase would have to be for everyone since the current system cannot differentiate patron status.

**ACTION:** Tanno will inform the ULs that the increase in loan periods will be implemented after the implementation of the CBS.

### 1.2.5 Need by Date field

Currently the Need by Date field in Request is not linked to a real date and requests are not cancelled after the Need by Date passes. With VDX, it is possible to link to an actual date and the system will automatically email the user once the date passes and ask if the user wants to re-initialize the request. IAG is looking into this option more closely and will recommend a possible change in wording to make the option clearer.

### 1.2.6 Special Collections Request

SOPAG re-affirmed that the special collection Request was a one-year pilot. The pilot will end August 2002. Some data collection has been occurring but the Request Project Team is finding that the data collection methods are too complicated so not enough data has been collected to be able to accurately evaluate the service. The Heads of Special Collections group is interested in the number of items being requested that could be obtained another way. SOPAG is interested in how many requests have been approved or denied by curators and in determining systemic reasons for patterns of approvals and denials.

**ACTION:** Dearie will investigate gathering the requested data.

**ACTION:** Tanno will send an update to the ULs.

### 1.3 CDL Updates

1.3.1 The Elsevier contract renewal negotiations are nearing completion.

1.3.2 There is an imminent deal between NetLibrary and the CDL and UC Press for the repurchase of the digital files of approximately 1400 UC Press titles that NetLibrary owns.

1.3.3 JSC priorities and workplan are being developed. A discussion of whether or not a SOPAG representative should be on JSC occurred, although SOPAG members reported feeling comfortable with JSC communications.

1.3.4 The possible purchase of a digitized collection of East Asian journals is being pursued.

1.3.5 UCOP's Academic Affairs is officially under hiring and expenditure restrictions under the direction of the provost.

1.3.6 It is hoped that an announcement regarding the CDL's UL will be made at the end of December/beginning of January.

1.3.7 Ober directed attention to the latest report of CDL education programs and its focus on education, outreach, and usability activities associated with the catalog and A&I transitions.

## 2. New Initiatives

### 2.1 CMI Update

CMI is currently in Phase II. Usage data for 1st Quarter is due January 18, 2002. The group reports that they have not received any comments concerning the project.

### 2.2 E-Scholarship Liaison

As a follow up to discussions at the Joint ULs/SOPAG meeting of October 26, 2001, the e-Scholarship initiative was asked to identify ways to improve the linkages between the initiative and the campus libraries, especially with regard to faculty communications.

**ACTION:** CDL will draft a proposal for discussion at the next SOPAG meeting that would establish a strategic and programmatic liaison at each campus library for the e-Scholarship initiative.

### 2.3 Amigos Membership

Three campuses have joined Amigos through the Library of California. So far, there has been little use made of the benefits of membership, but it bears further exploration.

**ACTION:** SOPAG will follow up with CDC regarding possible advantages in contracting through AMIGOS for electronic resources.

### **3. Workshops**

#### **3.1 Metadata**

Hurley submitted a new draft proposal for the metadata workshops. The Task Group recommends that two sessions be offered: one is a survey of UC digital library projects and the other is a digital library developers workshop.

SOPAG agreed that the task group was on the right path and made several recommendations:

§ In the first session, consider including SAGE and ERDB with the Infomine Project and have a panel discussion about their projects

§ Have a round robin or poster sessions so people other than the invited speakers could talk about digital library initiatives they're involved in

§ Follow the DLF Forum format and provide both technical and non-technical topics CDL is interested in the concept and would be interested in a co-sponsorship of the first session.

**ACTION:** Add Ober to the task group membership.

**ACTION:** Hurley will rename the group to better reflect its mission; and ask the group to forward a proposal following established format.

#### **3.2 Circulation Best Practices**

The proposal is being worked on but is not finalized yet.

#### **3.3 Teaching for Self-Directed Learners**

There will be two sessions offered in both the north (January 31 and February 1, 2002) and in the south (February 4 and 5, 2002). A total of 80 participants in each location will be able to attend.

**ACTION:** Ober will send a message to SOPAG with the new numbers of attendance per campus as well as the names that were sent in for the last session.

### **4. Topics deferred until next meeting:**

- Funding Strategies for CDL Collections
- The DLF and UC
- Rights Management in the Digital Environment
- ARL E-Metrics

Next meeting: December 7, 2001 (meeting with chairs of All-Campus Groups)

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