

## Systemwide Operations and Planning Advisory Group (SOPAG)

### SOPAG Meeting, Friday, February 27, 2004 -- Action Minutes

Also posted at <http://libraries.universityofcalifornia.edu/sopag/>

**Present:** Cruse, Dearie, Hurley (Recorder), Kochi, McGirr, Miller, Mirsky, Moody, Ober, Ryan, Tanji, Tanno (Chair), Wittenbach

**Absent:** None

*Chair's Note:* This was John Ober's last meeting with SOPAG and the group wanted to thank and commend him for his significant contributions and collegiality. While the group will miss John, we all welcome and look forward to working with the new CDL representative, Patricia Cruse.

#### 1.0 Electronic Resources Management Systems (ERMS)

SOPAG discussed the upcoming "UC Electronic Resources Management Planning Meeting: Needs, Priorities, and Systems" that will be held at UC Irvine on March 11<sup>th</sup> and 12<sup>th</sup>. The agenda and planned outcomes for the meeting were approved. All participants have been given assignments to complete prior to attending the meeting. SOPAG commended S. Wittenbach and the ERMS Planning Committee for the excellent work it has achieved under very tight time constraints.

**ACTION:** Each campus will complete the ERMS survey distributed by the Program Committee and return it to S. Wittenbach by March 3<sup>rd</sup>.

#### 2.0 All Campus Groups (ACG) - Updates

The SOPAG Liaisons gave updates on ACG activities. These included: a CDC meeting with Bernie Reilly, the President of the Center for Research Libraries; agreement in principle by HOTS to classify electronic monographs if classification is available (recommendation will come to SOPAG); and a discussion of a paper prepared by J. Ober titled "How We (may) Work." The Ober paper reviewed how SOPAG conducts its meetings, communicates with other groups and offered suggestions on how Web-based meeting and collaboration tools may help these processes.

**ACTION:** SOPAG has decided to test Microsoft's Web-based meeting and collaboration tool called SharePoint Teams that is running at UCLA. SOPAG members will upgrade their local PC software (as needed) to ensure all the benefits of Shared Point Teams is available.

SOPAG also discussed the report by RSC's Subcommittee on Advanced Forms of Digital Delivery. This report was requested by the University Librarians, through SOPAG, to explore how the RLFs could digitize shared print collections materials and provide advanced forms of digital delivery that would make circulation from the print archives unnecessary. The report noted that 99% of materials received by the RLFs, and therefore candidates for

shared print collections can be digitized with existing equipment and delivered by existing procedures. However, the report went on to identify materials that are not currently adequately served, including items with important use of color, maps, microfilm, microfiche, oversized materials and special collections.

**ACTION:** The RSC Subcommittee report did an excellent job of identifying materials that are and are not adequately served with existing RLF equipment and delivery procedures. SOPAG will now ask RSC to take the next step and address operational issues in using advanced forms of digital delivery. Some of these were itemized in the report, others may include developing guidelines for determining when the use of advanced delivery is important (e.g. when color is important), keeping statistics to help characterize the use of material by type and collection (e.g. print surrogates of the shared digital collection; shared print materials, “dim archive” materials), and to identify problem areas (e.g., people requesting shared print materials because of poor quality of the digital version), etc.

### **3.0 CDL Related Items**

**3.1 CBS Update** - RSC provided SOPAG with a written update on the implementation of the UC Consortial Borrowing System (CBS). J. Ober reported that the vendor’s release date for the next version of the software (version 2.7), which was expected in February has been delayed until June. The RSC update included two recommendations the first of which was to ensure an ILL practitioner continued to work with the CDL, as the CBS software is being implemented. The second recommendation was to encourage SOPAG to consider ways (e.g., meetings, consultants, etc.) to help ILL and public service managers revise their ILL workflows and procedures to take full advantage of the CBS features.

**ACTION (re: rec. #1):** Jennifer Lee (UCLA) is the ILL practitioner who has very successfully been working with the CDL and campuses on the CBS implementation. As her term for this work has expired, CDL will consult with UCLA to see if her time can be extended.

**ACTION (re: rec. #2):** While SOPAG understands the value of re-engineering ILL workflows to fully take advantage of the CBS software, it notes that most campus implementations are already in progress. Rather than disrupt this work, SOPAG will ask RSC to revisit this recommendation after the CBS system is implemented and we have more experience to bring to the re-engineering process.

**3.2 Streamlining Link Resolver Services** – J. Ober shared by email a draft paper on the different link resolvers used within the UC Libraries digital infrastructure and how their support may be streamlined. Link resolvers are used to translate “persistent names” for digital items into the current URLs used to access them. The CDL will enlist SOPAG’s advice on the process to gather input on the options for link resolver support, once they are further developed. No action required.

**3.3 CDL Spring Digital library Updates** - SOPAG discussed the goals and logistics behind a CDL proposal to present updates this spring for library staff to increase the awareness of

CDL services, collections and digital infrastructure. The updates will explore how the CDL infrastructure can be customized for better integration with local services and collections. SOPAG welcomes the updates. No action required.

#### **4.0 Systemwide Library Planning**

J. Ober distributed a series of draft documents to SOPAG including a strategic directions statement prepared by the ULs and two papers on scholarly communications. These papers were provided as a “heads-up” to SOPAG and no further action is required at this time.

#### **5.0 Implementing Shared Collections of Government Information**

T. Dearie gave an update on the pilot project to create a shared print collection of government documents. SOPAG then discussed a number of questions raised by the Task Force that is charged with implementing the pilot.

**ACTION:** The Task Force has identified 15 titles for inclusion in the pilot and should obtain permission from campus SOPAG representatives to have these included in the shared collection.

**ACTION:** SOPAG requests that the Task Force compose questions that need to be asked of the Superintendent of Federal Documents regarding the withdrawal of depository materials based on the existence of a shared collection.

**ACTION:** The Task Force should work with RSC to determine how shared print records will be marked in Melvyl to show they have special access requirements, as part of a depository collection.

**Next meeting: March 19<sup>th</sup>, 2004**