Systemwide Operations and Planning Group (SOPAG)

SOPAG Meeting, July 27, 2001, Action Minutes

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

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

I. Electronic records management proposal:

> The group discussed the revised document entitled, Proposal for Electronic Records Management Task Force. A number of other editorial changes were proposed which Phyllis Mirsky will convey to B. Westbrook and B. Zornado. Following an email from Connie Williams, Manager, Information Resources & Communication, the statement that the Records Management Committee endorsed the proposal will be removed from the document (p.7). After further revisions are made, the final version of the Proposal will be forwarded to the University Librarian's. The UL's will be asked to endorse the proposal and determine the correct procedure for creating such a group.

II. Collection Management Initiative:

C. Johns reported on the progress of the CMI. The date by which print journals were to be removed from library shelves and transferred to storage has slipped. SOPAG discussed possible alternative dates from beginning with the first week in September to during the winter break. The original goal of the project was to have all experimental volumes off the shelves by the beginning of fall sessions on each campus. It was pointed out that the medical and law schools begin mid August. SOPAG members pointed out that from an operational standpoint, it is better to remove volumes in the fall than between quarters.

The CMI staff in Oakland are finalizing a database of matched pairs that should be ready to distribute in the next few days. C. Johns has drafted procedures from the reports of the Operations Advisory Committee subgroups. These procedures will be sent out for review by CMI liaisons and the Operations Advisory Committee.

III. CDL related items:
Updates:
J. Ober reported on the progress of the search for the UL for the CDL.

J. Ober reported that the CDL Key Indicators of Collections and Use would be distributed to SOPAG directly; their availability has already been announced in CDLINFO.

J. Ober reported on new services that the CDL is rolling out. These were included in the recent CDLInfo as well. They include:

- Counting California
- Escholarship and UC Press collaborating have published 60 titles in digital form
- PubMed with links to UC Request, holdings and licensed full content

J. Ober reported that while in the past CDL initiated new services twice a year on specific dates as new "Releases of the CDL," now there will no longer be two release dates because of other factors driving deadlines, e.g., grant requirements, balancing staff workloads, needs of external partners, etc. From now on, new services will be initiated as they are ready, but those with major impact on public services will take the academic year into consideration.

Transitions/Melvyl and A&I:
J. Ober alerted SOPAG that the CDL had received questions about use of funds distributed to campuses to support the A&I transitions, and that such queries were directed back to the campus library administrations at whose discretion they are used.

Melvyl-T Policy issues

Copy level information:
The issue of copy level information was discussed again. The question is: should Melvyl be able to serve as backup to campus systems? The issue is complicated by the potential need to maintain second and third copy level information for a single location, e.g., Special Collections.

Initial analysis by the transition team suggests that this would not be difficult to implement, but database size and performance might be affected if every campus provided detailed holdings information such that Melvyl could provide a complete backup for their local system. It has not been determined how much copy level information is included in the various input streams.

Specific questions regarding operational considerations for copy level records will be forwarded to HOTS and LTAG. SOPAG reminded CDL that it agreed with CDL's recommendation that copy level information should not display; the crux of CDL's investigation is to consider the cost and operational issues of storing copy level information for campuses that desire this backup support. CDL should separately identify and describe policy questions related to display of copies at single locations as mentioned above and consult with SOPAG and all campus groups accordingly.

Visits of CDL Transition Team to campuses:
J. Ober announced that the CDL transition team has visited UC Davis and will be visiting UC Santa Barbara to discuss their transitions to the Ex-Libris system. Issues to be discussed include the timing of these campus transitions and their relationship to campus records in Melvyl and Melvyl-T.

Melvyl-T Server RFP:
The RFP evaluation prior to the purchase of server hardware for Melvyl-T is nearing completion. . Discussions are ongoing with UC Berkeley, UCOP's Information Resources and Communications, and the Super Computer at UCSD for data center hosting services for Melvyl-T.

Other:
The question of submitting order records to Melvyl was raised but no decision was made. At some point there should be a review of the current policy regarding this issue. This is one of a

number of policy issues affecting the potential for some campuses to use Melvyl as the local catalog, now and in the future.

50,000 CDL records are now running in a test file along with CDL-defined indexes, an important milestone for Melvyl-T.

A&I Implementation groups and responsibilities:
The A&I Transition Steering Committee has been reappointed as a steering committee to advise on the implementation phase of databases with external vendors.

The PubMed rollout on July 18th was successful. A few minor bugs related to PubMed and Request have been resolved.

A call has gone out for additional resource liaisons. Resource liaisons for databases in the A&I transitions will have important roles in the success of those transitions.

A test version of the SFX server is up for testing. Initial priorities for SFX are links to holdings, content, and Request. Use of SFX depends upon vendor ability and willingness to use the OpenURL standard (upon which SFX is based). In some cases links will be made available through alternative routes. For example, PubMed is not supporting Open URL at this time so UC links to content, holdings, and Request are constructed through specific NLM-CDL arrangements.

Request, CBS, Desk Top Delivery:

CBS:
A question and answer document providing background about the Consortial Borrowing System has been widely distributed.

Negotiations with the "apparent successful" bidder for the CBS have been moving forward. Implementation will be in three phases with at least two campuses needed for implementation of the first phase. The first phase will begin in December/January. It is anticipated that all campuses will have implemented CBS by June 2002. Campuses can chose the phase most convenient to them.

Document Desktop Delivery:
Implementing desktop delivery before the CBS is available is optional. Some campuses will wait until CBS is in place; others will go ahead with an interim strategy. One such strategy would be to use Relais Express or Ariel 3.0 in the interim; however, the Ariel software has not yet been released by RLG. Another more labor intensive option would be to send documents to the Web and notify the patron via email that they are available.

The Request team will recommend to RSC that providing users with an option to designate desktop delivery as a delivery mode be deferred until desktop delivery can be implemented systemwide. In the interim, campuses wishing to implement desktop delivery can just make the "default" mode of delivery and inform the user and the appropriate campus ILL center.

CDL Acquisitions Contacts—proposed meeting in Oakland:
SOPAG discussed the purpose of the meeting of CDL acquisitions contacts and decided it could support this meeting.

Visual Resources – follow up to UL discussion:
Acting on the UL's indication of an opportunity for SOPAG to provide leadership, the group identified a number of questions to be addressed regarding access to digital visual resources and the role that CDL could assume. Should UC endorse pilots or consider larger issues? Should we focus on UC library owned images only? Should we work with constituencies outside the libraries, such as the sliders? What are the metadata issues? What level of access would be appropriate?

We concluded that we need a statement of the problem from which further discussion and/or action could be taken.

ACTION: J.Ober will draft a statement for review by SOPAG.

IV. Planning for 2001-02:
SOPAG members discussed a number of issues that might be addressed in the coming year, including recruitment of librarians, government documents, coordinating print collections in a digital environment, training library staff, ongoing evaluation of how we are carrying out our roles, attracting new sources of funding, and content of Melvyl.

ACTION: P.Mirsky will share these potential agenda items with the University Librarians Steering Committee.

Continuing discussion on All campus groups and strategies for coming year:
SOPAG has invited chairs of the All campus groups to meet with us at our December meeting. We have also asked that each group develop goals for the future.

Identification of agenda items for UL's and timing of reports from TF/committee

Task Forces Updates:
The following task forces continue to work:

Digital Preservation
Digital Reference
Access Integration

V. Workshops:
Metadata:
No further developments were reported. The group still plans to consult LTAG.

Copyright:
The Copyright workshop is scheduled for October 25 (UCI) and October 26 (UCB). A web page for the workshop is almost ready to debut.

Teaching for Self-Directed Learners:
J. Ober reminded members that attendees for these regional workshops (9/10/01 in the North; 9/12/01 in the South) are due 8/15/01. Attendance will be limited to 60 at each site and apportioned according to the formula used for other workshops. Waiting list names may be submitted and will be accommodated as possible.

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