

**University of California  
Resource Sharing Committee  
Conference Call Minutes  
April 17, 2008**

**1. Roll call**

Present: Linda Kennedy (UCD), Collette Ford (UCI, Recorder), Don Sloane (UCLA), Eric Scott (UCM), Vince Novoa (UCR), Marlayna Christensen (UCSD, Chair), Aleta Asbury (UCSF), Sarah Troy (UCSC), Scott Miller (NRLF), Colleen Carlton (SRLF), Sherry Willhite (CDL), Lisa Mix (LAUC) and Gail Yokote (SOPAG).

**2. Meeting Minutes**

Christensen posted to the RSC website the minutes of the January conference call since they had been approved via email. Christensen suggested that the minutes be written and distributed shortly after each conference call/meeting so that RSC has a record of our discussion and action items.

**ACTION:** Each recorder will write the minutes and distribute them to RSC within 1-2 weeks of the meetings/conference calls. Minutes will be approved via email, unless agenda topics require further discussion. Once approved, the minutes will be posted on the RSC website.

**3. RSC Liaison to CAG**

Christensen thanked Eric Scott for his past service as the RSC representative to CAG. Christensen also thanked Sarah Troy (UCSC) who volunteered to serve as the new RSC representative. Troy's appointment was approved previously by RSC via e-mail.

**4. Proposed Dates for 2008-2009 Meetings and Conference Calls**

Christensen will use TimeBridge to schedule future meetings and conference calls since RSC agreed that the technology is working well. Christensen has added some additional dates and times for the July meeting since none of the previous ones worked for all RSC members.

Date	Meeting Time	Location	Recorder
July 2008	tba	Conference call	Merced (NRLF)
October 2008	10am – 3pm	Oakland	NRLF (Riverside)
January 2009	tba	Conference call	Riverside (San Francisco)
April 2009	tba	Conference call	San Francisco (Santa Barbara)
July 2009	tba	Conference call	Santa Barbara (Santa Cruz)

**5. Tricor Report to the University Librarians Update**

Christensen reported that she has not received a response to the report. Yokote stated that the University Librarians (ULs) were considering the RSC report together with several others, including SCAP. Yokote also stated that it is important to note in any discussions with staff that the ULs have not made a decision about the recommendations in the Report.

Christensen noted that the 2008-2009 MOU with Tricor has not been signed. She will investigate with the appropriate UCOP staff the advisability of making changes to the MOU. She noted that the methodology by which the fuel surcharge is assessed is not included in the MOU and that the 2003 MOU language about not modifying the MOU within the first twelve months was not included in the 2008-2009 MOU.

Christensen advised RSC members to review the Tricor MOU for the accuracy concerning local details (stops, weights, etc.). If there are discrepancies, please contact Marlayna.

**6. SOPAG Update (see attached e-mail report)**

Regarding the Taiwan Electronic Periodical Service (TEPS) and National Palace Museum Online (NPM), the

database-level cataloging has been completed and will be distributed to the campuses on Monday, April 21, 2008. As the TEPS journal titles are cataloged, they will be added to the campus catalogs. Yokote and RSC discussed the ILL reports required by Airiti and the database producers. We hope that an aggregated report that will meet the requirements can be produced via VDX.

**ACTION:** Yokote will work with Annie Lin, the resource liaison for these products, and Carl Coker on the criteria needed for the report on ILL use required by Airiti. She will forward the criteria to Willhite at CDL who will investigate whether an aggregated report including all campus ILL activity for the TEPS titles can be generated via VDX.

Yokote reported that SOPAG endorsed the HOPS comments regarding the proposed Emergency Contact Workshop, especially about having a narrower focus on the implications for user services in an emergency or disaster. She mentioned that the National Library of Medicine's regional library network has developed a plan and suggested that a RSC member contact Heidi Sandstrom, Associate Director of the Pacific Southwest Region, National Network of Libraries of Medicine (PSR-NN/LM), for the details.

#### **7. *UC Libraries Emergency Contact Workshop Update***

RSC discussed the workshop plans in light of the feedback from HOPS and SOPAG, especially the need to focus the workshop on maintaining/re-establishing user services in emergencies/disasters. Possible topics RSC discussed include how we can help each other when a disaster impacts some campuses, and how to get services back up quickly as well as dealing with long-term disruptions of service. Troy and Scott volunteered to assist Sloane and Christensen with redrafting the workshop proposal. RSC agreed that the timeline also will need to be revised in order to allow time to develop a high-quality program.

**ACTION:** Sloane will contact Heidi Sandstrom, Associate Director of PSR-NN/LM, for information about their plans. He will distribute the information to Christensen, Troy and Scott. Christensen will set up a conference call so they can begin redrafting the workshop proposal.

#### **8. *CDL/VDX Report (see attached e-mail report)***

In response to questions about the brief report she distributed prior to the meeting, Willhite stated that CDL is in the process of setting up a central document server to support electronic document desktop delivery without the use of Ariel. Originally, the intent was to rollout the new document server with the next (and now delayed) release of VDX 3.2.2. RSC members support rolling out the new document server as soon as possible without waiting for the next release of VDX 3.2.2.

#### **9. *CAG Report (see attached e-mail report)***

Scott reported on CAG's discussion on establishing a centralized web-accessible repository for CAG-related information such as: policy documents, job descriptions, statistics, training materials, meeting reports, and historical information. He said that UC Merced may host the materials on their server. RSC members agreed that it would be useful to have these materials organized and maintained in one location. CAG also discussed the *Future of Public Services Report*, including the trend of creating a common user experience, both online and in person. Christensen again thanked Eric Scott for his past service as the RSC representative to CAG.

#### **10. *OCLC Next Generation Melvyl Catalog Update***

According to the report supplied by Rubens prior to the RSC conference call, testing and revisions/fixes continue, and will continue through the pilot. She suggested that we monitor the information on the project website ([http://libraries.universityofcalifornia.edu/about/uc\\_oclc.html](http://libraries.universityofcalifornia.edu/about/uc_oclc.html)). Christensen asked how campuses were demonstrating and promoting OCLC Next Generation Melvyl Catalog. Several campuses have demonstrated it to faculty; others have provided links from their websites.

#### **11. *IAG Report***

No report in the absence of Johnson and Rubens.

## **12. Next Conference Call**

- Agenda Building
- OCLC Next Generation Melvyl Catalog implementation issues
- RSC Annual Report
- Emergency Workshop update

**ACTION:** To assist Christensen in drafting the RSC Annual Report, RSC members were asked to provide input about our goals for the next year.

## **13. Adjourned at 2:52pm**

## ***SOPAG Update***

- 1) For TEPS, JSC has approved cataloging the TEPS journals (400+) as a priority for SCP. The Chinese cataloger hired to handle the East Asian titles in CDL packages will begin to catalog once she has been notified. Thus, the TEPS titles will show in MELVYL. Campuses are testing the access to make sure that all participating campuses have access: UCB, UCD, UCI, UCLA, UCM, UCR, UCSB, UCSD. Annie is reviewing Charlotte's questions in order to prepare a response.
- 2) For NPM, this is an image database, so the likelihood of ILL requests for images will be slim to none. SCP will create a record for the database only. You may consider the use of NPM similar to ArtStor. I have not heard of any ILL requests going to UC campuses because of access to ArtStor.

Annie and I will be sending updates as we learn more about the reports that Airiti is looking for.

## **CDL Report for April 17, 2008 RSC meeting**

Sherry Willhite

### *RECENTLY RELEASED*

- *Feb 2008*—My ILL Requests statistics went live on February 21.
- *March 2008*—VDX web stats went live in March 25. VDX stats reports from Feb 2008 forward are on InsideCDL in HTML, campuses can create custom reports and export them as tab delimited files to load into Excel. We are no longer using Crystal reports
- *April 2008*—Enhancement to My ILL Request on April 1. Users can now sort by due date.

### *IN THE WORKS*

- **VDX**
  - Desktop delivery**—CDL is setting up a central document server to support electronic desktop delivery without the use of Ariel. Documents are scanned as PDF, sent to the document server via ftp, and linked to the ILL record in the VDX web interface with just a few mouse clicks, streamlining the workflow. The documents are automatically deleted when the expiration date is reached. Initially this will be used for desktop delivery between UC campuses.
  - Statistics**—The VDX tech team is moving forward with the installation of the new statistical reporting software.
  - Accessible archives**—The team is continuing to work on the VDX archives project that will allow campuses to access the archived records and use the archived data for reports. This is a very succinct way to describe an enormous project.
- **Request**
  - WorldCat Local**—The Request tech team is focusing on the programming changes needed to integrate Request with WorldCat local in order to use WCL as the source of holdings for Request for “day 2” of the pilot later this year. Once this work is complete, users will be able to make a Request directly from the WCL interface, without going through UC-eLinks.

### *ON THE HORIZON*

- **VDX software upgrade**

The VDX 3.2.2 should be released soon. The upgrade at the beta sites went well. Once this is released CDL will install on our development server. We could do an upgrade in late 2008; the schedule depends on how the initial installation works out.

## ***CAG Report to RSC 4/17/2008***

### **CAG Annual Meeting – March 26, 2008**

*Present:* Marianne Hawkins (UCD), Mark Marrow (UCB), Mary Weppeler-Selear (UCM), Eric Scott (RSC), John Bareford (UCI), Andy Panado (UCSF, Chair Elect), Jon Edmondson (SRLF, Chair), Val Rom-Hawkins (UCLA), Sharla Desens (UCR), Claudia Jimenez (UCSB), Gary Johnson (UCSB), Nicole Lawson (UCSC), Marlayna Christensen (UCSD), Jason Schulz (UCSD)

*Absent:* Jutta Weimhoff (NRLF)

*Guests:* Marlayna Christensen (RSC-Chair); Gary Johnson (RSC-UCSB)

#### *Officers:*

- Outgoing Chair – Jon Edmondson
- Current Chair – Andy Panado
- Chair-elect – Valerie Rom-Hawkins

#### *New members:*

- Nicole Lawson, UCSC

#### *Topics discussed:*

- SOPAG/HOPS Future of Public Services Report
- Standardization of loan periods
- Centralized student assistant training
- Digital reference services currently being offered
- Centralized web-accessible repository for CAG-related information such as: policy documents, job descriptions, statistics, training materials, meeting reports possibly including videos of presentations, historical information
- Collection of use statistics
- Job descriptions (in context of a major HR revamp at UCB and presentation at Circheads)

#### *RSC Report (Marlayna Christensen & Eric Scott)*

- Tricor Report (generated a fairly lengthy discussion)
- Direct borrowing with other VDX-equipped institutions
- VDX 3.3.2 implementation
- Update on status of planning for Symposium for Emergency and Disaster Preparedness (also a rather lengthy discussion)
- Active shooter training and exercises at various campuses (follow-on from Symposium... discussion)

#### *Goals & Objectives for 2008*

- Update CAG website on UCOP; develop a website hosted by one of the campuses
- Report going out for the Future of Public Services (HOPS report)
- Jon Edmondson will present a talk about training in dealing with difficult patrons
- CAG members will read *The Gift of Fear* by Gavin de Becker.

#### *UC Circheads Annual Meeting – March 27, 2008*

- See attached 2008 UC Circheads Agenda



## **UC CircHeads Annual Meeting (2008)**

**03/27/08, Thursday, 8:30am-5:00pm**

**UC San Diego Geisel Library, Seuss Room**

### **8:30-9:00am**

Coffee and pastries

### **9:00-9:15am**

Welcome statement from Catherine Friedman, AUL Public Services

Agenda information and housekeeping issues by Andy Panado

### **9:15-9:30pm**

Report from CAG by Jon Edmondson

### **9:30-10:45am**

Campus Updates

### **10:45-11:00am**

Morning break

### **11:00-12:00pm**

Job Descriptions (Vince Novoa and Valerie Rom-Hawkins)

### **12:00-1:30pm**

Lunch

### **1:30-2:00pm**

Update on UC/OCLC Implementation Team

### **2-2:45pm**

Supervising Students (Katica Got, Felicia Bryan, and Sylvia Villa)

### **2:45-3:00pm**

Afternoon break

### **3:00-3:45pm**

Staff Technical Training Needs (Bonnie Hain-Anderson, Colleen Evans and Sylvia Villa)

### **3:45-4:15**

2009 CircHeads Planning

### **4:15-4:30pm**

Concluding Remarks

### **4:30-5:00pm**

UCSD Library Tour

## ***OCLC Next Generation Melvyl Catalog Update***

UC-OCLC Implementation has been referred to in a variety of ways but is now being called “Next-Generation Melvyl Pilot”. Information about the Pilot is available at:

[http://libraries.universityofcalifornia.edu/about/uc\\_oclc.html](http://libraries.universityofcalifornia.edu/about/uc_oclc.html)

In early March 2008 campuses were provided with a “Next-Generation Melvyl Pilot Launch Toolkit” to assist in the promotion of and roll out of the Pilot. The Toolkit contains “mandatory and recommended communications actions” and is 15 pages long. An accompanying PowerPoint presentation developed with our end-users in mind was distributed and is entitled, “Next-Generation Melvyl Pilot supported by WorldCat Local: The Future of Searching.” The Toolkit and PowerPoint presentation are available for retrieval at the aforementioned UC Pilot Project’s website.

### **March 17<sup>th</sup>-21<sup>st</sup>**

Testing of the campus branded instances for the lead implementation campuses (UCB, UCD, UCLA, and UCSD) were conducted. The weeklong testing involved 8 groups carrying out their approved testing plans that included the testing of specifically designated records and conditions. For example, the Request Task Group ran tests on 44 different bib records to confirm that UC-eLinks was a reliable mechanism for users to make ILL requests originating in WCL. During the testing, problem reports specific to a testing group were prepared and sent to the relevant Task Group listserv. In turn, these reports were then analyzed by the Implementation Team and select problems were forwarded to OCLC or CDL for assessment.

### **April 1<sup>st</sup>-4<sup>th</sup>**

The remaining six campus WCL instances (UCSF, UCSC, UCM, UCSB, UCI, and UCR) were tested predicated on the same protocols established in the first round.

It is projected that sometime during the week of April 15-18 the 11 instances, including the “Melvyl” view, will be released to UC libraries’ staff to gain experience with the Next-Generation Melvyl Pilot catalog before it is released to the public, which is currently expected to be on April 28<sup>th</sup>.

The pilot will last at least six months. Interlibrary loan and campus Document Delivery requests initiated in WorldCat Local will be processed through the UC-eLinks mechanism. In the fall a more streamlined “Request” function will be added to WCL. During the Pilot formal usability testing will be done by staff for UC students, faculty, staff and others. Feedback is encouraged and can be sent to: [uccat@cdlib.org](mailto:uccat@cdlib.org)