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## CDL Tools and Services Working Group

1/17/01

### *Charge:*

The concept of a working group focused on tools and services for sharing, accessing, manipulating, and integrating scholarly content in all forms directly supports one of the CDL's goals. It also developed from discussions with the Systemwide Operations and Planning Group and the Joint Steering Committee on Shared Collections as an appropriate structure for ensuring that tools and services are available for each collection. The Tools and Services Working Group was first appointed in January 1999.

Examples of tools include search interfaces, profiling or customizing options, mechanisms to download search results, links between metadata and primary content, options to request items, etc. Specialized tools may emulate traditional tools used by various disciplines or they may break ground by working with digital content in new ways. Tools also may be facilities that are invisible to the user but contribute to the smooth functioning of the system.

The development of some digital collections is dependent upon the availability of appropriate tools and cannot proceed until they are in place. Just as a strategy and overall framework were defined for developing the collections, similar guiding principles are needed for the development of high quality tools and services. There is also a desire to reduce duplication of tool development and leverage initiatives begun by individual campuses that might benefit all campuses. This group should take a systemwide and inclusive viewpoint to this effort.

The Tools and Services Working Group was initially charged as follows:

1. Develop principles and guidelines for the identification, evaluation, selection and implementation of online tools and services for sharing, accessing, manipulating, and integrating scholarly content in all forms. These principles and guidelines should reflect coordination with principles and guidelines developed for building the collections.

### **Functional Classes of Tools and Services** 5/26/99 (including Key Challenges)

[http://www.cdlib.org/libstaff/system\\_services/tswg/classes\\_tools\\_all\\_19990526.pdf](http://www.cdlib.org/libstaff/system_services/tswg/classes_tools_all_19990526.pdf)

### **CDL Tools and Services Selection Criteria** 3/12/99

[http://www.cdlib.org/libstaff/system\\_services/tswg/ts\\_criteria\\_draft4.pdf](http://www.cdlib.org/libstaff/system_services/tswg/ts_criteria_draft4.pdf)

### **Resource Selection/Evaluation Criteria** 6/9/00

[http://www.cdlib.org/libstaff/system\\_services/tswg/Database\\_Selection\\_Criteria\\_v4.rtf](http://www.cdlib.org/libstaff/system_services/tswg/Database_Selection_Criteria_v4.rtf)

2. Establish appropriate strategies, processes and consultative mechanisms for identifying desirable tools and services, including paths for moving campus-developed tools to the CDL. Assure that these mechanisms include documentable consultation with constituency groups (librarians, faculty, and graduate students).

### **Process for Soliciting and Evaluating Tools and Services** 3/18/99

[http://www.cdlib.org/libstaff/system\\_services/tswg/process\\_overview.pdf](http://www.cdlib.org/libstaff/system_services/tswg/process_overview.pdf)

3. Identify, charge, communicate with, and provide leadership to task groups to develop specific tools where in-depth expertise is required.

Charged Bibliographic Software Task Force, August 2000

[http://www.cdlib.org/libstaff/system\\_services/tswg/charge.pdf](http://www.cdlib.org/libstaff/system_services/tswg/charge.pdf)

4. Recommend a process for prioritizing tools and services to be implemented, and develop a priority list twice a year according to this process to coordinate with scheduled releases of the CDL web site. Provide rationales for priority recommendation that consider costs and benefits.

See documents in item 2 above.

5. Develop principles and guidelines for the type and frequency of evaluation of tools and services, both before and after they are implemented.
6. Inform and consult regularly with the Systemwide Operations and Planning Group, and appropriate public services and systems groups. Refer to SOPAG issues requiring multi-functional perspectives.
7. Develop and maintain regular communication of the working group's activities to various UC constituent groups.

Although the above items will be reviewed and revised as needed, the group now is charged to focus on the following specific issues:

1. Actively monitor developments in shared collections to identify new opportunities for tools and services, especially those that can serve multiple disciplines or subject areas.  
For background information see:
  - Joint Steering Committee on Shared Collections Subject Area Survey Reports:  
<http://www.cdlib.org/libstaff/sharedcoll/jsc/surveys.html>
  - e-books Task Force: <http://www.cdlib.org/libstaff/sharedcoll/jsc/ebook/>
2. Participate in the transition of the Melvyl Catalog and CDL-hosted abstracting and indexing databases as requested by the Transition Steering Committee and the project teams in the assessment and development of tools and services.
3. Actively monitor developments in eScholarship to identify tools and services which might have wider application or present opportunities for integration with existing tools and services.
4. Review the Selection Criteria periodically, especially when new content initiatives such as Counting California and the Online Archive of California may present new requirements for specialized tools and services.
5. Review the Functional Categories of Tools and Services once a year to update the inventory of existing tools and services, identify new challenges and priorities, and add to or revise the categories to reflect the current environment.
6. Establish an ongoing mechanism to communicate with the Strategic Development group in the CDL about new functional issues which may suggest the need for strategic development, as well as to stay abreast of developments which may enhance existing tools and services.
7. Develop a conceptual framework, model or architecture for representing how CDL tools and services support the research and instruction process. This scheme complements the Functional Classes document to provide an overview of existing tools and services, and a tool for identifying where new development or integration is needed.