

APPENDIX G - Statement of the CDL Executive Management Group

TO: Pathfinder Review Committee

FROM: CDL Executive Management Group (Dan Greenstein, UL, plus Directors Candee, Cruse, Farley, French, Hutton and Ober)

DATE: November 14, 2003

The CDL Executive Group has reviewed the documentation produced thus far by the Pathfinder Review Committee. CDL supports in principle the idea of a common suite of bibliographic services that are able to support union and campus-based OPACs; however the timing of the Pathfinder exploration is difficult in at least three ways that preclude this development in the near term. First, the development and stabilization of Melvyl as a union catalog is expected to take all available CDL resources for at least the next year. Secondly, there is not yet a well-articulated set of principles and requirements for a bibliographic system that serves both systemwide and local needs, although the Pathfinder exploration may provide the base and impetus for such analysis. Third, it is not entirely clear that Melvyl, as it is currently constructed provides a service environment that is adequate to the dual purposes described above.

Six months after its release as a production system, Melvyl is still in a fledgling state, with CDL staff and Ex Libris software developers working to refine some basic functioning of the system. In addition, development work outlined in the initial RFP is scheduled to be delivered in a version upgrade (to version 16.02 from version 15.3) in March 2004. CDL staff resources will be fully committed for approximately six months from the new version release to the testing that will be required to carry out the version upgrade. It is not feasible to contemplate making additional changes to the system until the upgrade has taken place and the system is viewed as stable.

Although many of the desired enhancements for Berkeley's use of Melvyl as their OPAC may be feasible, they require further analysis to fully investigate and specify the changes that will be required not only for the indexing of the database but for the user interface. It will not be possible to commit staff resources to these tasks until the system is stable in version 16.

The RFP for Melvyl and the subsequent development process focused on Melvyl serving primarily as a systemwide union catalog rather than as a local campus OPAC. CDL would be very interested in beginning an evaluation of the system requirements necessary to serve both purposes which would be independent of the current capabilities of Ex Libris.

The CDL Exec group notes that systemwide discussions are under way about shared systems to handle shared print collections, as well as ongoing discussions and experiments related to access integration. As these discussions proceed during the interim period until Melvyl is stable under version 16, CDL hopes that principles will emerge to address the role of the union catalog and to shape future technological directions that can best accommodate campus as well as systemwide needs.

The Berkeley Library's investigation of Pathfinder's future is an excellent beginning to surface some of these issues. If CDL and the Berkeley Library could work together to develop high-level criteria for a system to serve systemwide and campus needs, we could then use them to determine whether they could be met by Ex Libris (following the migration to v. 16); if not, we would have a broad outline of the requirements for a future environment for our bibliographic systems.