

Everyday Electronic Material in Policy and Practice

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CNI Fall 2010 Membership Meeting

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Introduction

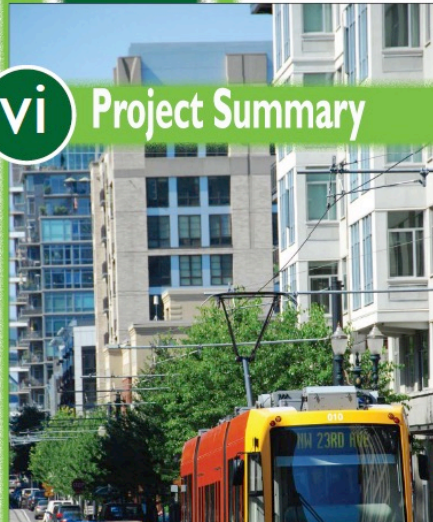
Cas

A Digit

International Standard

vi

Project Summary



vi

Project S

Oakland Streetcar at a Glance

- Length: 4.65 Miles
- Major destinations served:
 - Downtown
 - Ashland Square
 - Uptown
 - Upper Broadway
 - Chinatown
 - Old Oakland
 - Oakland Ave
 - Museum Park
- Transit Connections:
 - BART Station
 - Ashland
 - Broadway/Capitol
 - Corcoran Station
 - Oakland Ferry Terminal
 - 19th Ave Transit Bus Lines
- Construction Cost: \$175-\$200 Million
- Operations Cost: \$10-\$12 Million/year
- Ridership: 100,000-150,000/year
- Economic Development:
 - \$100-\$150 million in new jobs
 - \$10-\$15 million in new retail space
 - \$10-\$15 million in new office space
 - \$100-\$150 million in new construction
 - \$100-\$150 million in new retail space
- CO₂ Reduction: 100,000-150,000 tons/year
- Gasoline Savings: 100,000-150,000 gallons/year
- Funding:
 - Capital Cost: 50%-60% Federal, 20-30% Regional, 20-30% Private
 - Operations Cost: 70-80% Private, 20-30% Public

ofes

no

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CISAC
STANFORD

CENTER FOR INTERNATIONAL SECURITY
AND COOPERATION

AL AREA

April 1, 1962

(Revised slightly,
March 26, 1971, by
J. H. Thomas.)

POLICY IN CONTEXT

Negotiating with North Korea:
1992-2007

collecting area
al collections
have continued

or partially or
study are those

Policies and workflow needed

- For digital material that selectors deem important to include in SULAIR collections
 - That are not included in e-resource packages
 - That are vulnerable and may not be available from source over time

What if the trickle became an avalanche?



Brendio



Dawn

Needed: Processing Pipeline

- Capturing objects
- Determining rights
 - Redistribution
 - Preservation
- Technical Services processing
 - Purchasing
 - Creating metadata
- Providing access and preservation services



Yinghai

The Plan

- Based on work outlined in a planning grant (thank you Andrew W. Mellon Foundation)
- 14 months start to finish (Sept 09-Nov 10)
 - Convene cross-functional team
 - Create policies
 - Rights
 - Collecting
 - Develop software
 - Train
 - Share

Project launch

- Set up team
 - Project manager
 - Technical manager
 - UI design expert
 - 2 developers
 - Metadata specialist
 - 2 business analysts (librarians)
 - Collections
 - Technical Services
- Review specifications



Check work practices

- Adapted methods from CLIR workshop
- Video-recorded
 - Selector capturing digital material
 - Acquisitions staff processing e-resource requests





Functional Requirements

Added by [Katherine Kott](#), last edited by [Tom Cramer](#) on Nov 13, 2009 ([view change](#))

Requirements from five stakeholder groups

1. Requirements from Selectors

Function
Pre-order record-keeping
<ul style="list-style-type: none"> Ability to record rejection decisions on the
Make a request to Acquisitions
<ul style="list-style-type: none"> Indicate that there is a Symphony record for
<ul style="list-style-type: none"> Submit a digital object or objects to an online

Requirements,
project plan
documented on
wiki

Dashboard > EEMs > Everyday	EEMs
	DOR content metadata
Added by Lynn McRae , last edited by Lynn McRae on Jun 23, 2010 (view change)	
EEMs will use an aggregate model for describing an EEMs entry. In this model there is a parent node and one or more child nodes.	
The EEMs process starts with an EEMs request object, one that may turn into the bibliographic record (multiple Symphony records) (this process is not yet defined).	
EEMs Request Metadata	
The following datastreams are used in the parent to manage the EEMs request process and the request content files are uploaded.	
name	note
identityMetadata	Initially just the objectId, objectType, etc., later the catkey from Symphony
eemsProperties	Contains basic EEMs request values to manage the process -- selector surname, title, etc.
eemsActions	Records actors, actions, notes and communications between selector and project manager
eemsRequestWF	Workflow to manage the EEMs request and the creation of the Symphony record
eemsAccessionWF	Completes the DOR record -- descriptive metadata, ingest and shelving

Mock-ups for user interface

erials (EEMs) > Updated UI sketches 26-May-2010 Browse ▾

Widget - from dashboard

EEMSelect-o-matic ✕

Found on site

Language ▾

Title

Creator ▾

PDF

Select a PDF file to upload

Citation, comments, etc.

Copyright ▾

Purchase ▾

Development begins

- A “widget” that floats above web pages for upload and submission
- A “dashboard” for submitting after permission is received
- Necessary infrastructure for ingest into digital library environment
 - Digital Object Registry (Fedora)
 - Integration with Sirsi/Dynix Symphony system and SearchWorks

Policy questions arise

- Who has responsibility for determining redistribution rights?
- What collections policies pertain to this material?



Convened EEMs Policy Group

- AUL / Chief of Staff (copyright expert)
- AUL for Technical Services
- AUL for Collection Development
- AUL for Public Services
- AUL for the Science and Engineering Libraries and DLSS
- Associate Director, Digital Library Systems and Services

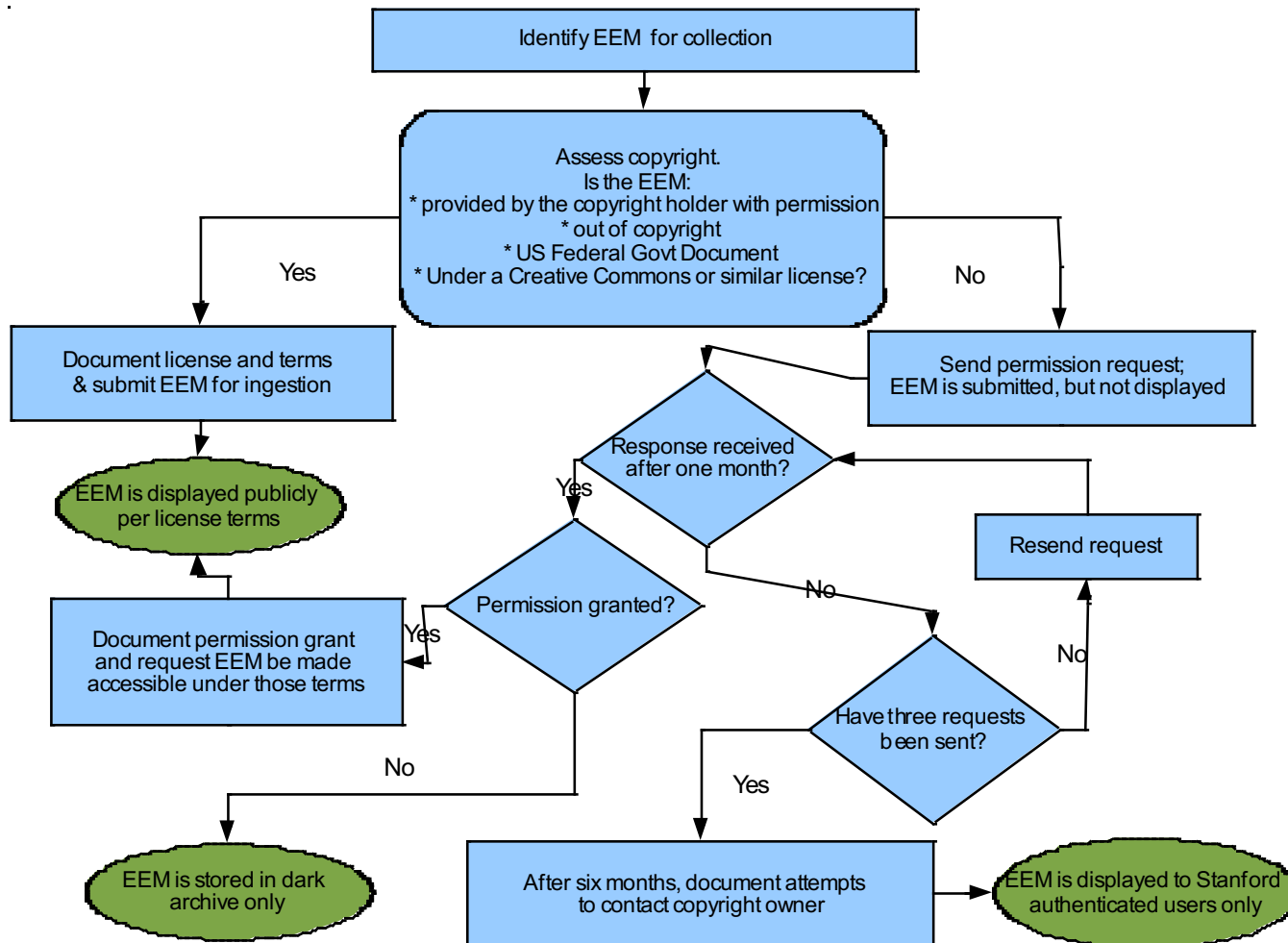
Distributing EEMs

- By collecting EEMs and posting them in our catalog, SULAIR is distributing the material
- Requires permission, since it is a rights holder's exclusive right
- Also requires that we undertake the assessments of risk that publishers normally undertake
 - Third-party copyright
 - Libel, privacy, etc.

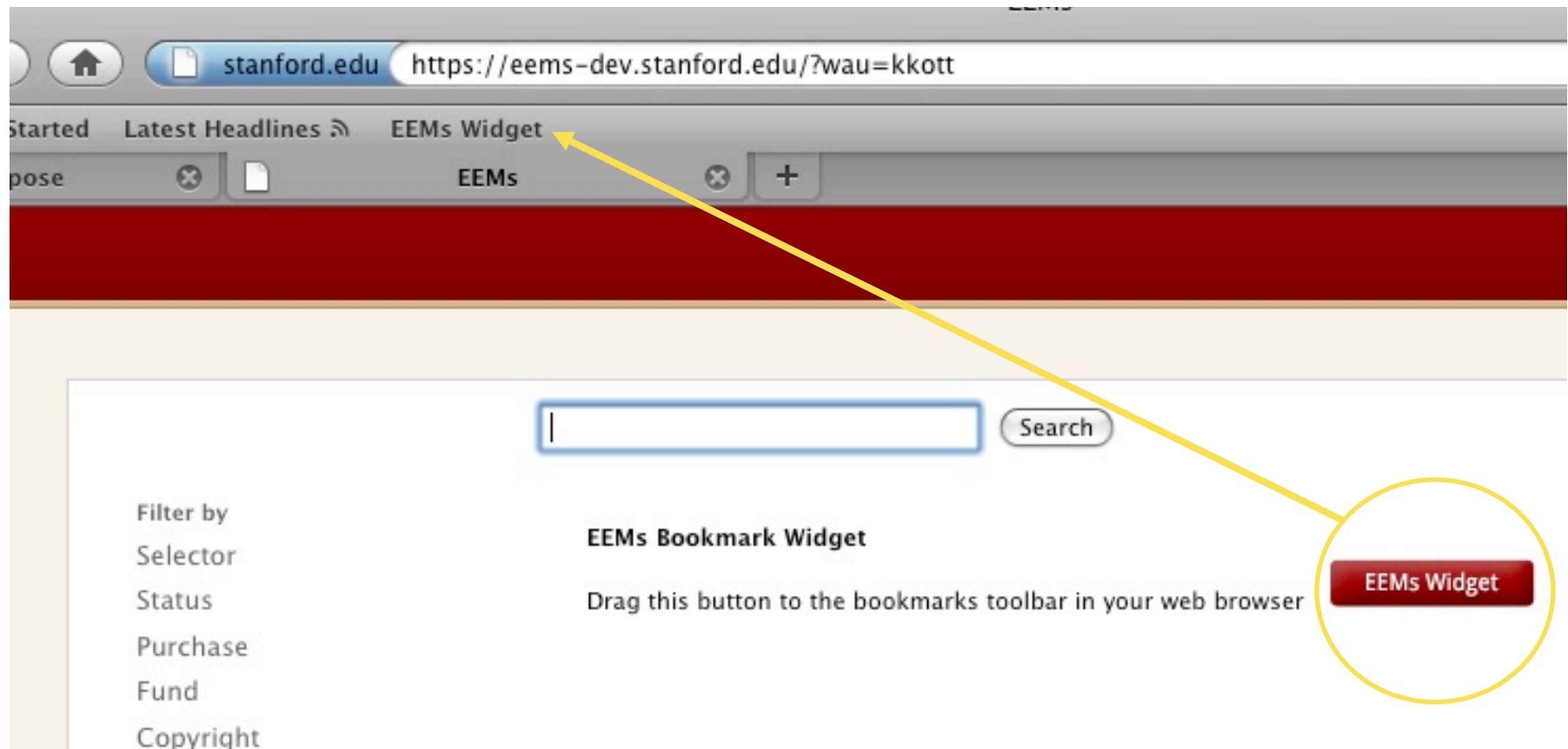
Rights limitations do not apply

- Educational use does not equal fair use
 - inclusion in the catalog is beyond the traditional understanding of educational use
- 108 and TEACH do not apply broadly
- 109 could apply if use is restricted to one user at a time (no current plan to implement)
- Issue has been extensively reviewed with the General Counsel

Permissions workflow



Drag and drop widget to browser toolbar



On source web page, launch widget

Click to launch

The screenshot shows a web browser window with the URL <http://www.liv.ac.uk/soclas/los/index.htm>. The browser's address bar and tabs are visible. The main content area displays the Liverpool Online Series (LOS) page, which includes a description of the series and a list of current titles. A blue arrow points to the 'EEMs' tab in the browser's tab bar. An 'EEMs Selection Widget' is overlaid on the right side of the page, containing a form for selecting a work to capture. The widget includes fields for 'Found on this site', 'Language', 'Title of work', 'Created by', 'Direct link to PDF', and a text area for '(Citation, comments, etc.)'. It also has dropdown menus for 'Copyright' and 'Purchase', and buttons for 'Send to Technical Services' and 'Save to dashboard'.

Each item will contain either unedited or otherwise unobtainable material, or material which for scholarly reasons requires an up-to-date edition.

The series accommodates editions in the original or in translation parallel translation into English. It aims primarily at the scholar specialist, but the format makes it accessible to the interested reader or student.

Current titles

[Three Old French Narrative Lays: Trot, Lecheor, Nabaret](#) (edited and translated by Leslie Brook and Glyn Burgess, 1999)

[Nineteenth-Century Women Seeking Expression: Translations of French](#) (edited by Rosemary Lloyd, 2000)

[Jacques Autreau, Le Chevalier Bayard](#) (performance and publication versions, edited by Richard Waller, 2000)

[Gustave Flaubert, Mémoires d'un fou/Memoirs of a Madman](#) (translation and critical edition by Timothy Unwin, 2001)

[Piramus et Tisbé](#) (edited by Penny Eley, 2001)

[Narcisus et Dané](#) (edited and translated by Penny Eley, 2002)

[Quinault, L'Amant indiscret](#) (critical edition by W.S. Brooks, 2003)

[Jehan Renart, Le Lai de l'Ombre](#) (translation and introduction by P. Tudor, text edited by Alan Hindley and Brian J. Levy, 2004)

[Doon and Tyolet: Two Old French Narrative Lays](#) (edited and translated by ...)

EEMs Selection Widget

Found on this site: <http://www.liv.ac.uk/soclas/los/index.htm>

Language: **English**

Title of work:

Created by: **organization**

Direct link to PDF:

† Drag and drop the link of the PDF you want to capture

(Citation, comments, etc.)

Copyright: **Requires request**

Purchase: **Free**

[Send to Technical Services](#) [Save to dashboard](#)

Return to EEMs dashboard to...

- Check status
- Change rights status and upload rights assertions
- Send to Technical Services
- Cancel requests

EEMs dashboard: List

Filter by

Selector

Glen Worthey (4) [remove]

Status

Purchase

Fund

Copyright

Language

Creator (organization)

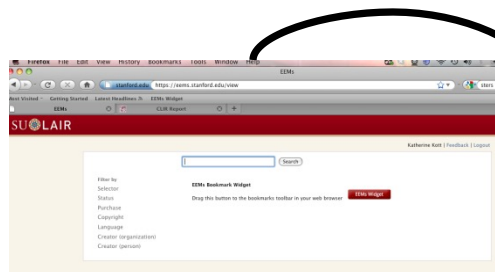
Creator (person)

Sort by relevance

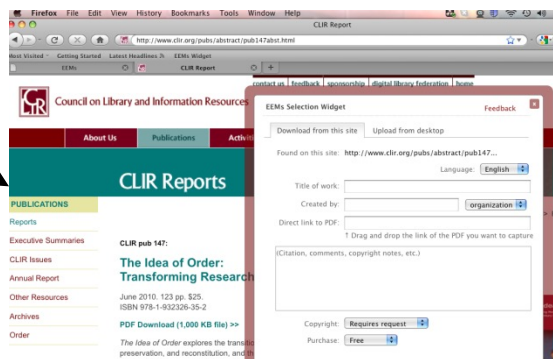
Show 10 per page

Title	Created	Submitted	Selector	Copyright	Status
История советских органов государственной безопасности	24-Jun-2010	24-Jun-2010	Glen Worthey	Public access OK	Submitted
FIRST CENSUS RESULTS BY MUNICIPALITIES AND SETTLEMENTS OF THE REPUBLIC OF SERBIA	24-Jun-2010	24-Jun-2010	Glen Worthey	Public access OK	Submitted
ITHAKA'S 2006 STUDIES OF KEY STAKEHOLDERS IN THE DIGITAL TRANSFORMATION IN HIGHER EDUCATION	24-Jun-2010	24-Jun-2010	Glen Worthey	Requires request	Submitted
FACULTY SURVEY 2009	24-Jun-2010	24-Jun-2010	Glen Worthey	Public access OK	Submitted

Everyday Electronic Materials (EEMs)

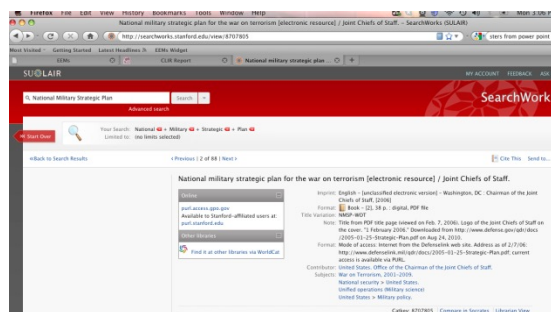
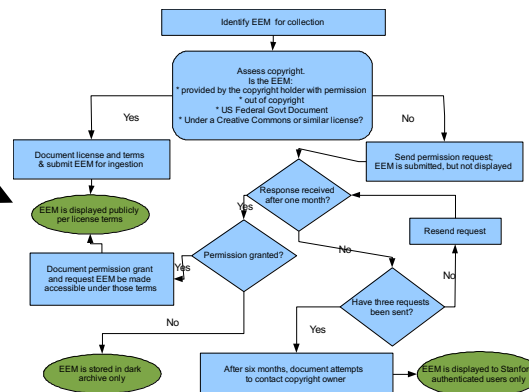


Web-based application provides “dashboard” for installing the widget and tracking EEMs

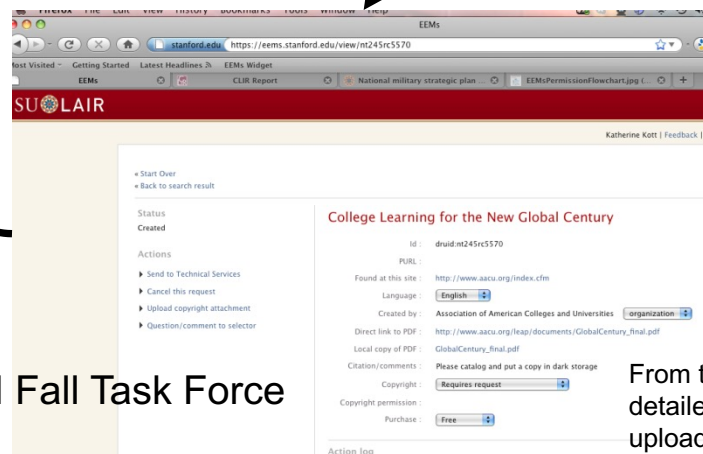


Launch widget “bookmarklet” to download PDFs found on the web or upload documents from the desktop

Send to Technical Services for Payment (if needed) and cataloging



When the title is cataloged, it is available through SearchWorks and Socrates OPACs



Determine whether permission must be obtained

From the dashboard's detailed view, selector may upload rights assertion documentation, or cancel the request

Workflow for collecting single digital objects: CNI Fall Task Force Meeting, December 12-13, 2010

Collection policies

- When rights issues are complex, prefer purchasing print, if available
- In what collection areas are EEMs key resources?
- Are EEMs the new “gray literature?”

Technical services workflow

- There may be different records for different manifestations
- What is the priority for EEMs processing?
- Technical services processing can handle single title selection, but not bulk harvesting

Help for Selectors

[E-Resource Ordering Form.](#)

For new licensed e-resources, such as databases, backfiles, and e-book packages.

- [Documentation](#)
- [FAQ](#)

[Internet Cataloging Form.](#)

For requesting cataloging of a free e-resource, or adding a link to an existing resource.

- [FAQ](#)

[EEMs \(Everyday Electronic Materials\) for All.](#)

For capturing e-resources to be added to the collection and preserved in the digital repository.

Outstanding questions

- Would a permissions workflow support tool be a valuable addition to the EEMs tool?
- What kind of bulk harvesting might be enabled for this type of material?

More information at lib.stanford.edu/eems

QUESTIONS AND COMMENTS