

Systemwide Operations and Planning Group (SOPAG)
SOPAG Meeting, July 26, 2002, Action Minutes

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

Present: A. Bunting, T. Dearie, B. Hurley, J. Kochi (recorder), K. McGirr, B. Miller, P. Mirsky, M. Moody, J. Ober, L. Tanji, J. Tanno (Chair), S. Wittenbach

Guests: D. Greenstein, B. French

Tanno welcomed Stefanie Wittenbach (Riverside) and Lorelei Tanji (Irvine) as new SOPAG members.

1.0 Report on CDL-Related Items

1.1. Melvyl Transition: A performance test on the 24 million record database was run. Performance wasn't spectacular, but the problems have been identified and are being addressed. There will probably be 3 or 4 rounds of performance testing.

1.1.1. Non-UC Records

Ober updated SOPAG on inclusion of non-UC monograph records in Melvyl-T. CDL has analyzed the staffing costs to load records as well as ongoing maintenance costs. Ober characterized the ongoing costs as opportunity costs, i.e. constraining resources somewhat available for use in other CDL initiatives. Non-UC contributors are those institutions not governed by the UC Regents.

ACTION: SOPAG endorses loading of all records and continuing maintenance costs. SOPAG encourages CDL to work with institutions that have a high ongoing maintenance costs to help them lower costs (e.g., insist on schedule of input; meet record standards sooner; move those institutions to cost recovery for maintenance).

ACTION: SOPAG should look at serials section of Non-UC Contributors to MELVYL document before the next meeting and review the records' usefulness given how infrequently some of the records are updated. Options for non-UC serials will be discussed at the September meeting.

1.1.2. CDL Location in Melvyl-T

All campuses except UCSF agreed that removing the CDL location was the best option. The campus feedback will provide a framework for discussion and usability testing for a different systemwide location of materials, such as a UC-ALL location.

ACTION: Initially Melvyl-T will not include the CDL location, but CDL will continue to work with the system and experiment with alternatives.

1.1.3. Melvyl Quality Control: Single or Multi Record Formats

The Shared Cataloging Steering Committee has been working on a report that discusses similar issues.

ACTION: Tanno will ask HOTS to review the Shared Cataloging Steering Committee's report and make a recommendation to SOPAG by the end of October. In addition, Tanno will request that HOTS: 1) ask HOPS and RSC for input to ensure the public service perspective is addressed; and 2) conduct a survey to determine current campus practice/preference for single vs. multiple records for monographs. The survey should also determine if the campuses are adhering to the current UC standard for serials records and, if not, determine why this is the case.

1.2 A & I Transition Update: All databases are now available; Ovid, Gale, and PubMed have been added to the list of databases for which UC-eLinks is turned on; SearchLight is using vendor interfaces. The Transition Steering Committee is discussing the best way to prepare users for the transition to the new interfaces and is making recommendations about what the Melvyl home page should look like. There have been reports that the transition is causing a lot of work at the service points at campus libraries. Dearie reported that use of Request through UC-eLinks is booming.

1.3 UC-eLinks Update: Ober presented a document on the possibility of campuses adding locally licensed content to UC-eLinks. There are advantages to CDL hosting a single SFX server and creating separate tables for each campus, including a consistent look and feel and the ability to offer ubiquitous services. A hybrid environment with two servers is possible, but it may not be a graceful solution. Davis is interested in keeping a separate server. CDL will continue to provide PubMed LinkOut updates while getting UC-eLinks local holdings up and running.

ACTION: SOPAG endorses CDL beginning discussions with Ex Libris about a single server solution.

ACTION: Tanno will look into Davis' concerns/issues and share them with SOPAG.

1.4 Request/Desktop Delivery: Significant progress has been made installing VDX and turning on CBS. UCLA has tested the system, and UCSD is getting ready to test but is having performance issues. Once campus testing is completed by the end of summer, only OCLC testing is left. Since OCLC offers very limited testing periods it is difficult to project when this testing will be completed.

Desktop Delivery: 8 campuses have it up and running and are using it to respond to Request transactions. Some campuses are considering purchasing Relais because the Fretwell Downing client isn't available and Ariel is still not working.

ACTION: CDL will prepare a more in-depth report on Request and Desktop Delivery for September meeting.

1.5 CMI Update: Data from 2 quarters is now available on the CMI web site <<http://www.ucop.edu/cmi/>>. A large-scale survey of user reaction is being prepared for

Fall. SOPAG briefly discussed how planning for print cancellations could take into account the outcomes of the CMI.

ACTION: Tanno will request guidance from the ULs on what issues SOPAG can begin to work on in relation to the cancellation of print copies without working at cross purposes with CMPG.

1.6 CDL Campus Visits: CDL staff have been visiting campuses, and the visits have been well received.

2.0 All Campus Groups

2.1 SOPAG Policies on Web Presence, etc.: Policies have been distributed to the All-Campus Groups.

2.2. Heads of Public services (HOPS)

2.2.1. Charge

Ober mentioned that in regards to item 4 under key issues, a standard called Shibboleth is coming out of the Internet2 community. Greenstein and Ober are discussing with UCOP to see what role CDL can play. A new SOPAG liaison to HOPS needs to be named.

ACTION: Moody will be the SOPAG liaison to HOPS.

ACTION: Tanno will let HOPS know that their charge has been reviewed and that SOPAG has no further suggestions.

2.2.2. Digital Reference Common Interest Group

ACTION: Tanno will let HOPS know that the charge has been accepted and that they can appoint the group.

2.3 Resource Sharing Committee (RSC)

2.3.1. ARL ILL/DD Project [<http://www.arl.org/stats/newmeas/ill-dd.html>]

Dearie surveyed campuses to see who would be participating in the ARL ILL/DD Project.

Yes: Berkeley, Los Angeles, Davis (Shields only),

Maybe: San Diego - strong maybe; Irvine - strong maybe; Santa Barbara – no or maybe

No: Riverside

San Francisco and Santa Cruz are not eligible, but Santa Cruz is negotiating.

2.3.2. Circulation Advisory Group Blocking Proposal

Several campuses had concerns with the blocking proposal. SOPAG suggested that it would be better to rework the proposal as an agreement between libraries on facilitating communications

and lending instead of as a blocking policy. In addition, the reworked agreement should be presented to the ULs.

ACTION: Dearie will take the proposal back to RSC to rework it .

2.4. Library Privacy Liaisons

2.4.1. Appointment & Charge

Merced will not have a representative but may add one at a later date. The charge is completed and campus membership finalized, but LAUC will not send a slate until after August 16 (?).

ACTION: Once a slate is received from LAUC, Tanno will appoint the group.

ACTION: Kochi will be the SOPAG liaison to LPL.

2.4.2. Charge to LTAG

SOPAG approved the charge for LTAG's new task to develop guidelines for the retention of UC Library systems records.

ACTION: Tanno will send charge to LTAG.

3.0 Task Forces

3.1. Task Force on Government Documents

The feedback from UC/Stanford Government Information Librarians was discussed. SOPAG discussed focusing the framework on a digital repository that deals with archives and preservation of government publications but is done in such a way that provides principles for minimizing print collections and addresses the issue of unnecessary duplication among campuses.

ACTION: Tanno will revise the charge to include the following points:

- reference to GILS and the EGIIG report and recognize previous work done.
- Add to 3,4, and 5: added to the unified repository
- Add map librarians and State Library representative to consultation phase.

ACTION: Tanno will share the revised draft with the ULs before appointing the task force.

3.2. Task Force on Digital Visual Resources Planning

The task force is meeting today for the first time.

ACTION: UCD, UCI, UCR and UCSF, who do not have representatives on the task force, need to send Laine Farley the name of their campus liaison.

4.0 Access Integration

The discussion around the access integration reference model continued. SOPAG considered how to begin meaningful discussions on a campus level. The main question the campuses should discuss is: Is this model the future direction UC should follow in developing future applications? Is this what UC wants to provide to our user community? SOPAG will develop questions for

campus discussions, lead campus discussions, and be prepared to discuss the reference model at the Joint UL/SOPAG meeting in November.

ACTION: SOPAG will develop a set of questions to help conduct campus discussions.

5.0 Management of the SOPAG Website

ACG membership listing has been upgraded, and the CDL/UL structure document as been added.

ACTION: SOPAG should send Moody any suggestions for items to add to the SOPAG website or corrections to membership.

6.0 Workshops

There is money remaining for future workshops.

6.1. UC Digital Library Forum

A total of 95 attendees will be attending the forum on August 5, 2002 in LA.

7.0 Electronic Records Management

Tanno has talked to Charlotte Brown. She feels confident that she can represent SOPAG's concerns to this group.

8.0 Shared Collections Update

Bev French updated SOPAG on shared collections activities. The major principles CDL uses to negotiate licenses were reviewed. SOPAG agreed that the principles were still important to maintain. Some future issues: As UC moves away from always having a print copy, what is the University's role in serving the community in regards to ILL? What principles govern the removal of digital content? Does some re-education of the licensing principles need to take place as some Tier 2 licenses have been signed that don't conform to the principles? Should UC begin to look at student FTE for the appropriation of the budget? How should UC handle last print copy archives? This is especially important with potential budget cuts because bibliographers are not comfortable with canceling titles without knowing how UC is going to handle print archives.

Other CDL progress:

- Funded BePress and SPARC initiatives;
- Purchased UC Press titles from netLibrary.
- eScholarship paid the BioMedCentral membership fee (\$21,000) for UC. In BioMedCentral, a commercial publishing effort committed to open access model, authors usually pay \$500 to have an article included in BioMedCentral. With a UC membership, any UC faculty can submit an article without fees.

ACTION: French will send BioMedNet publicity to SOPAG for distribution/publicity on campus.

ACTION: SOPAG should let bibliographers know that they should tell CDL when open access materials are available so they can be cataloged by Shared Cataloging.

9.0 Dan Greenstein Visit

Dan Greenstein visited SOPAG and commended SOPAG and its groups on the work that has been accomplished. UC should consider on how to get message out about the work UC is doing in the arenas of shared collections and collaborations.

Next Meeting: September 13, 2002 at UCOP