

SOPAG Conference Call Minutes

Friday, July 28, 2006

Minutes revised 8/10/06; 1:5-PM

Recorder: Susan Starr

Attendees: Present: Bernie Hurley, Chair (UCB), John Tanno (UCD), Terry Ryan (UCLA), Kate McGirr (UCSC), Julia Kochi (UCSF), Patrick Dawson (UCSB and LAUC), Susan Starr (UCSD), Diane Bisom (UCR), Lorelei Tanji (UCI), Patricia Cruse (CDL)

Absent: Bruce Miller (Merced)

1. Agenda Review (no added items)

2.1 CDC

2.1.1 CDC Scenarios Development Task Force

The Task Force is continuing its work. Ivy Anderson has been added as a Task Force member

2.1.2 CDC Newspaper Task Force

Working on its charge. Will meet at UCI on August 11, 2006

2.1.3 UCAC Workshop Proposal

SOPAG discussed a proposal from the University of California Archivists Council to conduct an Electronic Records Management Workshop in conjunction with their fall meeting. The proposal had been endorsed by CDC. Discussion focused on the need to understand the appropriate and distinctive roles for libraries and records managers in handling electronic records. SOPAG endorsed the proposal.

ACTION: Hurley will seek approval from the ULs for the workshop and contact UCAC to share SOPAG's discussion and will ask them to add Trisha Cruse to the list of workshop participants.

2.2 SCO

SCO is continuing to work on their librarian toolkits. They recently discussed ways to make these more visible to campus librarians. Discussion of how to support FRPAA was also a topic for their latest conference call.

2.3 HOPS

2.3.1 Information Literacy Workshop Proposal

The workshop will take place on August 10. There are attendees from each campus.

2.3.2 Digital Reference Proposal

SOPAG discussed the proposal from HOPS to launch a systemwide digital reference service. HOPS is recommending implementing chat reference only, since this is the most highly used feature of most digital reference services. Co-browsing is less often used and is difficult to implement in the absence of all campuses using the same form of authentication such as EZ Proxy. Not all

campuses will contribute staff at this time, but the service will be available systemwide. SOPAG discussed the need for an evaluation plan.

ACTION: SOPAG members will make sure their ULs are aware of the proposal and support the cost (minimal) and staffing commitment (varies by campus). Assuming UL support, Hurley will inform HOPS of SOPAG's endorsement, including a recommendation that the CIG develop some goals that could be used to measure success. If ULs have concerns, the proposal will be transmitted to them for formal approval.

2.4 HOTS (John)

HOTS submitted a revised charge for a Cataloging and Metadata Common Interest Group (CAMSIG). SOPAG reviewed and approved the revised document.

ACTION: Tanno will let Jim Dooley (Chair, HOTS) know that the charge is approved and HOTS should proceed to identify potential members and vet them with their SOPAG representative

2.5 LPL (Julia)

Nothing to report.

2.6 LTAG (Terry)

2.6.1 Web Conferencing software: Dawson reported that they have had some progress on using the software and it is looking more promising.

2.7. RSC (Susan)

RSC is continuing to work on VDX and on revising Request screens.

3.0 Task Force Reports

3.1 BSTF

SOPAG was charged by the ULs to investigate options for moving ahead with the vision described in the BSTF report. As a first step in fulfilling this charge, Hurley and Ryan held a meeting with BSTF members, the chairs of HOPS and HOTS, Peter Brantley from CDL, and Jerry Persons from Stanford.

The meeting explored different mental models that would allow us to search across the entire information space. The ideal would be a "global access portal" (GAP) that would be a single interface across the entire academic information space, as defined by UC Libraries, based on a collection of harvested metadata from the entire information space. This "metadata mound" may not be doable today or workable today, but it remains a goal. Stepping back from this goal, the group discussed 4 metadata "hillocks". The first two appear to have the highest priority, as both urgent and viable.

- 1) **Son of MELVYL** Next generation discovery system for material now in our catalogs. This would be a new system, not just an expansion of the current MELVYL system. It would include metadata for material that is in the catalog now (e.g., not journal articles, but books, media, etc.) as well as equivalent material digitized as part of mass digitization initiatives. To be useful, any single interface would have to permit scoping by campus, format, etc.

- 2) **Journal Literature** Rather than constructing our own “metadata hillock” for journal literature, we should try to leverage the work of the Internet search engines (Google Scholar, Windows Live Academic)
- 3) **BearShare** We could integrate the metadata from repositories in which UC faculty can contribute and manage their data, including existing repositories such as the eScholarship Repository and new repositories for learning materials, research data, and the like as they are created.
- 4) **Specialized materials such as** digital content created/collected/managed by the UC Libraries that would not be included in one of the above systems.

The group agreed that the GAP will come and either we drive it or it will be thrust upon us. We will need to partner to build it and possibly to create the hillocks as well. Partners could include academic colleagues, publisher colleagues, Internet search engines, OCLC, etc. Our goal should be to partner with whatever community can provide the best product and will have the most appeal to our users.

Moving toward a single cataloging interface for creating “son of Melvyl” metadata was also discussed. Moving to a single ILS or a shared cataloging system would be a major endeavor. Treating OCLC as our single catalog system might be a viable alternative.

“Bringing service to where the users are,” another BSTF recommendation was identified as an area where there might be some low hanging fruit. Ideas included making sure everyone has library search box that can be imbedded in course web pages, implementing RSS feeds, making sure our services work in mobile computing devices, such as cell phones.

ACTIONS

- **Tanno** will ask HOTS to investigate whether OCLC could serve as a single cataloging tool for all campuses with all records being delivered to “son of MELVYL” and then being used by campuses.
- **Brantley** will start talking to Internet search engines to see if they are interested in integrating our metadata and developing partnerships.
- **Hurley** will discuss the current thinking with Dan Greenstein and Laine Farley, including the possibility of moving ahead on “bringing service to where the users are.” Then he and Ryan will develop a report for the September ULs’ meeting, including information on resource requirements.
- **Hurley** will send out the Wiki userid and password to SOPAG so members can read the complete minutes.
- **Ryan** will write a summary of the workshop and next steps for wider distribution.

3.2. RLF Persistence Procedures TF

The final report is complete. The final draft was sent to the SRLF Board and NRLF contacts for review, and their feedback is reflected in the final report submitted to SOPAG.

ACTIONS

- **SOPAG members** should let ULs know SOPAG is in process of endorsing this report
- **Hurley** will thank and discharge the task force,
- **Hurley** will send a transmittal letter to ULs saying procedures have been endorsed and will be put in place by Sept. 1 as planned.
- **Hurley** will have the final report posted on the SOPAG website.

3.3 ERMS Implementation Team (TC)

A small group (Farley, Brantley, Anderson, Martin, Cruse, and Hurley) met in early July to review the status of ERMS given delays by Ex Libris. Ex Libris is installing a consortial version of Verde at the Ontario Council of University of Toronto Libraries. This installation will give CDL an opportunity to view an installed version of the software prior to installing and testing it for UC.

4.0 Report on CDL Related Items

4.1 MELVYL

CDL is still trying to pin down timeframe for installing the new version.

4.2.1 VDX

SOPAG discussed the results of interviews conducted by CDL analysts at Berkeley, Riverside, Santa Barbara and Davis.

ACTIONS:

- **Cruse** will arrange for CDL to convene a meeting of ILL managers (one or two people) from each campus and an outside facilitator. The interview results will provide background for this meeting. The focus of the meeting will be to determine where we are now, how we should move forward, and what lessons we have learned that could be applied to future systemwide projects of this type. Action items coming from this meeting will be referred back to SOPAG for follow-up.
- **Cruse** will work with Patti Martin and Mary Heath to:
 - determine if there is functionality in the contract with FDI that has yet to be implemented, and
 - if there is additional functionality that the CDL plans to implement.

4.3 Friends of the library pilot project

This pilot project will provide the ProQuest Research Library to alumni and/or friends of the library groups. "Friends of the library groups" are defined as "donors and supporters of the Library at the ten UC campuses." Each campus will choose a) whether to participate in the pilot and b) to whom they would like to offer the service. Not all participating campuses plan to offer the service to Alumni. The initiative has been referred to CDC. Many campuses indicated that their HOPS representative is managing the initiative.

4.3 Access/Viewing in the DPR

There is consensus that it is permissible for metadata in the DPR to be exposed so that authorized individuals at each UC campus can see what other campuses have deposited.

Campuses will need to sign submission agreements before depositing material in the DPR. CDL is proposing that campuses sign three different agreements allowing 1) permission to preserve, 2) permission to redistribute, and 3) permission for access and preservation. Then for any deposit, the campus would merely have to indicate which of the agreements on file applied to each group of objects. Further email on this will be forthcoming.

5. Systemwide Library Planning

Nothing to report.

6. Shared Collections and Services

Nothing to Report

7. SOPAG communications

7.1 Web design

Nothing to report

8. Copyright support for UC Libraries

ACTION: Cruse will determine if someone was assigned to follow up to the document reviewed by the ULs in May.