

HOPS Meeting April 2, 2004

Head of Public Services (HOPS)
April 2, 2004
110 Langson Library
University of California, Irvine
10:00 am – 3:00pm

Present: Bob Bellanti (UCLA), Carol Hughes (UCI), recorder, Laine Farley (CDL), Gail Yokote (UCD), Patrick Dawson (UCSB), Donald Barclay (UCM), Cheryl Gomez (UCSC), Gail Persily (USF), Susan Starr (UCSD), Catherine Soehner (LAUC), David Rios (UCR), Isabel Stirling (UCB), chair.

AGENDA

I, Introductions

Patrick Dawson attended for UCSB in Marilyn Moody's place

II. Announcements

Several staff retirements were mentioned. David Rios mentioned that the current plan is that he will become AUL for Administration at UC Riverside sometime after July 1.

III. Selection of incoming Chair of HOPS

Don Barclay, Merced, will be the next Chair of HOPS. He will begin a 2 year term at the conclusion of this meeting. The agenda setting team of Laine Farley, Cheryl Gomez, and Marilyn Moody will continue in that capacity.

IV. Common Interest Groups (CIG's) Updates:

- a. Process for selection and appointing a LAUC rep to the CIG on Information Literacy. (SOPAG request)
- b. CIG on Web-based services. Metasearch initiative and campus participation. (Farley)

Hughes reported that LAUC has been asked to draw a slate of names for the ULs to choose from for the Information Literacy CIG representative. It is not usual to have a LAUC representative to a CIG, but this group will be an exception. The proposal for a "mini-immersion" workshop from the Information Literacy CIG, as modified from comments at the September HOPS meeting, was distributed in print at the meeting and via email. After a comment period, it will be forwarded to SOPAG by Cathy Palmer for consideration.

After a thorough discussion of the state of the Web-based Services and Digital Reference CIGs Farley decided that she would request specific contacts as-needed to assist in the Metasearch Initiative rather than ask that it be assigned to either group. As part of this initiative, CDL plans to develop metasearches for CDL-licensed databases and allow campuses to develop their own metasearches using the CDL-licensed tool. Currently CDL is planning two beta tests of the soon-to-be-licensed metasearch software; a "core collection" aimed at undergraduates (UCSC and UCLA) and a research portal (UCLA) aimed at a single department. For more information go to: <http://www.cdlib.org/inside/projects/metasearch/> . Contact Laine if your campus would like to develop a portal as part of this initiative; campuses can participate in the beta test now or wait until full implementation.

HOPS will recommend to SOPAG that it consider a) the use of task forces with specific assignments and deadlines, rather than the appointment of CIGs and b) the establishment of CIGs with open membership to promote information sharing across campuses from diverse staff perspectives. These CIGs may want to meet in the north and south on a regular basis, budget permitting. Don Barclay will convey the tenor of HOPS' concerns to the Digital Reference CIG Isabel will contact Julia Kochi as chair of the Web-based Services CIG. CIGs will be asked to forward to HOPS any specific issues that they want to address.

V. RefWorks/Endnote discussion (Stirling)

This web-based tool is simpler than EndNote and more portable since the database is centralized at the vendor. It has become a successful tool for UC Berkeley undergrads during the past year. Concerns about security of the database and confidentiality/privacy need to be answered, but the primary inhibitor is the pricing. Laine will ask Wendy Parfrey to approach RefWorks and begin a negotiation.

Side issue: HOPS will recommend to LTAG that it explore establishing "guest" authentication for all UC faculty to campus wireless networks without the need to have a formal visiting relationship. This would promote use of wireless and other services as faculty travel within UC.

VI. HOPS and Ed Tech. (Farley)

- a. SOPAG recommended investigating links between our libraries and campus educational technology groups such as the UC Teaching, Learning and Technology center, as work on information literacy continues.
- b. Discussion of the report from the UC/CSU video conference on Sakai project (<http://ets.berkeley.edu/etstandards/sakai/>)
- c. Discussion of how/whether libraries are working with their Ed Tech groups on campus.

In support of SOPAG's interest that HOPS investigate links between libraries and instructional technologists, Hughes will explore how to establish a BOF session at the next UC Computing Services Conference to be held at UCR August 1-3 (<http://uccsc.ucr.edu/>)

VII. Electronic Resources Management Meeting (March 11-12): Public service implications. (Farley, Hughes)

A report from Farley, Hughes, and Barclay led to a discussion of a pressing need for the ERMS to deal with urgent license negotiation needs. However the interests of public services was well represented at the conference. HOPS members should track this initiative and contact TF members with their ideas.

VIII. UCeLinks.

- a. Concerns regarding slowness
- b. Request for change in Citation Linker, i.e. remove link to MELVYL from the article request UCeLinks box that appears after using the Citation Linker form to request an article.
- c. Encourage patron self-service functionality in VDX as it allows patrons to view ILL check-outs, sort requests by due date, etc.
- d. Other uses of Citation Linker (Farley)
- e. Other potential services for UC-eLinks (see <http://www.cdlib.org/inside/projects/uc-elinks/principles.html> for principles and <http://www.smugnet.org/sfx/sfxservices.htm> for examples of services implemented by others) ; how to get feedback (Farley)

Processors were upgraded and a new system for security/backu led to an improved environment for the SFX server and other essential services. Farley asked for immediate, specific, and detailed problem reports since CDL can not perceive slowness out in the network from logs.

CDL has developed the capability for all campuses to include a search of their local catalog through UC eLinks. Farley will send HOPS some interface design options for allowing users a choice to query either MELVYL or the local catalog after the Citation Linker form or from the regular UC eLinks window. Some institutions are putting Citation Linker on their webpages as a query box for their e-journals list. Also, Web of Science citation indexes could be queried by UC eLinks or after a search through Citation Linkers. Again, if some e-links providers do not work well, send comments to CDL though the "Report a Problem" page on CDL Inside (<http://cdlib.org/inside/help/>). Farley will bring suggestions to new UC eLinks services to HOPS for priority recommendations and send HOPS examples of how other institutions are using Citation Linker.

CDL is investigating Fretwell-Downing's Zportal (which came with the VDX contract (<http://www.fdusa.com/products/zportal.html>) as the infrastructure to support patron queries about the status of an ILL, to renew an ILL, to pick up desktop deliveries, And to use a citation linker alternative. Zportal is being explored because the VDX interface will not support renewals, one of the requirements specified by the Request Team.

The question was raised as to whether we should/could use SFX since we have already developed a good interface for that product. Farley will explore further.

The PID server will be moved to the "failsafe" (aka fail-over) cluster to provide greater reliability. However HOPS also concurs that UC should explore a move to Open URLs since they are so widely adopted by publishers and require less maintenance locally/regionally.

IX. SCP records for shared collections. SOPAG request to poll campuses:

- a. Are campuses planning to add the SCP records for UC Shared Collections to their local online catalog
- b. If so what rationale is being used.

Most campuses have not yet had discussions about loading SCP records. UCSD noted that rationales *against* loading shared collections locally include the fact that other RLF collections are not in local catalogs and these items are all owned electronically for better access anyway. UCD pointed out that loading these records would mean 3 records for he same item in local catalogs. Farley noted that if campuses do decide to load the records locally, they should not be sent to MELVYL in update loads.

Isabel will ask SOPAG to clarify their question to us regarding loading shared print collection records in local catalogs.

X. Combined service desks.

- a. Staff training issues when combining Reference/Info with Circulation
- b. Staffing economies, other savings
- c. Service implications, what makes it work, tips for success?
- d. Dealing with controversy, staff-buy-in etc. (Persily)

Generally, smaller libraries have had success with combined service desks, although training is an issue. In all libraries scheduling diverse staff among a number of service points is a challenge with which technology like IM or RFID or pagers can assist.

Other issues: The practice at CDL of referring reference questions from the general public to their local library, wherever that may be, was confirmed as a best practice.

The next HOPS meeting will be in Oakland at CDL on September 21, 2004

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