

**HOPS
Conference Call
March 26, 2009**

Present: Cowell (SC), DeDecker (SB), Frenkel (R), Friedman (SD), Hughes (I), Kautzman (D), Meltzer (CDL), Palmer (LAUC), Persily (SF), Stirling (B), Watstein (LA)

UC-eLinks usability testing after direct linking brought in update – Meltzer

CDL did usability testing of linking within a window at UCB. The report is being vetted right now at CDL and is expected to come out later. Generally, users liked direct linking. It was a big success in terms of getting to items more directly and quickly. There are a few minor changes needed to the interface to improve user experience. CDL is using users' mental models to identify how to change the user workflow. There are still some issues with specific vendors but they working with them. They are doing some internal programming to solve some vendor connection problems.

Print on Demand Working Group update – Meltzer

The WG has been underway for a few weeks now. They are working on assumptions, principles and UC desires and needs. They will be meeting with vendors next month and talking to other institutions (Cornell MI) about their experiences. The WG report is expected by the end of May.

Confluence update – Meltzer

Ellen has been bugging everyone at UCOP/IR&C about Confluence. It is not officially up yet. HOPS could have a site now, but we would have to manage ourselves. HOPS would need to make some decisions before can start up. HOPS agreed we should set our site up now. Since Gail has experience with Confluence, she will help to set the framework. For organizing the set-up, Ellen will copy Gail and Catherine as she works with IR&C at UCOP.

RefWorks update - Meltzer

Wendy talked to them yesterday. RefWorks is now part of ProQuest and remains a pretty expensive product. Cost for the services is FTE-based. There are some discounts being given to UC libraries, but they are due to them signing up early. All but Berkeley are also using RefShare. According to Wendy, RefWorks said if all UC libraries subscribed to RW, then new users would get a 30% discount, though existing subscribers would get nothing beyond their current discounts, which range from 15%-32%. If some campuses additional campuses subscribed, they would get a 15% discount, though there would be no change for existing subscribers. UCI is currently doing an assessment of RefWorks and their person, Danielle King, is available to share the criteria they are using for assessment of the service. Catherine plans to write up something that will ask RW about their subscription and discount costing models. If this is shared, Ellen can pass on to Wendy to do additional negotiations, if that seems desirable.

NGM – Kautzman

Comments on non-UC Libraries in NGM:

- Amy appreciates and is thankful for HOPS' quick, recent work on which library records to include in NGM. She will be sharing all campus responses with full comments with CDC and HOPS. There were consistent concerns with GTU's representation. Others felt that the State Library was important, as did some concerning the California Academy of Sciences.
- The NGM group is working to get statistics on just how many of these titles are singular and not represented in any UC library. We have a working list of percentages and need to package and distribute it. It will, however, not be absolutely correct – records that don't match won't merge making it appear as if there are more individual titles than really exist.

- At this point it is unknown how expensive it would be to place these records in WCL as a UC holding. They are currently listed on their own.

Continuing information sharing: The Imp team asked HOPS if there was any interest in a series of virtual road shows, allowing for a virtual back and forth conversation as we get closer to going live. HOPS expressed interest feeling it would be a low impact test for a new way of communicating across campuses.

Critical Mass:

- Shared with HOPS the ongoing conversation of “what is enough” to go live? What is the percentage of materials necessary within NGM to reach critical mass, when we can go live?
- There was also discussion about planning for the inclusion and work that has to happen concerning affiliated libraries.

Ongoing NGM discussions: Amy and Ellen shared a number of ongoing topics the Imp Team is addressing, they, in part, include:

- Reclamation projects
- SCP records and RLFs
- Affiliated libraries
- Non-UC libraries, inclusion
- Critical mass for going live
- Best practices for updating records, reporting errors, updating campus configurations, enhancement requests
- Structure after pilot is over (CDL and campuses move into place, IMP Team is dismantled)

NGM - Meltzer

Discussed pending release of Request, displaying results from two systems at one level, and improving LHR data display for performance and user experience in large serials.

Digref Meeting @ UCLA - DeDecker

Needs HOPS to support this service on each campus and would like each AUL to emphasize their support of the service to their own staff - makes it easier to staff the service. SD will share sample questions from 24/7. We start staffing the 24/7 on Monday. OCLC is looking at text messaging options.

Digref stats – DeDecker

So that these useful stats can be shared, would be useful to have an Exec Summary. SD will put together an Exec Summary for these stats and ask Ken to put together explanatory notes for the stats.

Library teaching activity – Watstein

SW would like to start a conversation about how stats are compiled - even using ARL as the definition for what we collect. It would be useful to all to understand what we count, especially if we want to go beyond ARL to count what we do. SW will formulate some questions and we will put this as a discussion item on our next meeting's agenda.

Document owner: **Donald A. Barclay**

Last reviewed: April 13, 2009