SOPAG Digital Reference CIG - Minutes
Minutes - January 9, 2003

Members Present: Joe Barker (UCB), Patrick Dawson (UCSB), Heather Tunender (UCI), Ken Firestien (UCD), Donald Barclay (UCM), Alice Kawakami (UCLA), Frank Gravier (UCSC), Susan Jurist (UCSD), Vicki Bloom (UCR), Peggy Tahir (UCSF), Roy Tennant (CDL).

1. Joe Barker was elected to Chair this committee.

2. Committee briefly discussed the charge to the committee and the goals and objectives as outlined by SOPAG.

3. Committee members introduced themselves and provided information regarding the status of digital reference on their campuses.

Campus Reporting:

UCSD   Currently not providing digital reference. A committee had investigated and put forward recommendations but no action has ensued

UCLA   Currently providing digital reference using 24/7 (eGain) software (several libraries participating). Library running the software on server provided by MCLS to test how to solve proprietary database problem. Digital reference sessions are conducted from offices.
                    Hours: M-Th 11am-9pm, F 11am-5pm

UCD   Currently providing digital reference using 24/7 (eGain) software (Health Sciences and Veterinary Science Libraries). Digital reference sessions are conducted from service desks.
            Hours: M-F 10am-5pm

UCI   Currently providing digital reference using 24/7 (eGain) software (all three campus libraries participating). Library running the software on its own server.
            Hours: M-Th 10am-6pm, F 10am-3pm

CDL   Currently not providing digital reference. Roy Tennant serves on Docutek Advisory Board (produces a live ref system).

UCB   Currently not providing digital reference. Libraries have been exploring digital reference for three years and have their own server for use of 24/7 (eGain) software. Librarians ran a 3-month/8 hrs per week test of the software and at end of testing period did not conduct a live pilot project due to the instability of the software and technical problems encountered.

UCM   Currently not providing digital reference. Campus scheduled to open Fall 2004 with 5 FTE library staff. Interested in digital reference possibilities. Donald Barclay tested Convoy digital reference software at his last job.

UCSF   Currently not providing digital reference. Peggy Tahir has written a draft plan for digital reference and forwarded to current acting head of Public and Information Services. With opening of new campus at Mission Bay, the Library is interested in exploring digital reference as a way to reach patrons in remote locations.

UCSC   Currently not providing digital reference. Development of digital reference service is included in the Library's list of projects for 2003/2004.

UCR   Currently not providing digital reference. Library acquired a test account for 24/7 (eGain) software but has not tested.

UCSB   Currently providing digital reference using LSSI (eGain) software. Digital reference sessions are conducted from service desks (when double-staffed) and from offices.
        Hours: M-F 9am-5pm

4. Committee developed a list of features essential or desired in a digital reference software package.

Digital Reference Software Features List

§   Chat
§   Page pushing (cut & paste)
§   Escorting
§   Co-Browsing
§   Form sharing
§   Voice over IP
§   Video/photo capability
§   Conferences, classrooms
§   Pointer tracking synchronicity
§   Synchronized scrolling
§   Text highlighting
§   User authentication
§   Integration with local proxy server/VPN
§   Desktop access (ability to access computer desktop, show other programs, etc.)
§   Application mirroring (ability to show one application; i.e., how to download into EndNote)
§   Reliability
§   Session transcripts to users
§   Server logs
§   Statistics
§   Ability to work using multiple browsers
§   Ability to work using multiple operating systems/platforms
§   Use ASP or local server
§   Ability to write scripts (shared or local)
§   Ability to store common URLs, bookmarks
§   Alert agent when call comes in (possible advanced feature to transfer alert to pagers, cell phones etc.)
§   Vendor has good customer service and training
§   ADA compatibility
§   Queuing of additional patrons
§   Pop-up questionnaire
§   Customizable patron interface (by patron)
§   Customization of screens by agent
§   Branding capability
§   Patron anonymity

5. Action items were agreed upon.

Action Items

§   Roy Tennant will set up two listservs: One for the committee, and one to be activated at a later date for communicating campus-wide

§   Peggy Tahir will write up the minutes, including the list of digital reference software features and send to Joe Barker to be distributed to the committee members

§   Vicki Bloom, Patrick Dawson and Frank Gravier will investigate ARL libraries working consort ally to provide digital reference services and report back to the committee with information concerning software, staffing, challenges and successes in their ventures

§   Susan Jurist will develop a website for the committee. The URL is http://orpheus.ucsd.edu/csj/drcig

§   Susan Jurist will post members names and email addresses, and links to guidelines and competencies for digital reference already in place at UCLA and UCI to the website

§   Committee members will review guidelines and competencies for digital reference in place at UCLA and UCI

§   Committee will examine current digital reference software, relative to the list of desired features and invite a number of vendors to demonstrate their software to the committee (host a 'software forum')

§   Committee members will email Joe Barker with any dates they will be out of town for meetings, etc. during the next several months to aid in planning future meetings

6. Committee members discussed possible future meetings. CDL was selected as the location for the next meeting (to be scheduled later in February or March).

Respectfully submitted,
Peggy Tahir