

## **Systemwide Operations and Planning Group (SOPAG)**

### **SOPAG Meeting, June 21, 2002, Action Minutes**

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

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

**Absent:** G. Yokote

## **1.0 CDL Report**

### **1.1 Melvyl Transition**

*Announcements:* The Melvyl-T demonstration system with 630K records will be released for public viewing on July 1<sup>st</sup>, 2002. Another version of Melvyl-T with 24 million records has been created and will be used for performance testing. The display of UCD circulation records in the current version of Melvyl has been activated. UCSB circulation records will also soon be displayed in the current Melvyl system.

*Non-UC Records:* The initial production version of Melvyl-T to be released this fall will include monographic records from the UC Libraries, UC Affiliated Libraries, Lawrence Berkeley Lab, Lawrence Livermore Lab, Hastings, the California Academy of Sciences, the Center for Research Libraries and most likely, the California State Library (a strategy to load CSL records is currently under development).

Loading serial records from the California Union List of Periodicals (CULP) is also under development, but due to complications, no time frame for loading has been announced.

*Records Improvement Projects:* The CDL is creating a template that will itemize the management information it needs to collect, in order to monitor these projects.

**ACTION:** Ober will e-mail the template to the campus SOPAG representatives when it is ready.

*Melvyl Brief Record Standard Review:* Tanno sent the charge for this activity to HOTS

*Single vs. Multiple Records for Materials that have a Print & Digital Version:* The Shared Cataloging Steering Committee is working on this issue for monographs, as there already is a UC standard for serials.

**ACTION:** Tanno will contact the Steering Committee to request that they: 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 to be transitioned are in service or being tested. SOPAG will be asked to discuss and evaluate options for using the UC e-Links service with campus licensed materials.

**ACTION:** Ober will have the e-links discussion materials sent to SOPAG in time for the next meeting. Ober will also e-mail SOPAG the schedule to be used by the CDL for sending the final two "linkout" updates to PubMed.

**1.3 Digital Preservation Update:** A job description for the Director of the Digital Preservation Repository is under development.

**1.4 Request/Desktop Delivery:** RSC has commented on the Consortial Borrowing System's "Principles for Implementation" document.

**ACTION:** Ober will forward the document and comments to SOPAG via e-mail for future discussion, endorsement, revision, etc.

**1.5 CMI Update:** First & second quarter CMI data will be available soon on the Web. The call for third quarter data will go out soon.

**1.6 Counting California:** CDL has offered to visit the campuses to discuss Counting California – its goals, possible campus participation, etc.

**ACTION:** Ober will supply SOPAG members with a list of possible dates; P. Cruse and campus staff will schedule visits.

**1.7 JSC Update:** The UC Libraries' Elsevier Science subscription contains journals not held by any campus. Therefore, there are no catalog records for these journals in Melvyl.

**ACTION:** Ober will report to Bev French that it's SOPAG's preference to have the Shared Cataloging Program catalog Elsevier journals not held by any campus. SOPAG recognized the need for campus loading of new records for the materials to appear in new Melvyl (assuming the CDL holdings location is removed as is being discussed.)

## **2.0 All Campus Groups**

**2.1 SOPAG Policies on Web Presence and All Campus Group Task Forces:** SOPAG reviewed the draft document on this topic.

**ACTION:** Tanno will update the draft document to clarify that new members appointed to Common Interest Groups must be cleared by the appropriate campus SOPAG representative.

**ACTION:** SOPAG decided to re-institute a SOPAG Web Editor, who will ensure all appropriate materials are posted to the SOPAG Web site in a timely manner. Moody volunteered to be the SOPAG Web Editor. UCB will continue to provide Web site technical support.

**ACTION:** Bunting will send her spreadsheet listing All Campus Membership to SOPAG members. They will fill in the names for their campuses, and return to Moody. Moody will see that this information is compiled and posted on the SOPAG Web site.

**2.2 Hops Charge:** The draft charge provided by HOPS was discussed. SOPAG was impressed with the draft and commends HOPS for their initiative.

**ACTION:** Lessick will transmit SOPAG comments back to HOPS.

**2.3 Digital Reference Common Interest Group:** The HOPS draft charge for this CIG was discussed.

**ACTION:** Lessick will transmit SOPAG comments back to HOPS.

**2.4 Circulation Advisory Group Blocking Proposal:** The CAG has proposed a process that could be used to block circulation privileges for UC borrowers who abuse these privileges at campus libraries, other than their home campus. Privileges could be blocked at both the home, as well as other campus libraries. The Resource Sharing Group endorsed this proposal.

**ACTION:** SOPAG members will take this back to their campuses for final input, after which, a decision will be made.

### **3.0 Task Forces**

**3.1 Government Documents:** SOPAG discussed the draft charge and concluded that a two step process is desirable. The first step's charge will focus on identifying a framework for the "Unified Government Publications Repository." This will be a smaller task force that will consult widely to understand the issues surrounding the unified repository. It will then recommend one (or more) options that frame how the unified repository should be built, the services it will provide, etc. After the framework(s) are widely reviewed and the ULs have endorsed an approach, a second task force will be charged to implement the Unified Government Publications Repository.

**ACTION:** Tanno will draft the charge for the first task force.

**3.2 Digital Visual Resources:** The charge for this Task Force is approved and members have been appointed.

**ACTION:** UCD, UCI, UCR and UCSF do not have members on the Task Force and therefore, will appoint liaisons to coordinate the survey of visual materials called for in the charge. The SOPAG representatives for these four campuses will send their liaison's name to Lane Farley.

**3.3 Privacy Task Force:** SOPAG approved the charge for the Library Privacy Liaisons (LPL), a new all campus group. It also approved the charge for the Library Technology

Advisory Group's (LTAG) new task to develop guidelines for the retention of UC Library systems records.

**ACTION:** Tanno will send out the charge to LPL, once the membership has been finalized. He will also send the LTAG charge to that group's Chair. Dearie will request that LAUC submit a slate of 3 candidates to be forwarded to the University Librarians for final selection of the LAUC Representative to the LPL.

#### **4.0 Access Integration**

Yet another interesting discussion around the draft SOPAG paper on this topic.

**ACTION:** Hurley will revise the paper based on suggestions from SOPAG members. Bunting will propose a process to have the paper reviewed and comments collected.

#### **5.0 Management of the SOPAG Web Site**

See 2.1 – SOPAG Policies on Web Presence and All Campus Group Task Forces.

#### **6.0 Workshops**

**UC Digital Library Forum:** The Digital Library Forum proposal was approved for August 5, 2002 at LAX.

**ACTION:** SOPAG members will send the names of their attendees to Ober by July 17th.

**Next Meeting:** July 26, 2002 at UCOP

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