

## **Lunch with LAUC**

September 6, 2001; notes last revised: 10/2/2001

Meeting convened: 12:05 p.m.

Presenters: Maureen Russell (LAUC-LA President), Alison Bunting (AB), Janice Koyama (JK), Terry Ryan (TR), Cindy Shelton (CS)

Present: Jenifer Abramson, Elaine Adams, Adrienne Adan, Ellen Broidy, Valerie Bross, Patti Caravello, Janet Carter, Xia Chen, Diane Childs, Norma Corral, Sharon Farb, Leon Ferder, Cheri Folkner, Jan Goldsmith, Miki Goral, Ruby Gutierrez, Judith Herschman, Laura Horwitz, Julie Kwan, Rhonda Lawrence, Marsha Kmec, Lorelyn Lewis, Joan Flintoff LoPear, Roberta Medford, Luiz Mendes, Alan Michelson, Caroline Miller, Michael Oppenheim, Greg Padilla, Kate Pecarovich, Roxanne Peck, Paul Priebe, Kati Radics, Jean Rashedi, Angela Riggio, Barbara Rudich, Barbara Schader, Sharon Shafer, Brent Singleton, Lise Snyder, Ray Soto, Louise Spear, Libby Stevenson, Rita Stumps, Ken Wade, Hannah Walker, John Wilson, Sharon Wiskoff, David Yamamoto

### **Part I: Presentations**

Maureen Russell welcomed the audience and opened the session.

First, Alison Bunting introduced the panel. Cindy Shelton, Janice Koyama, and Terry Ryan summarized their involvement in the Electronic Resource Database (ERDb).

Shelton: In November, 1999, Collection Management Council began discussing the need to manage and control electronic resources. Given CMC advice, Cindy convened a task group on how to manage e-resources. The task group turned in a report in spring, 2000. Among other things, the report recommended creation of a digital acquisitions database leveraging the work of David Yamamoto. Cindy Shelton took this to Terry Ryan. In fall, 2000, Terry Ryan, Steven Schwartz, Sharon Farb (Digital Acquisitions Coordinator), and Cindy Shelton met and discussed the database. Cindy created a Digital Acquisitions Database (DAD) task force to design the database, chaired by Sharon Farb. Many policy questions cropped up; Cindy appointed the Digital Acquisitions Advisory Committee (DAAC) under Lise Snyder to review these questions. In winter/spring 2001, DAAC came to Cindy and CMC with recommendations regarding the policy issues.

Koyama: In February 2000, Koyama created an Online Users Service Committee (OUSC) to review the library web site. The charge to OUSC included coordination of the library web site, promotion of user access and consideration of the library OPAC. One question OUSC addressed was: Could we do something quickly to address concerns, or should we fold concerns into long-term plans? In Sept. 2000, the OUSC submitted a report recommending an approach to library web redesign and a recommendation to hire a consultant. Koyama decided to take a compromise approach. First, she decided to hire a consultant for user testing, development of a graphic design, and delivery of documentation to maintain the web site. Second, she set up a Web Project Team consisting of Steven Schwartz, Dawn Setzer, and David Yamamoto to shepherd the process, along with a Steering Group and Audrey Jackson. The Web Project Team submitted reports to AdCon October 2000, February 2001, and August 2001.

The Web Project Team recommended (July 2001) that an electronic resources database be used to generate library web pages.

Bunting: The AULs planned a half-day retreat to consider the DAD report, the Web Project Team report, and several white papers from the Digital Library Federation. Among the questions considered by the AULS were: What is the relationship between the library web pages and the library OPAC?

The AULs decided to combine the acquisitions database recommended by DAD/DAAC and the public service database recommended by Web Project Team in a single Electronic Resources Database (ERDb). The AULs also decided to make the ERDb available to the public by the fall quarter. The AULs brought these recommendations to ExComm as an interim step. Then AdCon held a planning session. As a result, the AULs decided to move forward with ERDb in August and "to be on the road" in October.

Ryan: In LIS, our role is to implement this short term strategy. We decided that all of the information [i.e., data elements] was already in the DAD database, other than (a) [discipline] subject areas and (b) [genre] types. We decided to stagger migration for cleanup. First, David Yamamoto and Darrow Cole scraped information from library web pages and Andy Kohler created records. Sharon Farb was asked to pull together people to train everyone to clean up the results. Second, at the end of September, LIS will extract serial bib records from Taos, and de-dup and combine these Taos records with records from the Biomed Database.

This has been a fascinating process. The positive aspect is that we need as a library to engage in a debate. This business has raised a lot of questions.

Bunting: The ERDb will not replace what is currently available as unit's web pages but will provide access through the ERDb. As part of long-range planning, we will talk about long term issues.

## **Part II. Questions & Comments**

Julie Kwan (PSRML): The central database does not include all resources.

AB: That database will be available. So, you could click on a unit's page and then execute a search.

Miki Goral (RIS): Aren't you putting the cart before the horse? I am concerned about releasing to the public something that has not been tested. And release to whom? I am very disappointed that the Reference Collection online is not available from the first page of the library web site. Moreover, if the ERDb is similar to the CDL directory, then this is something we have rejected (in RIS). These questions really need to be discussed [before the ERDb is implemented].

Regarding the [Web PT] Plan, I was **never** consulted. We are the primary contacts with the public; why were we never consulted by the consultant?

JK: The consultant was charged to develop and devise a method to gather user input, to develop an architecture, to prepare options for graphic design, and to develop documentation for maintenance of the library web site. The consultant completed the survey, the architecture, the graphic design. The documentation has not yet been completed.

Judy Herschman (Arts): Some of the conclusions based on the user survey were faulty. For example, the report concluded that staff does not use the home page; but we were asked not to fill out the survey. So, the part of the report concerned with usage of the home page is faulty.

AB: To see how this ERDb works, the decision when to release the ERDb--this is an evolving process. Unlike Orion2 we have control over when to release. We want to release this in the fall quarter. Starting next week, 13-14 librarians will begin to work with the database. At the same time, I believe we may have samples of the search interface. We have a goal of fall to make. This is not a hard & fast goal. If it is critically important for users to search for reference works, that will be simple to accomplish. This is going to be an extensive process.

Kati Radics (YRL): This idea started from a need to redesign the library home page and ended with a proposal of the ERDb. Did the experts include the Catalogers? Why not use the OPAC?

TR: Good question. If you look at where we are now, why do we have lists? The fact that we are reacting to is an existing condition. The survey at least gives a handle, lets us get a clear idea of what goes on. Functions are handled better in a database than a web page. The DAD (digital acquisitions database) is difficult to replicate in the catalog, leaving aside our not having an acquisitions system. We could debate the time it takes to update information [in Taos]

Barbara Schader (Biomed): First, the Biomed Electronic Resources Database [mentioned by Terry Ryan] has never been an acquisitions database. Second, when you debate the time it takes to update information will you also discuss the time needed to merge records?

Rhonda Lawrence (Law): Terry, one problem has been a lack of understanding about what catalog records can do and how information is maintained. For example, [serials] catalogers do maintain information on current publishers. Moreover, among many other changes, the new Chapter 12 rules will provide catalogers with the ability to maintain this information through the 260 field.

I am sympathetic to Acquisitions needs--to the need for a separate database for licenses. The [Taos] catalog cannot help with that. But the crossover--what we need for the public--is a different matter.

ACC met with Steven Schwartz. At that time, I looked at the web sites that he recommended. I was appalled by the UCSD [Sage] database. For example, there are screens and screens of records listed under "California Documents" as "annual reports." ACC was consulted only in the sense that Steven Schwartz told us what Web PT planned. We informed him how Taos records could be used. We explained that e-resources could be found in the OPAC right now by entering "subj online resources AND subj [term]"  
The types of searches may be general ("online resources AND law") or specific ("online resources AND contracts" ).

In contrast with UCSD's database, the UCLA web pages are very selective. Rather than thousands of sites, one retrieves a page with selective headings. I am concerned that [the wholesale merging of bib records into the ERDb] will result in a UCSD-like database. The problem is compounded by the ERDb subject terms. Some of the terms, e.g., "Law" will retrieve long lists of resources; other terms will retrieve 3-4 records. The organization of this database needs to be thought out more.

TR: [Clarified that Taos monograph records would not be brought into the ERDb; only the Taos serial bib records would be brought into ERDb. Also clarified that Law library web pages were not "scraped" for the ERDb]

Libby Stevenson (ISSR Data Archive): We maintain resources in Orion2 to have a solid bib record. But that's not the only way people look for things. The kind of access needed for statistical materials is not adequate through LCSH, so we needed to design a new thesaurus. We maintain another database with material that cannot be maintained in a catalog. I offer this as a perspective--there could be good reasons for multiple databases.

Lise Snyder (College): The original database, as it was defined for selection, acquisitions, & problem tracking has a great deal of value. As to whether a separate database is needed for public access, I have many concerns. First, the time table is problematical--and artificial. The fall quarter is our busiest time; we need this time to get ready. Second, the amount of cleanup required for adequate basic information is massive and time-consuming. There's a lot to be done in three weeks, by librarians who are about to start the busiest part of their work life. Why does the ERDb have to be up by the end of September? It doesn't have to be this way.

CS: But, what if we come to October 1<sup>st</sup> and we have done it? Frankly, I was arguing for delay; but now I think we should go ahead with it. Each unit is responsible for determining how to complete the work. We had a YRL meeting with clients to discuss this. We've worked out a way for this to be centered in Cataloging. If it doesn't work, the users will let us know.

AB: The data in the ERDb is coming from the library web pages that are displayed to the public. If there is a problem with the ERDb, then there is also a problem with the library web pages.

Lise Snyder (College): Strictly speaking, that is not true since the "scraping" process introduced HTML fragments into the title field, etc. of ERDb. This garbage is not part of the library web pages; but it went into the migration. The problem had to do with how the information was migrated.

Barbara Schader (Biomed): Cindy, I'm looking at this from a political point of view. Orion2 damaged library credibility. I'm concerned about releasing something to the public that is not ready. I'm not certain that it would be advantageous to us to look incompetent. The workload is way to huge to be completed in time; so there may be political fallout.

Judy Herschman (ART): We have not addressed issues of importance. The ERDb represents an incredible amount of work--is it the most effective method? The ERDb puts our web pages into broad categories. But, we should consider an enhanced database other than from just the library web pages. Many entries on library web pages lack annotations. Why not analyze the problem, consider something like CORC records, that resemble cataloging?

There are other sources of e-resource records. Infomine, for example, has much finer terms and descriptions.

AB: It is interesting to hear about new developments. There isn't a broad understanding of cataloging. There have been a lot of changes. It would be wonderful if there were a LAUC session on that. I would go.

Rhonda Lawrence: This is **not** 5-7 years ago; we have many outstanding examples of library web pages. I am concerned about our popping up with a "UCSD" look. For us to come out now with a database with so few subject terms, so many resources, we will look amateurish. Someone, not catalogers, decided that we would use disciplines. What we come out with must look well organized.

TR: There are about 5,000 electronic resources. We don't have firm numbers.

AB: We need to keep in mind various user approaches. Most users are going in by title for journals. The ability to search by serial titles will facilitate these searches.

Miki Goral (YRL RIS): This is mixing things. Regarding journal titles, the OPAC is supposed to show which journals we own. Regarding the ERDb, if it is like the CDL directory, we are re-creating something that people did not like to begin with. My concern is that we are in too much of a rush to release this to the public. Why not wait--release it as a Christmas present?

Rhonda Lawrence (Law): As a technical clarification, if we cataloged a title, that title displays to the public.

TR: One issue is to get it cataloged. The fact that we are creating a separate database should tell us something.

Janet Carter: Orion2 catalog records, **not** just brief records, need to be included. Moreover, the current strategy of just putting everything in together--the "scraped" resources, journal titles--needs to be considered.

TR: Where does the data come from? Should the data be replicated? We need to share information in the ERDb only once.

Julie Kwan (PSRML): The arrangement of library web pages direct people to certain things. Many times, people do need information in a database--to have it all together in one place. The Web pages have selected resources.

JK: Even if the OPAC were pristine, we would still need to lead users to pathfinders or selected bibliographies. The web allowed us to present things easier and to change.

As to our scheduling a future meeting, we should discuss the future of the OPAC. The role of the Reference Librarian also needs discussion. Also, whether the ERDB is permanent is up for discussion.

Ray Soto: Reference librarians create pathfinders targeted for a specific purpose. Some pathfinders are developed in response to common questions from classes. For example, if your topic is abortion, then the resources you should use are....

What I'm hearing is that you will bring the URLs from the library web pages into a database. The primary divisions are only about 74 areas/departments, which produce lists in alphabetical order. But that won't work. Take for example "Voice of the Shuttle" --this could be on a page organized logically, chronologically, by authors, etc. This organization won't be replicated by ERDb.

Also, the 74 areas are too broad. Take "Until the Thunder Speaks." I would want to search under T.S. Eliot as a subject heading; but I don't get to do that--just "English"

TR: You could add more than one subject to the ERDb record and use keyword to generate a page. What are the organizing principles [for ERDb]? They are: (1) Type; and (2) Keyword. We need to discuss this.

JK: Many pages are pathfinders. The ERDb does not replace the web page--does not obviate the need for your page, I think.

Ray Soto (YRL): What about new pathfinders?

TR: You will need to create records in the ERDb and on your web pages.

Maureen Russell: Will there be funding for new positions for this duplicate work?

JK: We leave that to a management level. Our goal is to move away from static web pages. ERDb will allow us to move away from static web pages.

AB: It's not clear that it is duplicate work.

CS: A couple of principles need to be kept in mind. Phase 1 is rough. The goal is to provide access quickly. In terms of resources to help fund, I am going to help.

Janet Carter (Biomed): Have you considered the use of PURLs?

TR: We have no current plans for a PURL server. We would probably use UCOP--the CDL server for this. We would talk to them about that. We were talking about creating lists from the database. It is better for Ray to have the resources in the database--to have his page input into the database.

Janet Carter (Biomed): Have you considered the use of CORC?

TR: Excellent idea.

Judy Herschman (Arts): We don't want to use these general [subject] terms. We want the ability to access specific terms.

Ray Soto (YRL): May we come up with other terms?

AB: Come to the presentation on September 14<sup>th</sup>. It is difficult to envision the display. Within each unit, librarians will need to make a decision of whether to continue to do this duplicate work [of maintaining library web pages and ERDb]

Rhonda Lawrence: You have all been very brave. Thank you.

Adrienne Adan (Law): Thank you all very much. But I do want to say that one of the concerns has been the lack of communication at an appropriate time. I hope that some of you heard the concerns that more people have not been consulted, and that the process is moving very quickly.

AB: This is an interesting issue. How to get knowledgeable advice? It is difficult to react in the abstract. It's a balance we are struggling with--when is it good to consult people?

JK: We have been very busy dealing with issues that have come forward. I would have to say that communication is an ongoing issue. I took time to consult PSC minutes. How can we improve? Where there are weak links anywhere... perhaps we have relied too much on traditional communication.

Rhonda Lawrence (Law): If you want everyone to know something, you might consider not using [top-down communication through] Unit+

AB: Do LAUC members review the [AdCon] minutes? If not, you should.

Maureen Russell: The most recent minutes are from August 8<sup>th</sup>. [A lot happened since then.] But to respond, yes, LAUC has had discussions based on the minutes

Judy Herschman (Arts): With respect to this issue... There have been changes to policy as you went along. These changes were not communicated. For example, policies on maintenance of web pages were not communicated.

[unidentified]: And the minutes are often not specific.

Meeting ended: 1:42 p.m.