

UK LOCKSS Alliance

Members' Meeting

National Railway Museum, York. 10th May 2011

Summary Report

A UK LOCKSS Alliance Members' Meeting was held on the 10th May 2011, at the National Railway Museum in York. The event provided members with an update of recent activities, a forum to share information between member institutions, and an opportunity to discuss activity for the period from now until 2013.

The full agenda and presentations are available online at: <http://www.lockssalliance.ac.uk/meetings-and-events/>. This summary report is intended to collect together key points and queries that were discussed during the event.

Neil Mayo and Adam Rusbridge from EDINA delivered updates on the recent activities of the UK LOCKSS Alliance.

- The staff resources available at EDINA for UK LOCKSS Alliance activities have increased over the last year, with additional resources used to undertake software development. This additional resource also increases the depth of our support coverage.
- Recent technical support has focused on members' transition from the OpenBSD to the Linux platform. Members queried whether they were now recommended to source new machines, rather than old machines. Adam noted that a large disk capacity was recommended, that new machines weren't likely to have problems with Linux (whereas new machines experienced occasional problems under OpenBSD), and that ongoing IT support tended to be better when the machine slotted alongside existing IT infrastructure.
- Members queried whether EDINA could provide a 'centrally hosted' hardware option to simplify institutional hardware requirements.

LSE Institutional Perspectives Session

Bill Barker and Lisa Cardy from the London School of Economics (LSE) talked about the e-First policy that has been put in place at LSE, which defines the institutional commitment to e-Journals, where specific criteria are met, and the mechanisms to support availability and long-term provision of the resources. The focus is to ensure continuity of access before fully transferring subscriptions to electronic only (along with ensuring value for money and extending access).



- LOCKSS is supporting/driving LSE's institutional e-First policy. Before the LSE's commitment to e-journal preservation systems (namely UK LOCKSS Alliance and Portico), print journals took priority over their electronic counterparts despite widespread use of e-journals by LSE staff and students.
- The policy states that LSE requires 'confidence' that long-term preservation is possible before the university will cancel print subscriptions. This suggests the importance of being able to have confidence in LOCKSS, and transparency of the box's status.
- The e-Journal policy allows allocating e-journal support tasks to Serials library assistants, and clarifies the IT support role.
- A useful statistic in the UI would be a percentage measure of what is preserved out of the titles configured for the Library's collection.
- To date, LOCKSS has provided 90% coverage of tracked Springer titles, whereas with Portico LSE have only gained 50% coverage.
- The e-First policy would benefit from access to e-Journal Archiving usage statistics. These kind of quantitative statistics would aid in the justification and reporting of the policy. Hopefully this is what PEPRS can provide.
- Institutional and management buy-in of LOCKSS would be furthered by for example the explicit provision or setup of firewalls and security measures. Security should be visible or fit in with institutional approaches.

Bill described issues encountered by LSE (and most members seconded these):

- LOCKSS must be straightforward enough for daily usage by librarians. For example, daily tasks such as adding new journal titles were not simple enough.
- Another example: Project Muse titles are spread across various publishers and awkward to add.
- Availability of content is not clear. For example, it is not clear from the information on the LOCKSS website that Taylor and Francis have committed content but that it is not yet available for preservation.
- It can be difficult to interpret the UI's Daemon Status page; to make it less opaque, users need to know how to identify issues and how to follow them up.
- Disk space is a concern. The machine at LSE failed and the approach taken to rebuild was to re-configure the box to collect everything, and then remove unneeded content. However, LSE then discovered that this does not delete content and free up space but only deactivates the configuration. Many users are unsure what the implications of "Remove titles" are and find it operates in an unexpected way.



- Disk space is also a concern in the sense that institutions have discovered, after the event, that their boxes have filled up and are not operating correctly. A UI indication and email warnings are required to maintain user confidence in the health of the machine.
- When purchasing a new server, the warranty was for 3 years. To decide the usefulness of this, LSE wanted to have some idea what quantity (size) of content releases was anticipated over that period.

Break out sessions

Participants were split into two breakout groups following an overview of related UK activities. The intention was to discuss the UK LOCKSS Alliance strategic plan and to assess how well this fits alongside current national activities. However, members were also encouraged to highlight their own institutional needs in reaction to the LSE's perspective.

Role of the UK LOCKSS Alliance

- We discussed methods to promote the UK LOCKSS Alliance more effectively. JISC Collections were highlighted as a valuable dissemination channel. It will be easier to demonstrate the value of participation once link resolver integration is in place and content can be accessed.
- There was some discussion about the coverage of collections, and the crossover with other initiatives like Portico. To help identify content, could the Joint Usage Statistics Portal be used?
- Considering the goals and priorities identified in the UK LOCKSS Alliance strategic plan, has a comparison of these been made with the priorities of the US-based development team?

Private LOCKSS Networks (PLNs):

- Members are interested in license-free sharing of their resources.
- There is significant interest but it needs a lead and support provision from EDINA.

Availability of Content and publisher negotiation:

- Why are some titles missing volumes? This is confusing and renders the transfer to e-only content untenable. It makes it difficult to persuade managers of the value of an incomplete run of journals, and by extension fails to support the furtherance of an institution's e-Journal policy.
- Members want to collect 'orphaned' data that is no longer available direct from the publisher, via post-expiry content sharing. However, this is not provided for by publisher agreements.
- Smaller titles present less of an issue in terms of having orphaned content as they can be collected quicker. The collection window for expiring



content is often very small. In conjunction with the previous point, this worries people.

- A major question was how to list and query the preserved content to support libraries management. The new holdings export functionality provides a partial solution to this, and is being developed further to meet these requirements.

Experiences:

- Some members were eager to voice difficulties they had experienced with getting started with LOCKSS, understanding what it did and what their role was (how they would interact with it), and using the UI.
- A proper up-to-date manual provided with the box or in an obvious place is a *major* requirement for people. Several members were clearly feeling bewildered and turned off by what they perceive as a lack of post-signup support. Early post-signup training (possibly in the format of a webinar) was suggested.
- There was significant frustration at the opacity of the UI to the naïve user and at the lack of a manual.
- Lisa pointed out that at LSE they had conducted 'LOCKSS awareness' sessions within the library.
- The title listing on www.lockss.org needs to be more transparent. It is not clear to members which releases are incomplete, obsolete, or not yet available for collection at all.
- Members found the previous wiki very hard to use, even to sign up to. The email list is a simple alternative but there has been little activity, which makes people either forget the option or to consider it obsolete and hence not a good way of contacting members and sparking discussion. It was suggested however that an active mailing list would be the preferred way for members to interact and share experiences.

Private LOCKSS Networks

The sense here was that members are very interested in PLNs. A survey will be conducted to assess member's precise requirements, and what they expect to use it for and get out of it.

- Anecdotally, it appears that people (York, Warwick, OU, LSE) are interested in PLNs primarily as a 'backup' option, providing a form of geographically distributed redundancy.
- Licensing issues around off-site preservation did not seem to be a problem. The indication was that a PLN would be a separate implementation and resource used only for the preservation of content, not serving.



- There was interest in EDINA/MIMAS hosting and managing a PLN's hardware.
- Commitment to a PLN would be contingent upon good setup documentation being provided.
- An open question is how multilateral the sharing will be; there is the potential for quite asymmetric sharing in terms of the quantity of materials shared, and its quality – is it particularly sensitive or valuable to research; is its integrity within the PLN absolutely essential to an institution. It is not clear how to draft an appropriate agreement between participating institutions.
- There was general approval in the suggested approach of first assessing content and demand via a member survey, then setting up a task force of members to review and implement next steps.

Further points

- Demonstrating that LOCKSS works in a live environment is a key priority for all members, and a powerful marketing tool to recruit others.
- Members would like to run ServeContent on port 80, to avoid any port issues with firewalls.
- There was concern that SFX 360 Core/Link doesn't offer article-level searching. *[The provision of OpenURL resolution in LOCKSS, and article-level metadata which can be added to the SFX knowledge base, should remove this problem.]*
- Libraries want the option of specifying an order of preference for when a link resolver directs users to content preserved in LOCKSS, with LOCKSS always being the 'last-resort' option. In part this will help limit concurrent activity on the LOCKSS box.
- Apache Bench was suggested as a good tool for testing server load.
- The WebBridge software (provided and enabled as the default in Innovative Millenium) is another key link resolver system, as it is in use at Warwick, Glasgow, Durham and St Andrews.
- Members would like to see the following announced on the email list:
 - SFX release which incorporates LOCKSS target parser
 - LOCKSS releases
 - LOCKSS reports
 - Surveys and their results