

HOTS Conference Call Minutes
February 14, 2006

Jim Dooley (UCM, Chair), Pat French (UCD), Tony Harvell (UCSD), Lai-Ying Hsiung (UCSC), Carole Kiehl (UCI), Lee Leighton (UCB), Sara Shatford Layne (UCLA), Patti Martin (CDL, recorder), John Riemer (SCP AC), Sharon Scott (UCR), John Tanno (SOPAG rep), Amy K. Weiss (UCSB), Linda Barnhart (UCSD)

1. Please send suggestions, corrections to Hsiung on last week's minutes.

2. Discussion of personal HOTS responses:

#3 – Unanimous approval of a single UC OPAC concept based on our personal opinions. Our differences were centered on whether development should be outsourced, done in-house, or done in collaboration with a vendor. We split evenly among ourselves. Note that we've had experience with Melvyl in house (original Melvyl), and with a vendor (Melvyl replacement). Clarification: #3 is about the OPAC, the public interface to the catalog, not ILS.

Melvyl Deficiencies– among others, Melvyl does not do an adequate job supporting these functions:

- authority control
- detailed serials holdings
- circulation
- clunky interface

Many details and open questions remain....Kiehl pointed out that it's hard to agree if we have to give up functionality. Giving up the local OPAC might be hard to do if the replacement isn't adequate.

French (UCD perspective) – used Melvyl as the OPAC with no Davis view. The rest of ILS function is outside of the OPAC. Desire for integrated ILS was strong – patron services, lack of control over displays....

Harvell is not in favor of "build your own" – programmers move on. Sustainability is an issue, cost (for constant development and upgrade). Leighton mentioned UCB is in crisis – programmers ready to retire. UCB – nothing has changed in 16 years because of financial constraints.

Kiehl is also not in favor of "build your own"...

French – hard to pass data out of an ILS because of lack of standards in data.

Is any vendor robust enough to handle our system?

French – what is a data store? Are we all in agreement?

OCLC vs. Google vs. RedLightGreen – are there principles we can come up with? Pros and cons of working with any of them... OCLC implementation of MARC holdings – that'll be available this week.

Dooley suggested that we focus on different aspects of the task over the next few weeks. We need time to research this more, so will come back to this and make a decision.

French suggested we stick to articulating principles that we find important for each question. What would be the basis for a decision? What are the elements to look for? Which aspects are most important – that will help us articulate the "why".

Another option would be to partner with a vendor, instead of doing it ourselves, or buying a commercial product.

Endeca came up many times as a good example.

French suggested compiling a list of important/relevant factors for #3 – homework for all of us – circulate through email.

Riemer to circulate other organizations choices regarding this in response to Hsiung's request.

ILS Discussion

Single ILS affects Tech Services more than a single OPAC does because it's the data behind the OPAC.

IVb discussion

Harvell – wants the single ILS, but from an operational standpoint this might not be do-able, because a central acquisitions system would need to interface with multiple campus accounting systems. From a work standpoint, this is a big challenge... Audit requirements needs to be factored in, and carefully worked out.

Layne - Single ILS objections – some benefit to redundancy and variety... Reluctant to go to one system. If the system goes down, we all go down. If vendor goes under, we all go under. If someone deletes records, they're gone for all of us. Too dangerous. Not enough redundancy. Principle: we should take every step to protect our data.

Harvell – positive aspects of ILS. Selection is improved. Determining the level of duplication in our collections is difficult with our current practices. Layne pointed out that a single file could accomplish this as well.

Other benefits of a single ILS: Shared expertise, pooled resources, a better interface with campus course management systems, facilitate ILL. Patron information would be stored centrally...

John Tanno left at 12:35.

Next we discussed this topic:

- Create a shared central file with a single copy of each bibliographic record.

Open questions:

Where does this reside and who creates it?

How is it populated?

Does it reside within an ILS?

How does this interplay with acquisitions?

Comment: We could send brief bibs now (to show order status/data). There was a system wide decision not to do that (possibly because of the merge algorithm). Question: if there were a central file, does this issue go away?

Some discussion of what a shared central file might mean:

Purchase catalog client and catalog in this database.

OR,

Share a file as a resource file....

Bib records would go to local system, but no changes would be made there. Could do work in OCLC, import it into central file, add holdings in both places. Then just send a holdings record if the record needed to be updated. Cataloging/editing could happen at OCLC. We wouldn't have to reproduce the functionality.

Are there people downloading ebrary records? Hsiung and Dooley do this and don't send to oclc.

Kiehl pointed out that Karen Coyle had mentioned that we have purchased a cataloging utility with Melvyl, which might be less expensive to work with, rather than purchasing something from scratch.

Note: In this conversation, we've worked our way back to a single ILS... we're doing multiple, duplicative work with a single file of record, so what's the advantage? Layne mentioned that some steps could be automated, reducing duplicative, redundant work, but Barnhart noted there are synchronization issues if data is in two places.

Barnhart reminded us that we must all take a step back in order to make a big step forward. We must come to terms with the idea that we will all lose something in the short term in order to gain in the long term. We are in danger of losing our audience and trade if we're not willing to make some changes.

Dooley's Summary:

Look at some cost/benefit scenario for #3 on the OPAC, and continue this part of the discussion next week. Flesh this out more clearly for SOPAG et al.

Next conference call is 2.21.06 from 11-1 pm.