

HOTS Conference Call Minutes

Feb. 21, 2006

Present: Jim Dooley (UCM, Chair), Carole Kiehl (UCI), John Tanno (SOPAG Liaison), Sara Shatford Layne (UCLA), Lai-Ying Hsiung (UCSC), Sharon Scott (UCR), Lee Leighton (UCB), Amy Weiss (UCSB), Linda Barnhart (UCSD), Pat French (UCD, recorder)

Began discussion with SOPAG question 3 (Section II.1, single public catalog interface):

Questions:

How much would have to be given up to achieve a single UC OPAC?

How much is it worth?

How would it benefit the patron?

Do we have time for the long lead time that redesigning the OPAC would take (without losing our users)?

Do we know what users want? Are we hearing complaints? Are we just guessing?

Comments:

- Pub. Services librarians at UCR are not enthusiastic about a single OPAC
- Some drawbacks include inability to customize (add extra access points, added titles)
- Every library has special notes that it needs (ex: donor info, local genre headings, etc.)
- A single bib record can accommodate local additions if basic principle is that additions are allowed, deletions are not; several large consortia operate this way (ex: SUNY, CIC)
- AACR and MARC provide for multiple local additions but successful results depend on effective indexing for retrieval
- Basic principle of OPAC design should be to enhance access rather than restrict it
- Systems are more flexible and powerful than ever, more is possible
- Downside of adding variant data and indexing widely can be loss of precision
- Some indexing configurations are mutually exclusive (ex: UCLA Film/TV Archive catalog and main library want different indexes; some of them overlap and cannot exist together in same database)
- Sometimes it comes down to compromise where not every need can be satisfied
- One view is that moving to a shared system or shared OPAC is only worth it if it will be much better; there is doubt that current marketplace has much to offer that is better than what we have
- The lead time for such a project would be very long
- Could be useful to distinguish between technical services and public services needs; could divorce the OPAC from the backroom operations; Endeca model separates the two
- Older librarians seem more satisfied with present systems; younger librarians are less satisfied
- There is a general sense that people have trouble finding what they need; it is hard to find known items in Melvyl

ACTION: Amy will draft a preliminary response to this question for HOTS review and discussion.

Re: SOPAG question 4b (architecture options for re-architecting cataloging):

Questions:

- Does sharing a central file of bib records necessitate having one ILS?
- Would it be necessary to have a cataloging client associated with a central file to facilitate adding and maintaining records?
- What would the nature of the central file be? A resource file to support technical services? A public access file?
- What would be gained by sharing a central bib file if the rest of ILS functions were not part of it?

Comments:

- A single file with different local views is desirable
- Would prefer to see local view first; this is already possible with limit by location
- It's important to think beyond the current marketplace constraints
- Currency of the catalog is very important; instant access is now the norm
- HOTS should focus on what it knows is possible, and not try to guess what HOPS might say
- One concept of a central file is that it would serve as an internal cataloging utility like OCLC
- It might be just a bib database with holdings
- It could be useful for ordering and other functions even if not an ILS
- If it were simply a centralized resource file, local databases would be needed
- If not part of a single ILS, creating and maintaining the central file could become an extra step that is not really needed
- It might still require lots of transferring records back and forth
- It would be possible to use OCLC as the UC database, and create a virtual UC catalog like the new CalCat
- Need to remember that records come from many other sources, including vendors, Marcive, etc.
- Need to remember that there are many batch processing workflows in cataloging today where records may not be added to OCLC
- It would be useful to look again at diagrams of record flows submitted to task force by campuses at beginning of process; this could provide a framework to support analyzing different architectural options.

Actions: Lai-Ying will outline some scenarios for possible record flows to help focus HOTS analysis for options.