

HOTS Conference Call
March 21, 2007

Present: Jim Dooley (M, chair), John Riemer (LA, SCP AC), Brad Eden (SB), Patti Martin (CDL), Sharon Scott (R), Karleen Darr (D), Linda Barnhart (SD), Lee Leighton (B), Tony Harvell (LAUC), Lai-Ying Hsiung (SC), Carole Kiehl (I), Julia Kochi (SF, recorder)

Guests: Luc Declerck, Terry Ryan

1. OCLC Implementation Team (Luc Declerck and Terry Ryan)

Results of preliminary discussion showed enough promise that it was decided to put together a formal project. OCLC also has an Implementation and Executive team. The UC teams will meet with them regularly. OCLC has embraced the concept of rapid development, which means fast turnaround. The earliest a pilot would happen is summer 2007. Most likely the pilot will include user review and input. The UC teams will need to tap people early and often and will especially need input from HOTS/CAMCIG in relation to data.

Terry said the Implementation Team will have a charge for HOTS ready for discussion at the April meeting.

Some larger issues to address: What would it take to get data not in OCLC into OCLC? How much data will we try to get in there for the pilot? OCLC is counting on APIs with existing ILSs for holdings information. How will it handle links to UC services (e.g., Request and UCe-Links)?

There was a discussion about what the pilot is supposed to reveal.

- Imp Team needs to get clarification on what the pilot will do.
- The pilot is for something that serves the function of Melvyl (not to replace local catalogs).
- Need to define criteria we're testing. What defines success?
- Need to test interoperability of OCLC and UC services and ILSs.

The UC teams are tracking the University of Washington pilot to see what they can learn. OCLC is interested in leveraging the pilot for discussions with other OCLC partners. The UW pilot has links to the local ILS and to Request functions (on an ILL system). However, the way they handle Request is different than the way we handle it.

Suggestion: Can HOTS or CAMCIG come up with sample records that might test various aspects?

Details of the pilot should not be shared. Public information: we're working on a pilot with OCLC and have set up teams to further explore the issues.

Would it be useful for every campus to inventory reclamation needs and then pass on to Implementation Team? Reclamation may be included for free as part

of the pilot. Reclamation projects are likely, but it is uncertain if they will have to be done for the pilot.

Issues that should be in the charge but need to be addressed in the **pilot**:

- SFX and interoperability with OCLC. Linking strategy breaks down because SFX OpenURLs and PIDs are considered local links and aren't included in Worldcat master record.
- What about special local fields, such as local added entries? Would they have to be placed in holding (or institutional) records or OCLC-created fields in bib records?
- Can you scope search results to branch libraries or sublocations within libraries?
- Why bring non-UC holdings into UC view? Would the OCLC union catalog be just the 10 campuses or include all the other non-UCs? Don't need to include them in the union view because they're already represented in OCLC.

Issues that should be in the charge but can be addressed **later**:

- Is it a better idea for everyone to catalog directly in OCLC rather than in local catalogs? Where do we edit bib records? Worldcat? Local catalogs? If in Worldcat, then would need PCC status for everyone. We should create some hypothetical workflows for the new environment to surface issues and efficiencies.
- Authority records and the relationship we have with authority vendors now. What will happen in the common environment?
- How will the Shared Cataloging Program function in this environment?
- Holding symbols of RLFs. Separate OCLC symbols? What happens with processing or intake work? What about UC Shared Print?
- Series authority. How can we tell if it's something we want to class together or separately?
- Each campus needs to develop an internal broad plan for synchronizing records with OCLC. Need to do workload assessment of how much will it take for us to move down this path. Serials are a particular concern.
- One vs. ten holding symbols. Can OCLC parse into 10 or less than 10? How deal with Tier 2s? If search "at UCXX" would we also get records with UC-wide holdings?
- Discoverability of "on order" records. How to treat order records encountered in OCLC?
- Withdrawals: In which cases do we delete holdings?

Pilot is a minimal set of functionality and data. It will not be possible to address everything for the pilot.

ACTION: Patti and John will ask if list of requirements can be shared with HOTS.

2. Minutes from last meeting

No objections to latest version sent by Martha.

ACTION: Jim will have them posted to the website.

3. April meeting

Meeting is scheduled for Monday, April 9th from 9:30am - 3:30pm.

1st half will be devoted to OCLC discussion. 2nd half will be visits from CDL staff (Ivy Anderson, Heather Christenson, Trisha Cruse).

ACTION: Send any additional agenda items to Jim as soon as possible. (All)

Jim will send HOTS draft agenda next week.