

**HOTS Conference Call Minutes**  
**9/12/2011 -- 2:00-4:00 pm**

Present: John Riemer (LA, chair), Jim Dooley (Merced), Anneliese Taylor (SF), Karleen Darr (Davis), Lisa de Rowlison Ortiz (Berkeley), Vicki Grahame (Irvine, Chair, minutes), Lai-Ying Hsiung (Santa Cruz), Martha Hruska (SD), Patti Martin (CDL), Manual Urrizola (Riverside), Catherine Nelson (SB), Valerie Bross (LAUC)

1. Announcements

Karleen reported that she spoke with the Law Library concerning their decision to use SkyRiver. They hope to realize a 35-40% cost savings compared to using OCLC

Manuel reported that Riverside will begin adding records for the holdings of the Museum of Photography, which is becoming part of the UCR library system.

2. General NGTS update (Martha)

Martha reported that the POTs have all submitted the timelines. The NGTSMT is now reviewing these. Once these are approved, the POTs will begin charging Lightning Teams. There will be a number of surveys from the various POTs. The MT will work to make sure that these are sequenced so that ACGs and campuses do not get hit all at the same time.

3. NGTS POT6 team: Introduction, background, possible activities (Vicki)

Vicki gave some background of the work being done by members of POT6 (Vicki, John Riemer and Tony Harvell and Project Manager, Michael Yonezawa)

First tasks will involve gathering a lot of data from campuses. POT6 hopes to send these surveys/requests through HOTS and for HOTS reps to collect the information on their campus.

We reviewed the POT charge. Vicki explained the decision-making process for the POTs. It was suggested that PAG be listed as a resource in the charge.

4. Three data elements HathiTrust wishes to obtain for UC journal-title holdings (Patti)

Patti explained that HathiTrust needs to obtain OCLC numbers, local system IDs and ISSN for our print journal holdings. She is proposing that she get this information from the data each

campus is sending for the WEST database. We asked for some background information so that we could consult in our Libraries before granting permission.

**Action:** Patti will send more information and each of us will consult with the appropriate person(s) and send a response back to Patti

#### 5. Shared Print and how it could affect tech services work in future (John)

An emerging issue is whether and how to represent the WEST archive commitments in WorldCat Local (WCL). The discovery and delivery of UC-held materials is already provided for in WCL through use of the regular OCLC symbols for the campuses and RLFs. Users are unlikely to need to know particular material is part of an archival commitment, which seems to be of interest to library staff exclusively.

Until recently it was our understanding that the expected workflow for WEST participants involved adding archival commitment data in local files in 583 fields, then extracting holdings data for OCLC Local Holdings Record (LHR) batchloading to the WorldCat database. OCLC's ideal solution for displaying all the archival commitments from WEST and other similar efforts would be to data mine from all the 583 fields and create a single "communal LHR" for a staff audience. Short of being able to do that due to limited programming resources, OCLC has agreed to provide a Group Access Catalog capability to its Shared Print Pilot participants, to be based on separate OCLC symbols associated with the LHRs containing the 583-field archive commitments.

Last month, OCLC's "Print Archive Pilot Local Holdings Record Instructions" (pp. 5-6 of the attached) were changed to require campuses making archival commitments to split their holdings between the special Shared Print symbols/LHRs and those OCLC symbols/LHRs used for all the rest of UC's holdings.

It is a significant amount of work for processing staff to revisit campus print serial holdings, to split them across multiple records, and to assess when to remove regular campus OCLC symbols. HOTS believes this split-holdings technique may confuse users, as HOTS thinks that it benefits the end-user to minimize fragmentation of the information about a particular title held in the same physical location.

HOTS wants the split LHR guideline and the question of including archival commitments in WCL reconsidered by having the full implications explored by all the stakeholders before the policy is adopted.

**Action:** John will draft a memo for HOTS to review, to be sent to SOPAG, with a copy to the WEST Exec Committee, expressing the above concerns.

#### 6. General update about Melvyl (John)

A series of three Melvyl webinars begins this week: Sept 15, Sept 27 and Oct 11, at 10:00 each day.

Serial LHRs were turned on in WCL today.

Next meeting: October 10