

HOTS Conference Call

MINUTES

March 12, 2012

2:00-4:00

Present: Karleen Darr (UCD), Vicki Grahame (UCI), John Riemer, Chair (UCLA), Jim Dooley (UCM), Manuel Urrizola (UCR), Linda Barnhart (UCSD), Anneliese Taylor (UCSF), Catherine Nelson (UCSB), Lai-Ying Hsiung (UCSC), Patti Martin (CDL), Valerie Bross (LAUC), Lisa Rowilson de Ortiz (UCB) Recorder

1. Announcements

UCLA UL Gary Strong will retire in December.

UCSD (via L. Barnhart) shared their RDA implementation timeline

2. Provision of data to HathiTrust from the campuses

a. Continued discussion of policy issues (John's 3/8 email)

If necessary, is everyone able to determine what each library held before being withdrawn? No. Many do not keep long term records of withdrawn material. What is the cost/benefit of keeping track of w/d items vs the possible increase in HT costs that would result from reporting additional print material? It could be significant perhaps - e.g. UCI will withdraw over 300k volumes and UCSB over 100k over the next year.

Can OCLC provide these data extracts, in the future, on behalf of UC instead of each campus taking the time and resources to do it individually?

Action item: Patti will ask HT regarding different cost scenarios; will inquire whether access to in-copyright materials depends upon a library (or the entire system?) having owned it in the past; and how shared print should be reported.

b. 1-page summary on the HT data requirements

This was very helpful document put together by J. Riemer. There are still one or two outstanding questions that we hope will be answered soon.

c. Draft recommendation to MAG--action item in Feb. minutes

Comments on the letter? Does OCLC have the capacity to serve this data to the various projects? Not presently - they do not have a complete picture of holdings. Since the request for each campus to do this type of data export is not going away, we need a system-wide solution to providing it. OCLC was never asked to provide this service; plus we'd be charged for each export and it's unknown whether the exports would be timely or accurate. This situation exemplifies the need for a back-end consortial database. This would be one situation where it would be very advantageous. What's the cost comparison of having each of our campuses continue to provide these extractions vs. having OCLC do this vs. setting up our own back-end ILS? The backend ILS would provide other benefits to UC projects.

Decision: Memo will be put on hold until further notice.

3. The Old UC Minimal Level Record Standard, linked from HOTS web site at:

http://libraries.universityofcalifornia.edu/hots/minimal_marc_std.doc Is it obsolete? (John)

If it is not yet obsolete, it will be when POT2.2 finishes its work on UC cataloging standards.

Action item: John will ask the HOTS web manager to create an "archive" section on the HOTS website and move the document there.

4. Melvyl update (Patti)

The WCL product team at OCLC will look into HathiTrust display issues UC and others have reported.

The OCLC FirstSearch interface will be changed to better support expert searchers. After they do this, a similar revision will be made to the WCL interface for advanced searching. There will be two UC campuses to evaluate the FirstSearch beta interface.

5. Update on resource sharing activities of OCLC Print Archiving pilot (report attached to Patti's email 3/8)

As part of the print archives disclosure pilot, some institutions have been asked to evaluate whether the approach to sending LHRs (additive vs. substitutive) has an impact on interlibrary borrowing/lending. CDL did a test and discovered two unintended consequences of the additive approach that will have a negative impact on ILL (some borrowing requests will appear twice in the queue, and in other cases holdings locations lack specificity).

6. NGTS update (Vicki)

The March update will be out by the end of the week. There is a lot of activity with the Lightning Teams - many are analyzing survey data, writing reports, etc. The Management Team is preparing a high-level schedule/calendar to inform CoUL as to the next steps in the NGTS process.

7. SPiP monographic initiatives

We reviewed the report of the SPiP TF last year. There is a problem with the choice between using the 793s (which would not display in any WCL view except a campus' own, for its own 793s). However, using 583s revives the issue of LHRs for monographs which remains problematic and unresolved. Regardless how this data is exported to WCL, it still needs to be kept in our local systems, in part to respond to the extraordinary number of reports required by SPiP. Will we maintain this data uniformly or can we use whichever approach each of us prefers? It would be useful to have an email/memo regarding an implementation date and the fields to be used.

Action item: John will forward the message he sent to HOTS today to CAMCIG and ACIG, asking them how campuses intend to keep track of the material falling under the new SMCG initiative statements for print monographic series, when it is processed. Deadline: by our May conference call.

Next month's meeting: April 9 (minutes: Karleen Darr)

Probable agenda topic: Discuss draft cataloging guidelines from POT 2.