

HOTS Minutes  
September 24, 2008  
CDL

Present: Lee Leighton (chair, UCB), Jim Dooley (UCM, SCP AC chair), Brad Eden (UCSB), Mary Page (UCD), Manuel Urrizola (UCR), Lai-Ying Hsiung (UCSC), Tony Harvell (LAUC), John Riemer (recorder, UCLA), Anneliese Taylor (UCSF), Vicki Grahame (UCI), Martha Hruska (UCSD), Linda Barnhart (HOTS SCP subgroup chair), Ivy Anderson (guest), Patti Martin (CDL)

## 1. Announcements

UCB: Acquiring III as new ILS, implementing it fall-spring, bringing it up by April or May 2009. NRLF will use UCB's files for inventory control. Expecting to get III's ERMS.

UCD: Completed a reorganization, with two resulting departments: Collection Support Services and Cataloging & Metadata.

UCR: Reorganizing to combine acquisitions and collections into Collection Management. Have recently interviewed for Head of Collection Management.

UCSF: Converted one FTE into a metadata & cataloging librarian; the new hire starts in October. A new Teaching and Learning Center is being built, which involves a very large shifting project. East Asian and some other materials are being sent to UCB and NRLF.

UCI: Have been reorganizing with departure of AUL for tech services. IT departments are moving to public services. Vicki is acting AUL, in charge of cataloging, acquisitions, and preservation. The Heads of Special Collections, Collection Development are newly vacant. Starting up a law library to support new law school. Getting ready for authority cleanup project with BackStage. Starting to use YBP PrompCat. Bringing up III's ERMS.

UCSD: One-time funds being used for 2 years to try out the WorldCat Selection service. Will include YBP, Casalini, Touzot, Harrassowitz, and possibly also one Chinese vendor. Implementation not begun yet.

UCSC: Began participating in a Strategic Planning process. Will implement III's ERMS soon. Finishing reclamation project, which had 99.64% match rate. Resulted in very little fall out--4,200 records, most of which are serials.

HOTS members compared notes on budget cuts anticipated on the campuses.

## 2. Shared Cataloging Program: scope and new procedures

The draft scope statement significantly broadens SCP. HOTS expressed unanimous support for expanded SCP scope. We at least want to go that far; we also want to “widen things out” in terms of the new SOPAG proposed effort to explore centralized technical services. In the future, “SCP staffing” is likely to be more than the current operation at UCSD.

We decided to shorten the cover memo to the ULs and to bullet some of the scope statement.

Timeline: ACG consultation on new SCP scope statement to be done by Nov 30. Subgroup then works on funding, governance models and staffing, getting the proposal agreed to by spring, for a July 1 implementation.

No additional cuts anticipated to existing SCP budget, beyond the recent \$48K reduction.

**Action:** Linda will reformat and shorten the document for our review on September 25. Lee will transmit to ULs by September 26.

### 3. Collection Management Systems

Mary Page led a discussion of CMSs. UC Davis and other campuses have a need to manage temporary web pages. LibGuides is an inexpensive tool for resource guides; HOPS is looking into broadening its use. CMSs also include portals and gateways to digital library project output, of which Calisphere is an example. UCSB recently acquired CONTENTdm.

Free ones exist such as Drupal, Joomla. They are “free” like free kittens; they still require some support system.

The BSTF Report’s recommendations are as applicable in the digital realm as they are in the technical services realm. Do we really need to have different ones at every campus? This past spring SOPAG sponsored a Digital Library Collaboration Workshop at UCI where coordination of CMSs was discussed. Could there be a common Wiki platform in UC?

**Action:** Mary will survey HOTS to find out what CMSs are in use on our campuses, as well as what unit(s) “own” the activities and tools..

Preservation needs our attention: Web Archiving Service (WAS), Digital Preservation Repository (DPR). Cost models for Digital Preservation Repository are being developed.

### 4. Coordinated Processing Across the UC System

Lee had previously distributed a list that delineated areas of cataloging and language expertise offered and needed for each UC. CJK expertise is fairly widespread, most likely because of strong East Asian academic programs. For non-Roman languages, the need is often for reading ability, even to find out if copy is available.

UCB will be performing original cataloging for about 400-500 German titles for UCSD. We want to avoid complex cost-sharing models. We also want to avoid sending large numbers of titles around the UCs. The ideal would be that each campus would provide and lend expertise, and that everyone would benefit. We don't need to ensure that a precise number of hours per project is reciprocated; the model should be cooperative. The idea of "UC Enhance" was discussed, in which one UC creates a minimal level record, and another UC enhances the record. Another idea was to hire a part-time cataloger for all of UC, who has expertise in a widely-needed area.

It was agreed that we should put the list into a spreadsheet, so that we could visualize groups of needed and offered expertise. Mary will work on the spreadsheet. Lee suggested that we all send an updated list of needed expertise for our individual campuses.

## **5. World Cat Local Pilot Update**

John and Patti led discussion on the Next Gen Melvyl project. Because of the delay on integrating Request into WCL, it now looks like the pilot will continue into 2009. The Exec Team will discuss the implication for the delay with the ULs at their next meeting, and we will be notified if there is a delay on the decision to end the pilot.

Local Holdings Records: Currently, a Z39.50 search for a title queries local holdings for all campuses. Could we create local holdings records containing summary holdings statements that OCLC would display first? Then Z39.50 queries might occur only if initiated by users interested in seeing circ status. This could improve response time.

OCLC symbols: Each RLF holds items from all campus collections in the northern/southern half of the state. Separate OCLC symbols are available for flagging SRLF and NRLF holdings in WorldCat, 'ZAS' and 'ZAP,' respectively. The Symbols Team is going to be asked to help UC determine the plan for setting holding symbols on the records in the RLFs, by laying out the options and making a recommendation. When OCLC programs the capability for a campus' OCLC symbols to point to different ILSs, it would be possible in the Irvine view of WCL for CUI to point to AntPAC and the ZAS symbol to point to UCLA's Voyager for the status information on SRLF deposits. It is possible to route ILL traffic with OCLC symbols by adjusting settings in the WorldCat Registry. Traffic could be directed toward the RLF or toward the individual campuses.

Usability Test: Initial results indicate that users like NGM, especially the fact that it now includes journal articles, as well as UC and non-UC holdings. They also like the "Google-like" search box. A priority area for improvement is clearer displays of the

many links and icons relating to e-resources. OCLC is listening carefully to feedback from users and libraries, and they have been very responsive. Recent changes as a result of user feedback include the elimination of authors in the display of serial records, relevance-ranking regardless of location, and the embedded Google book viewer. We are encouraged to complete the user survey on the NGM site and to encourage our colleagues and users to do so as well.

Some questions: What are our obligations to maintain Old Melvyl (Classic Melvyl)? When will we have enough functionality in NGM? When will the system be good enough to go live? Bibliographic record maintenance should move to the network level. How will that work? Discussion ensued about what has to happen to be able to go live with NGM.

Costs: Currently, CDL is planning on covering the cost of both the pilot and the current version of Melvyl. This of course depends on how long we need to maintain both systems. Should we go forward with NGM, CDL should realize savings from the cost of current Melvyl, however, they are roughly equivalent to WCL costs, so there will be no big gain. No costs are expected for the campuses for NGM, however, there might be associated costs, such as additional labor costs.

OPACs: Should NGM go forward, UCSB is planning to take down its Aleph OPAC and rely on NGM. UCB is hoping not to have to implement the III OPAC once they've migrated.