SCP Conference Call
July 20, 2009
Minutes

PRESENT: Jim Dooley, UC Merced (Chair), Valerie Bross, UCLA (recorder); Becky Culbertson, UCSD; Lai-Ying Hsiung, UCSC; Nina Meechoonuk, UCSF; Lisa Rowlison de Ortiz, UCB; Adolfo Tarango, UCSD; Holly Tomren, UCI

GUESTS: John Riemer, UCLA

1. **Announcements**
   a. **Next call (Aug 17): canceled**

2. **Next Gen Melvyl Update (John Riemer)**
   a. **Missing Records & Reclamation**
   Generally completed. Berkeley to process NRLF Records (ZAP) soon.

   b. **News about LHR content and display from OCLC**
   - Question: How many LHRs should be created for multiple URLs?
     OCLC Preference: OCLC LHRs assume one copy per LHR, but can accept both single URL or multiple URLs.
     Note: Innovative can only submit multiple URLs per LHR. UCLA submitting single URL per LHR.
     Note: If you submit a holdings change for a title in ONE copy, must send all LHRs. But do not send SCP holdings. Main advantage: One LHR per 856 would permit display of summary holdings. Based on all 853/863 fields. August: Earliest implementation date for local campuses to submit LHRs. But actually implementation date will depend on test results.
     - Berkeley: separate LHR per format.
     - UCSD: same. For each format, will have a separate LHR. Need to weigh cost/benefit of multiple LHRs for e-serial providers. Would prefer one LHR for SCP; individual campuses can have a separate LHR.
       Note: If have one LHR for all URLs, then 793 would include all names
     - Lai Ying: export all SCP records to an Excel file. Comparing 856 to 793. 28,000 $z Wiley → 793 Wiley Interscience. If you cross-walk the 856s, then most of the records could be mapped to separate LHRs. Only a few are not unique. Could move the $z term to a separate subfield, e.g. $n, so that the 856 string could be used to create separate LHRs with 793 fields. Use would depend on OCLC development in the future. Question: Does decision for SCP need to be the same as for local campus?
     - UC Irvine (Holly): 856 pulled from the bib record and mapped to a holdings record. Multiple 856s were sent to a single holdings record. SCP 856s were removed. In future, may have separate checkin records for each 856 $u URL. Will need to wait and see results.
     - UC Merced (Jim): Not clear whether what works for one Innovative system will work for all. For example, we do not have check-in records

Action: Lai-Ying Hsiung and Jim Dooley raise this as a discussion item with CAMCIG in the August 3rd telephone call.

- Question: If there is only one URL in an LHR, then how should the holdings information be coded?
  OCLC Preference: Assuming single URL, prefer 853/863 pair; or 866 field

- Question: What is the time frame for implementation of the fields that OCLC will be designating for local data?
  OCLC has no time frame for the local tags to be entered in holdings (e.g., 793)

- Question: How should general or specific should libraries define their holdings symbols?
  Comment: Right now, campuses are testing extraction through Voyager, Aleph, III: to extract & load daily or weekly. While waiting for test, think about the 4-character codes. These can be as granular as desired, e.g., Art library or Art Library Oversize. Expect a call soon to load LHRs

- Question: What are the long-term uses of LHRs that campuses might consider?
  Long term use of LHRS (reported to HOTS): (1) response time; (2) e-resource holdings (so may not need to distribute SCP records); (3) analog materials for small branch libraries; (4) on-order, in-process materials; (5) virtual bookplates; (6) copy-specific data e.g., local names, local notes. (Some of these functions go beyond replacing Melvyl)

- LHRs to handle ALL formats eventually; OCLC starting with serials/s-serials

c. **NGM General Developments**
  - By Aug 19, all campuses should point to Next Gen Melvyl. Do not need to remove all links to Classic Melvyl; but the most prominent link should be to Next Gen Melvyl.
  - Multi-ILS capability, permitting some affiliates and/or RLF holdings in campus view: timetable being set

d. **ALA Highlights, related to NGM/NGTS**
  - ONIX data for monographs (Renee Register): to use to create metadata. ONIX record→ FRBR work cluster, authorized forms of names → returns enriched record to publisher. See full notes below with link to OCLC report by Judy Luther

3. **Next Gen Technical Services update (Jim Dooley)**:
  a. Status: The four task groups are working. The Web site is up. First deadline is October: environmental scan. (E.g., the scan will look at the way that the RLFs work--are the workflows well-coordinated with what the campuses are doing? Probably as separate TF will be convened to look at this question.)
  b. Campus visits: Two steering team members will visit each campus to give an update. Basis probably the slides used at Big Heads. To come this summer
  c. Presentation: Jim Dooley's ALA presentation went very well. Other campuses are also beginning to review these topics. For example, Columbia and Cornell (2CUL) looking at collaborative approval plans, while keeping accounting systems separate. (Despite both being Voyager, the two campuses don't interact well.)

4. **SCP reclamation record distribution (Adolfo Tarango)**
   - Status: Sent out email to let AT know by last Friday. UCSC, UCSF questions answered
     035 -7 $a (Original match point)
   - Friday July 24: Serial file, mono file (except EEBO) to come. The EEBO file
     Note: The campuses doing batch delete/batch add should either protect the EEBO records
     or re-load based on the EEBO file. (e.g. Merced to use delete/batch add technique)
   - Post-reclamation: We believe you can delete the 035 -7s from the records once reclamation
     is over. From that point on, all files will have: 001, 035. The 001 will have the OCLC
     number. The 035 will have the OCLC number with the appropriate prefix.
     We hope that all packages will be in OCLC. But if we ever do send you a file of vendor
     records, the vendor number will be in the 001 and the vendor number with a prefix will be
     in the 035, e.g.,
     035 -- $a (XYZ)1234.
     In the 001, will have a prefix or suffix, e.g., ln for Lion; it will always be an alphanumeric
     code for vendor records. In the 035 will use the appropriate MARC code (if there is one)
     Exception: EEBO records will not have an 001. They will just have an
     035 -- $a 132456eo

5. **General SCP update (Adolfo Tarango, Becky Culbertson)**
   - July 22: ASPI journals (Tier 2) canceled, CRC Press cleaned up; Readex Gale newspapers
     removed.
   - Starting July 27: Will see SCP in OCLC, but won't have records in local system yet.
   - To continue to catalog as usual. Four to six weeks from now, when everyone is ready, will
     send a large catch-up file. Process as standard file (new, update, delete).
   - **Please Distribute Becky's 599 Message to all Processing Units**
   - Monthly Update: Coming soon.

6. **Next Conference Call: September 21st**

OCLC WorldCat Local update, for SCP-AC (John Riemer)
July 20, 2009

Missing Records & Reclamation

Campuses generally have completed bib record reclamation. UCB will process NRLF's holdings with ZAP symbol following the implementation of Millennium.

News about LHR content and display from OCLC

I recently obtained answers to several outstanding questions:

1. In the case where there are multiple URLs for a title, does OCLC have a preference between
a) one URL per LHR
b) multiple URLs in a single LHR?

OCLC response: OCLC Local Holdings Records assume one copy per LHR but we can accept one or more URLs in a single LHR and are planning the display within WorldCat Local to handle either scenario.

2.   If 1a) remains a valid choice, what should be done with e-coverage information
a) leave it in subfield $3 in the 856 field of the LHR
b) move it to 866 $a, which is the same place one would expect to find print version summary holdings?

OCLC response: Ideally, coverage information should always be in the 853/863 paired fields but if that's not possible it should be in the 866 field. Those are the fields that are used during batch processing to create a summary field. The summary field is the one that displays for holdings information in FirstSearch and is planned for use in WorldCat Local.

3. In the "Local Data elements – OCLC Recommended Actions" overview document OCLC sent out in mid-June, we saw listed the fields from the bibliographic format that OCLC intends to define for use in its version of the holdings format [500/700/710/711/730]. How soon will the fields be validated for use in WorldCat, such that UC campuses can start to include them in LHR submissions? Right now the fields (or the entire LHR containing them) would get rejected upon batchload.   [Determining this precedes the question of how OCLC will index & display those fields.]

OCLC response: We are still working out the technical details on the Local Data elements project and is also being prioritized and will be scheduled accordingly. We will let UC know once everything has been finalized and we have appropriate details and dates.

Testing of LHR batchloading is now taking place: UCLA now can do it weekly from Voyager. UCI recently had its first batch from III processed by OCLC. UCSB has submitted paperwork for a batchload request, from ALEPH.   Hope to find out if is possible to extract the data from each ILS and to test ability to frequently upload. Maximum frequency had been monthly.

Good news: OCLC has now committed to using LHRs for all materials, in phases: serials/e-serials; other e-resources; everything else.

What campuses can do now:

1) Prepare list of your 4-character 852 $b holding library codes.   How granular do you want to be?
2) Expect a call from Imp Team soon to batchload LHRs for serials, so that the response time problem for large serials can be addressed in WCL.

What LHRs will be able to do for us in the future:

   Looking ahead to how important LHRs will be for the front and back end considerations, for those institutions trying to make WCL a part of their future, we should note this range of uses:
   A. Serials for the large serial holdings response time problem
   B. E-resources, so that an institution can clearly specify what the relevant URLs are for local access (we would like Shared Cataloging Program to have option of no longer distributing bib records to all the campuses)
   C. Analog materials, so that small potential-affiliate libraries without ILSs that OCLC supports can provide WCL with everything but circ status (i.e. call#, location, summary holdings, URLs)
   D. On-order & in-process materials, so that libraries setting symbols at the order stage can have some means of indicating that the material is not received yet (the Innovative libraries would then not have to face artificial creation of an item record for not-yet-received materials, which would now be required if we wanted WCL to serve the ILS-like function of showing on-order titles)
   E. Virtual book-plating (i.e. use of a URL in a holdings record to signify the title is part of a special local collection and/or acquired with the help of a special fund; this is another function an ILS can now serve)
   F. Providing access to local data that is copy-specific (i.e. indexing of local name or title or genre access points; displaying of local notes)

NGM General Developments

By Aug 19, campuses asked to point to NGM, to help make the fall evaluation period a success.
Request programming due to ready in Sept/Oct.
Multi-ILS capability timetable for development expected to be set soon.

ALA Highlights, related to NGM/NGTS

ONIX to MARC and back again presentation (Renee Register, OCLC)
Midwinter presentation on this project:
http://www.oclc.org/multimedia/2009/From_ONIX_to_MARC_.htm
When the ALA Chicago update is posted, it likely will appear here:
http://www.oclc.org/us/en/news/events/presentations/default.htm

Report issued by NISO & OCLC: *Streamlining Book Metadata Workflow*, by Judy Luther, June 30, 2009
http://www.oclc.org/US/EN/news/releases/200940.htm