HOTS conference call (11/10/2008)

Monday, November 10, 2008
1:00 PM

Subject	**HOTS conference call**
Date and Location	Monday, November 10, 2008 2:00 PM - 4:00 PM
Attendees	New LAUC rep: Lisa Rowlison de Ortiz at UCB Lee Leighton (chair, UCB), Jim Dooley (UCM), Brad Eden (UCSB), Mary Page (UCD), Manuel Urrizola (UCR), John Riemer (UCLA), Anneliese Taylor (UCSF), Vicki Grahame (UCI), Martha Hruska (recorder: UCSD), Patti Martin (CDL) Absent: Lai-Ying Hsiung (UCSC)
Message	Notes 1. **Announcements** John noted the recent release of the Ithaka/ARL report on **Current Models of Digital Scholarly Communication** http://www.arl.org/bm~doc/current-models-report.pdf. UCB is now in a hiring freeze, they are working on trying to get exceptions Patti noted that the revised OCLC WorldCat Record Use Policy was released last week http://whatcounts.com/dm?id=48E5FD6F403BCBD776D83E3D862385DC27DAAE84C125C534. She suggested we should review and consider its implications for the UC. Patti has sent out link to all. *Note: Linda Barnhart passed on this information:* *From the Cataloging Futures blog: I was going to pull together links to all the blog posts on OCLC's Policy for Use and Transfer of WorldCat Records. Then I discovered that Ryan Eby had already gathered everything you need to know over on the Code4Lib wiki.* **Action item:** Lee will refer to CAMCIG Google Settlement info. Mary noted that Pat Schroeder spoke at Charleston on this. Illustrations won't be included in the digitized out of print/copyright books. The Hathi Trust may allow more options. **Action item**: Patti will send along Ivy's summary of the settlement and impact on CDL. There was some discussion of how budget cuts may curtail travel? Will people be going to ALA with budget cuts? Is LTAG looking at options for Video Conferencing software --? Coordinating wiki software? 2. **Final cataloging expertise spreadsheet**. Comments? Mary sent out latest version Mon. afternoon, which now includes John's comments. The updated version will replace the old document on HOTS web site. Members will review a final time this week, send in any corrections by Fri. **Action items:** Mary will send final version to Lee next week. Lee has volunteered UCB to do web site management for HOTS and CAMCIG.

3. **Next Generation MELVYL update** and work to be done on the campuses

John and Patti gave an update on WCL. The decision will be made if we are moving to production by Dec. 08. Imp Team has made recommendations to Exec Team on three phases of implementation: now beta, next pre-production, move to production in 2009. This proposal will be discussed at the UL's meeting next week.
Below is a listing of some of the TS work that hasn't been done that would need to be done before final production.

- Reclamation for all campuses including holdings
- Request functionality fully integrated.
- Question for the UL's will be: Is there enough content there to go to Pre-Production?
- Missing Records Team… has been working on what data will go into LHR. The goal would be to implement LHR's by next June, hopefully.
- Revised Reclamation document has been posted in the Updates section of the UC/OCLC Pilot web site, http://libraries.universityofcalifornia.edu/about/uc_oclc.html. They are still waiting for feedback from OCLC on possible implementation and 'pre-harvesting' holdings info into LHRs
- Holding symbols Team recommendation re NRLF and SRLF: symbols for RLF plus original owning lib

The Imp Team is now reviewing the status of the working groups and the outstanding issues and questions. Are we going to have In Process and On order records in WCL? It was noted that Lisa Spagnolo at UCD did produce a test file… questions remain about records in WCL for items we may never get. When ACIG discussed this issue a while back, there was a relatively small subset that ACIG would recommend having in WCL. The question for ACIG is how do-able is it to extract and load in process information from the local catalogs? Imp Team to scope the question for ACIG? Should Imp Team also ask for PS input on value of having on order records in WCL? Early thinking in CDC was that it would be good to see what others are ordering, but now there are other tools, like GOBI that support this functionality for collection development.
There was some discussion of how this status information would be reported in WCL. Status would show on order, or in-process, rather than just cataloged. These LHR could be used for status information . Thinking to date has been that since current Melvyl does not show on order records, WCL would not need to either. But Z39.50 queries of the local system to find status, then display local status including the on order and in-process information

Action item: *[Following UC-OCLC Implementation Team discussion Nov. 19] John reports that prior to public services consultation and an eventual policy decision in early 2009, ACIG to be asked "What is the feasibility of including on-order/process records in WorldCat Local? If the policy were for WCL to include them to the maximum extent possible, what categories of records (i.e. firm orders, approvals) and what approximate proportion of the library's receipts could users expect to see?" ACIG input to be received by HOTS by the end of Dec. 2008.*
Lee will refer to ACIG.

John reported on the WC Local User Group recently met… John sent the following message:
New WCL Listserv and Users Group

A new WorldCat Local Users Group has been formed and met for the first time Oct 16. Audio and Powerpoint slides available at:
https://oclc.webex.com/oclc/lsr.php?AT=pb&SP=EC&rID=27933682&rKey=90A72D55EA9B2044

The group is expected to meet quarterly: in person meetings at ALA and "virtually" the other two quarters. Next meeting is Sunday Jan. 25 at 1:30 in Denver.

If you are interested in following the developments of WCL, you can do so by via the new WorldCat Local customers list, OCLC-WCL-L. The page for subscribing is at: http://listserv.oclc.org/archives/oclc-wcl-l.html

Work to be Done for WCL:
Mary reported that UCD completed Reclamation for their 2.1 mil records. They found 58,000 that need to be corrected.
SCP still has to do Reclamation for monos
Everyone would have to do LHRs again once that is decided.
UCM will have bib record part done before too long. III extraction for LHRs. UCSD will pilot for III

Current Melvyl needs to equal content of WCL. Paying to maintain 2 identical Melvyl union catalogs will not be sustainable
Policy decisions on how to work with RLFs still need to be finalized.
Plans for campus maintenance still needs to be figured out.
Bib record reclamation for all campuses needs to be completed in next 6 months. LHRs need final specs.

Is this overwhelming? Still to be determined: Can systems extract summary holdings? These have been stored in local systems in various forms.

4. **Round robin on the Charleston conference**
Mary blogged the conference http://notesfromcharleston2008.blogspot.com/
Jim Dooley: OCLC Guidelines document was a hot topic; the reason for the revision is to primarily head off stealing records…
Discussion of Google settlement… Pat Schroeder… Jim's takeaway… so many implications and still need to have the settlement approved. Mary's point that illustrations won't be included is also a significant one. Each copyright holder gets $60 from Google. One terminal for access in public libraries to in copyright materials. Rights holders have 27 months to opt out. Theoretically possible that court will throw out. Agreement on free-lance journalists rights (Tasini) was agreed on 5 years ago, and still not done.
Will take a while to sort out… maybe another 5 years??

Deanna Marcum on LC report… Several questioners said that 'you can't say you're the national library when it suits you and not the national lib when that suits you'. LC is still plodding thru the recommendations, looking especially at more cooperation from other librarians, including the UC librarians. Push out more work, expanding BIBCO, NACO, etc. Seeing more low level records now, OCLC will put dupe detection back in place. LC should exploit their own special collections, with expectation that others will do that also. What about getting more metadata from publishers? DM did not discuss.

Schottlaender gave the plenary session presentation on UC experience defining Collective Collection, not so much the individual deposits. In UC context, the priority has been to collectively decide behaviors for the collective collections.

Other hot topics: E-books… many other libraries are also working on Springer deals... Open Access discussion between Nature person and Springer since they bought BMC. Nature rep said

	that open access model for top-tier journals is unsustainable; Springer disagreed. Lee noted that the SOPAG Collaborative TS proposal will go to ULs next week.