

HOTS Conference Call
April 12, 2010

Present: Armanda Barone (UCB), Mary Page (UCD), Vicki Grahame (UCI), John Riemer (UCLA, recorder), Jim Dooley (UCM), Manuel Urrizola (UCR), Martha Hruska (UCSD), Anneliese Taylor (UCSF), Brad Eden (UCSB), Lai-Ying Hsiung (UCSC, chair), Patti Martin (CDL), Lisa Rowilson de Ortiz (LAUC)

1. Additional Agenda Items
(none)

2. Announcements

a. UCR: Has hired a part-time Thai cataloger.

b. UCLA: AUL portfolios have recently changed. Print Acquisitions and SRLF now report to same AUL as Preservation, Cataloging & Metadata Center, Digital Collection Services: the AUL for Collection Management & Scholarly Communication (Sharon Farb).

c. Jim will share with us the UCM workflow for shelf-ready.

3. SOPAG Shibboleth Task Force about WAYFless URLs in bibliographic records: see Mar. 11, 2010 email. Still waiting for more information about the WAYFless URL format and relationship between EZPROXY and Shibboleth (All)

We are being asked if we can change every URL in every record.

Lai-Ying has not received answers for some earlier questions she has submitted.

Vicki: To respond, we could count how many records/URLs would need to be changed. UCI has "Hundreds of thousands of URLs. Could automated means help with the changes?"

John: For titles held by multiple campuses, would we need campus-specific URLs established for every title? Would agreement from each resource provider be necessary to do some set up work (a new factor for providing our users access)?

Jim: Shibboleth would also need to do set up at its end, in addition to the vendors.

In order to respond, we need more information, particularly how much automation would be able to help us with what is needed.

Action: Lai-Ying will draft a response for us to review.

4. Final Report of the UC Libraries Collections Space Planning Task Force need response to SOPAG by April 30: see my Mar. 30, 2010 email (ALL). Following are what I find interesting in the report:

a. "Cataloging -- NRLF has highly developed skills in this area.
Consider additional cataloging support and opportunities at both RLFs?"

Create OCLC authorizations at the RLFs not only for campus records but also for Shared Print records? The RLFs currently piggy back off of campus records to create a Shared Print record and then modify holdings.

These records don't follow consistent standards across RLFs and are often not visible in NGM or even campus OPAC (thus limited access and seriously skewing usage data and any future analysis of the success of resource sharing.)"--end of appendix A

b. "Inadequate and inaccurate holdings": mid of main report p.10.

Any other interesting findings that relate to HOTS? Should we submit a group response?

John: How coordinated will our collection development in UC be in the future? Extremely coordinated, such that almost all titles will be acquired in a single copy within the system? More coordinated than it is now, with greater amounts of material coming in under the Shared Print Program?

Martha: Paring down the duplication (multiple copies and also across print and electronic formats) in the RLFs will be needed to free up vital space. Could we rely on trusted repositories outside of UC?

John: For campuses with local storage facilities, is funding stable and what capacity remains? UCSD's local annex is approaching capacity. UCSB's two annexes are full. These will need to be weeded down.

Martha: Google mass digitization/Hathi Trust may open up options for de-accessioning print copies.

Lai-Ying: How much of a challenge would it be in our local workflows to check for duplication of potential RLF deposits, to check for duplication against *both* SRLF & NRLF?

Action: Lai-Ying will send out a draft response, which will be a starter document for all of us to contribute to.

5. Next-generation policy for WorldCat records (WorldCat Rights and Responsibilities for the OCLC Cooperative

<http://visit.oclc.org/t?r=896&c=2045782&l=120817&ctl=2F208F8:EC6FB6B1D38ABD2130727EF42764003FAB211475F9D6EDD4&>): see April 7 email sent out by Jim (ALL).

WorldCat is a shared community resource. Members need to be free to use it in many ways, while at the same time they are helping to protect it.

John: Is there any use we would like to make of WorldCat records that we are uncertain is permitted by this new document?

Martha: We want our digital library collections and their metadata to be discoverable in WorldCat; is there any concern that we would lose control over the metadata?

We decided that any comments we have on the policy should be sent to OCLC from individual HOTS members; we are not planning a group response.

6. April Report of HOTS Non-Roman Backlog Subgroup update: extension request in process (Armanda, All)

Members: Adnan Malik (UCB), Adam Siegel (UCD), Kuei Chiu (UCR), Armanda Barone (UCB: Liaison), Sharon Benamou (UCLA)

Armanda: The group is in the process of finalizing the report. An extension is needed, to April 29, for submission to HOTS. HOTS could discuss the report at its May 10 conference call.

Adnan and the group will make recommendations on the time frame for the backlog clearance, a funding proposal for the selected approaches and identify a small group to negotiate required agreements with vendors..

Action: Armanda will send Lai-Ying the revised timeline that we approved today.

7. Shelf-Ready Update: (Brad, Martha, Jim, All)

Members: Keith Powell (UCI), Brad Eden (UCSB), Shirley Higgins and Cindy Geraldo (UCSD), Susan Boone (UCSF), Jim Dooley (UCM: Liaison)

Brad: Some campuses need to supply the group with some additional metrics. A draft report is circulating among task group members. Expect to see it by end of April for discussion at our May conference call.

8. NGTS Update (Martha, Jim, Amanda, All)

NGTS has been focusing on what phase II of its work will include. Charges are being written for four anticipated groups:

- a. Financial infrastructure and how we can better share staff resources. This requires library admin experience.
- b. Looking at enterprise-level technical services. Not dependent on the particular ILS a campus has. Includes ERM-ILS relationships (data overlap).
- c. New modes of resources: will address types of collections that have not historically been part of traditional tech services, e.g. archives, special collections, and born digital resources.
- d. A group that would look at collection development and coordinate with CDC. NGTS will consider how best to accomplish this following the CDC retreat April 30.

The aim is to finalize the draft charges, and proposed members for the first three groups in about a week.

The HOTS subgroup will continue its work on non-roman materials.

9. Next Gen Melvyl /LHRs (John, All)

We will soon be up to 8 campuses that have completed at least one load of LHRs for serials: UCSF's first load has been received at OCLC; data is expected to be loaded this month. Other campuses completing loads previously: UCLA, UCI, UCSB, UCSD, UCM, UCSC, UCD.

No further news from OCLC on its upcoming group involving UC and other WCL institutions to determine how summary holdings data can be presented down at the location level, not just up at the institution-wide summary level.

The programming to enable campus view of WCL to point to multiple ILSs based on holdings symbols was completed in March. Testing is being prepared by UCLA's Film and Television Archive.

The first report from NGM-NGTS joint TF on LHRs outlining requirements, best practices, and recommendations for campus implementation of LHRs has been posted to the NGM public site:

http://libraries.universityofcalifornia.edu/about/oclc_docs/LHRsSerialsReport1.pdf

and

http://libraries.universityofcalifornia.edu/about/oclc_docs/LHRsSerialsAppA.pdf

Some additional appendices are going to be added soon.

The joint LHRs task force held a 2-hour discussion of the advantages/disadvantages of changing the single-record technique for e-serials to the separate-record technique. Next step is to pull a report out of the raw notes.

10. Next Conference call: Monday, May 10, 2-4 p.m.

Recorder: Martha Hruska (UCSD)