HOTS Conference Call Minutes
9/13/2010, 2:00-4:00 pm

Present: John Riemer (LA), Jim Dooley (Merced), Anneliese Taylor (SF, minutes), Karleen Darr (Davis), Armanda Barone (Berkeley), Vicki Grahame (Irvine, Chair), Lai-Ying Hsiung (Santa Cruz), Brad Eden (SB), Martha Hruska (SD), Patti Martin (CDL), Lena Zentall (CDL, guest), Marjorie Tibbetts (CDL, guest), Jackie Wilson (CDL, guest)

Absent: Manual Urrizola (Riverside)

1. Lena Zentall (guest) -- overview of the options for using SFX data with the 2 ERMS systems within use at UC — iii and Serials Solutions.

Chart – "UC Campus Options for Syncing SFX Data with ERMS Systems". Snapshot; not set in stone yet. Will be posted on UC-eLinks section on CDL site.

Right now only working with III Millennium ERMS and Serials Solutions.
Ongoing data synching – murky; needs further discussion. Tools are evolving. Limitations now because no ways to indicate changes or cancellation of resources. Serials Solutions has a report, but things are still not ready for primetime. Knowledge bases don't keep record of a deleted record; it disappears. Also, there's no "last changed" date.

A lot is happening at NISO level (KBART). CDL did have script to do compares, but not since 5 years and could be significant effort to revive those scripts.
For importing into local ERMS, CDL can provide CDL or campus data (or both) from SFX.
Limitations – with Serials Solutions you lose volume and issue (SS doesn't track that; SFX does).
Extracting file of CDL data from SFX, all or nothing, have to get the whole CDL file – can't limit to only those updated by SFX or CDL.

CDL is not exporting their SS data at this time. Options for campuses exporting depends on where you want to export to.

How did CDL get data into SS? Paid SS to do it. Had to use data from 3 different sources (SFX, SCP records, manually created). Very large undertaking, not very straightforward.

Using SFX for statistics – CDL is using SFX info to generate ARL ejournal stats number. (Not using the ERMS as of now). Martha's question – since SFX generates MARC XML files, could these be used to create SCP records? Marjorie - they are very brief records. Question should be brought to SCP Advisory committee – level of cataloging is brief; not CONSER. In interest of NGTS, worth considering. exLibris Market Service – we'd get records for everything.

SFX Export Report – was developed with CDL. CDL not using it with CDL data at this moment; not useful for any title/access changes. Perpetual rights questions – titles get dropped from SS Knowledge Base as ownership changes.

Files that CDL would create would include all Tier 1 and 2 for that campus. Ebook targets are not numerous yet.
Free resources – has more activated than SCP has cataloged (CDL activates them as added to KB). Records for database like Biosis or Web of Science will not be activated by CDL. Title level records though such as those within EBSCO Business Source Complete, will however be activated.

CDL tries to separate the title out for previous titles. Cannot add a title to the KB. Not on SCP's roadmap to catalog everything activated in SFX.

Optimal schedule – needs to be worked out. Unfamiliar with how quickly or well the Saskatchewan script runs. Monthly or biweekly schedules. Tie it to when the KB update is done (brings in all new titles added to resources like LION or EBSCO as they are available). CDL willing to work with any campus wanting to test it out. SC and Irvine are first testers.

2. Jackie Wilson -- discussion of a questionnaire that she is going to ask us to fill out to help evaluate the Springer ebooks pilot.

Ebook pilot agreement was reached in 2008. Features:

- Over 24,000 titles – mainly science disciplines but also social sciences (economics, linguistics).
- Springer chosen because of favorable licensing and business terms (full info on cover page, link).
- SCP records for all titles, in local catalogs and NGM.
- In addition to e-version, one print copy for each title goes to Merced – open shelves for circulation by all UC campuses.
- Print on Demand available for $25.

Multi-pronged assessment of the pilot – usage data and cost analysis/cost benefit. Usage is quite high. Also doing a reader survey in Vovici, to begin in October, linked from Springer web site. All campuses have agreed to put a link from home page to survey, and to promote the survey. Also getting response from CDOs, HOPS and RSC on impact of ebooks on collections and instruction, ILL and more.

All of this feedback and data will help guide renewal negotiations. First meeting later this week with Springer re. journal agreement and ebook agreement and open access agreement for journal articles authored by UC. Also, helps us determine if we should pursue large ebook packages from other publishers.

Cost analysis – consideration of how much print was duplicated and costs of processing at both campuses and SCP.

Action Item: Send anecdotal or other feedback on the survey before it goes out.

3. UC Link Types Best Practices Group report -- discussion and what next ? -- sent on 9/7 from Vicki

John –
Table is meant to be prescriptive but not binding. Change the wording to: "While the table is not strictly binding, it is meant to provide guidance".
Put on CAMCIG "Best Practices" web page – one place – and also on SCP cataloging guidelines and HOTS page. Ask CAMCIG if there is another best place.

Origin of group is NGTS and CDL to assess link server support needs. Standardizing amongst the campuses is a question. There is a lot going on now but how much can we require campuses to follow the prescriptive, best practices?

Action Item: Vicki will send response back to group to thank them for the report and let them know we're changing the wording about prescriptive/binding. Then the report will be sent to various groups for posting.

4. Draft RLF questions -sent on 9/9/10 from Karleen

NGM is single lookup. RLF holdings are set up like branch holdings. UCLA/SRLF holdings are complete in NGM. NRLF is 2/3 completed.
Are we supposed to use all means to find duplicate? Or is it "good enough" to do an NGM search and then send if not duplicated? Will we be penalized (counted towards quota) if we send a duplicate? Campuses do not want to get pinged against their quota because of that.

Action Item: Vicki (?) will follow up with RLF directors with the questions Karleen put together.

5. Updates NGTS (Martha, Jim, Amanda, All)

Three task groups worked diligently and submitted final reports (financial infrastructure, enterprise level, new modes for access). May be too soon to get considered at the next UL's meeting next Wednesday. At their October 7 meeting they should be able to review them more closely. Reports include cost analyses; a lot to absorb. Next steps to come.

These groups' charges were to investigate transformative changes – and their recommendations will require UL involvement and support . .

6. Updates Next-Geb Melvyl (John, All)

OCLC is following up on batch loads of serial records from UCSF and others.
Digital Collection Gateway tool – reharvesting everything in eScholarship
OAC, Calisphere, UC Press Books.
NGTS joint TF on LHRs – report on single records for serials, put forth to CAMCIG
Joint ACG-SOPAG meeting on Thursday – Patti giving a report on NGM

7. Announcements –
No LAUC rep appointed to HOTS yet