

HOTS conference call minutes for Nov 14, 2011

Monday, November 14, 2011

Present: Lisa Rowilson de Ortiz (UCB), Xiaoli Li (UCD), Vicki Grahame (UCI), John Riemer (Chair, UCLA), Jim Dooley (UCM), Manuel Urrizola (UCR), Martha Hruska (UCSD, recorder), Anneliese Taylor (UCSF), Catherine Nelson (UCSB), Lai-Ying Hsiung (UCSC), Patricia Martin (CDL), and Valerie Bross (LAUC Representative)

Agenda

1. Announcements

Update on proposed additive LHRs for WEST holdings: word back is that OCLC does not favor the Additive approach. Will likely want to put on future agenda for more discussion when WEST has received more information.

2. General NGTS report (Martha, Vicki)

Martha reported that the NGTS POTs are now issuing monthly updates as of end of October. These are shared on the NGTS blog. NGTS will be gathering information about existing POTs, their charges, Lightning Teams, and the members of these on the NGTS web site.

POT1 is now in process of assembling members and finalizing its charge. It is likely that the POT will include more than 3 members.

Vicki noted that POT6 has a number of Technical Services, HOTS related activities underway, notably the recent survey sent from Manuel.

3. POT 2's direction for a consortial/collaborative cataloging standard (Lisa)

Lisa reported that the 2.2 task list and charge has gone through various iterations. The proposal sent to HOTS is to define a base record that could be used as standard for all consortial cataloging work. Also proposed is a truly minimal record standard that would be used for backlogs, bulk acquisitions, etc. The minimal record standard allows that these records may be enhanced later.

It was suggested that the CONSER Standard Record for serials also be added to the proposal.

Discussion: What about vendor records standards? Use our standard when we have control, but we don't always have control over the vendor products. The standard would be useful to use when making choice of what is best. It could also be used for shelf ready specifications.

Question on how this would apply to non-MARC and for digital standards? Probably will come from POT1; it was also pointed out that crosswalks from MARC to other metadata standards are available and work well for most purposes.

Will still need guidelines for when appropriate for near term to use the brief standard and when long term to use BSR? POT2.2 will be working on this part of their charge.

John suggested that the proposal also include consideration of collection level records in some cases for backlog reductions when working with a large gift or set of materials. Lisa will take this idea back to POT2.2

These standards would be used for collaborative work between campuses or when one campus is cataloging for another campus or all campuses

Patti asked, and Lisa confirmed, that the brief record is intended to be discoverable via Melvyl, and via the original campus OPAC, there is no intention to distribute the records to other campuses for inclusion in their OPACS.

Action: HOTS supports the proposal using BSR (BIBCO Standard Record). Lisa will add mention of CONSER Standard Record for serials.

John will send to CAMCIG for their comment. The document will go to SCP Advisory Committee at a later time.

4. Report on Oct 14 SOPAG-ACGs meeting in Oakland (John, with assistance from Jim, Martha, Vicki)

John reviewed the discussion at the SOPAG/ACG meeting, including the parking lot list of items that might be coming to ACGs at some point, particularly DLSTF2 issues.

Ginny Steel updated the group on the CoULs agenda: interdependence, shared services and resources, and Scholarly Communications. There will be a CoUL/SOPAG retreat on this issue in Feb. SLASIAC is asking for annual reports from CoUL, including metrics. The final revised SLASIAC report is expected in a month or so. The CoUL 2012 - 15 planning document will include provision for annual content updates each June. There will be an internal audience version and an external version for admins and faculty that will be posted on website. ACGs will be asked to monitor and suggest what should be edited or revised each year.

It was reported that savings from the new courier contract (Accurate) partly contribute to new agility funds for new UC-wide initiatives.

SPIP recommendations with comments will go back to relevant ACGs

An update of CDL website, libraries.universityofcalifornia.edu is now underway. Send John suggestions for improvements.

Melvyl Strategic Team (ULs and others) has not been formed; Melvyl Advisory Group not yet formally charged, but is meeting.

The NGTS update included a review of what each of the POTs was working on.

5. Decide whether HOTS would like to comment on:

DLSTF2 final report documents

- [SOPAG Acceptance of DLSTF2 Final Report \(10/06/11\)](#)
- [Final Report \(05/10/11\)](#)
- [DLSTF2 Final Report: CDL Suggestions and Opportunities Pt.1 \(07/25/11\)](#)
- [DLSTF2 Final Report: CDL Suggestions and Opportunities Pt.2 \(07/25/11\)](#)
- [DLSTF2 Response to CDL Suggestions and Opportunities \(08/31/11\)](#)

and/or

“University of California Libraries Discovery Systems and Services: Principles and Goals (July 2011)”
http://libraries.universityofcalifornia.edu/sopag/UCL_Discovery_Principles.pdf

POT1 will be working on the Digital Infrastructure in this area.

On DLSTF2 report, Lisa asked who will be responsible for metadata standards for discovery. When ACGs are asked for comment, John will submit HOTS comment on this since it is not clear.

On the Principles and Guidelines

What should be the outcome of all the various digital projects at the campuses? The report does not seem clear on its recommendation on a Discovery Portal or in Melvyl.

A new discovery system would be yet another new silo. Is a whole new digital discovery system really needed?

DLSTF2 found that WorldCat could not provide all needs of a digital system, but these needs have to be laid out more, better. As reported, there is a question about alignment with DLSTF2 where there is mention of a digital collection, #2 in Next Steps e.g., zoomability

The report seems to recommend a plan to create yet another discovery system.

Comment on Next Steps part needs to be included. HOTS would recommend an inventory of what is needed.

Action: John will work with small group to draft a response: Lisa, John, Patti. The response will be shared with the rest of HOTS later in December.

6. CDC 's "UC Digital Collection Development Strategy," Oct. 22, 2011 (email 11/10; attached)

Does HOTS want to note any technical services aspects or implications?

Comments?

Lisa wishes the CDC strategy could be one unified document with the DLSTF2 report since they are so closely related. Given the different timelines of the two reports, it was noted that the CDC strategy should reference the important link to DLSTF2.

John asked just what a coordinated digital collection means? After the fact, or coordinated in the planning and development, trying to avoid unnecessary duplication? Is the report meant to provide guidance on what we should be collecting?

Jim noted that the document is meant to be more a strategy than a policy.

4th bullet: collection analysis using LC classification at top level would help with analysis

HOTS will want to comment if/when SOPAG does call for comments

Action: Vicki to let SOPAG know that HOTS will have comments on this document, should a call be issued for comments.

7. Melvyl report (Patti)

Patti reported that the Melvyl Advisory Group (MAG) will be meeting for 2nd time tomorrow. She also reported that there will be an OCLC install of new features this weekend. UC needs more advanced notice for features going in. There is often not enough time to evaluate and give feedback. So far, the process for OCLC optional features has been to vet using MAG to review and send as needed to the right UC groups.

For features that are not optional, the approach is for CDL to just test and announce.

Patti now meets monthly with OCLC Project Coordinator and OCLC Local Ops team. It remains to be seen how UC will get regular input into feature development. Not sure there is currently a vision for UC working closely with OCLC for new features.

There were a number of questions discussed:

Search results for known item search searches, Hathi integration, how OCLC does FRBRizing.
Might help with Expert Searcher tracker : who sets UC holdings?
Lai-Ying asked about feedback, how to get questions and comments to OCLC and get responses back to the user?

Patti counsels patience that UC has not exhausted all possibilities for making improvements to Melvyl and strongly recommends that all keep sending feedback noting what we want improved. The ViewNow feature will help with what is fulltext. CDL will be reporting on it to HOPS this week. Hoping that turning this on will improve discovery, particularly for Hathi in WorldCat. Without a new Executive Group in place, progress on some of these strategic issues is challenging.

8. Other

Patti reported on a CDL proposal to RSC recommending moving backend of VDX from being hosted locally to being hosted by OCLC. If agreed on, this would happen during the summer 2012. UCD and UCSB reporting requirements would be a part of the OCLC contract.

Update: OCLC has agreed to do this.

One implication noted was that campuses would need to continue reporting location changes to CDL.

Next meeting: December 12

John and Patti out, Vicki will chair. Depending on agenda, Patti will ask a CDL staff member to attend in her place.