Heads of Technical Services University of California Libraries

HOTS meeting
October 14, 1999

Present: R. Alan (D - chair/recorder), A. Barone (B), K. Cargille (LAUC), C. Clark (I), K. Coyle (CDL), N. Douglas (R), C. Hixson (UCLA), C. Johns (UCSB), B. Miller (SD), L. Millsap (SC), P. Wakeford (SF)

1. Carol Hixson welcomed as UCLA's new HOTS representative.

2. CCA (Centralized Cataloging Agency) pilot project:

A test file of 905 records prepared by UCSD (CCA) and delivered to CDL. The file was made available to UCD and UCB. UCD successfully loaded the file into a resource database in their DRA system. Staff have just begun working with the file, moving catalog records or specified data elements from the CCA records into their DRA catalog. Alan pointed out that UCDs environment differs from other campuses. All agreed that it will be important to include cost estimates at the campus level, even though the costs will vary between campuses depending on the system configuration. Miller to prepare report on the findings of the centralized cataloging model for the November 19 SOPAG meeting with help from C. Graham and P. French.

3. CDL Cataloging Guidelines:

The CDL Cataloging Guidelines had been approved by SOPAG. HOTS delegated responsibility for appointing
task force to maintain guidelines, communicate changes and serve as resource team for questions from UC and non-UC contributors, and recommend to SOPAG additional categories of electronic resources that should be addressed, e.g. government documents. HOTS agreed that the Task Force on Electronic Resources (TFER) continue in name with C. Graham (UCSD), L. Hayman (UCSB), C. Hixson (UCLA and HOTS liaison), and P. French (UCD). C. Clark will serve as the SOPAG liaison for the group. HOTS agreed that TFER should only be responsible for recommending next steps and that additional task forces would need to be formed to address other categories of electronic resources.

ACTION: Alan will draft a charge for TFER and forward to HOTS for comment.

ACTION: Alan will send out announcement to HOTS, UC Heads of Cataloging, and Laine Farley announcing CDL Cataloging Guidelines.

ACTION: HOTS to provide Alan with names of contacts for communication regarding CDL Cataloging Guidelines. A listserv or e-mail list will be established.

4. Wade-Giles to pinyin conversion:

Miller reported on last weeks meeting at LC and other updates. LC has established schedule for conversion and does plan to convert entire file sometime in 2000. OCLC will not begin planning a conversion until June 2000 at the earliest due to the need to devote resources to Y2K. OCLC may offer to provide snapshot of converted bibliographic records, converted bibliographic and authority records, or a library may need to pull records for processing by OCLC and then reload. The later could be expensive if additional MARC load programs need to be purchased. Most campuses are currently converting geographic headings based on LCs conversion. For at least the next year, catalogs will include different forms of romanization. HOTS agreed that it is best to wait until LC has completed conversion and OCLC announces its conversion plans sometime after June 2000.

Barone recommended the C.E.A.L. website as an excellent resource.

URL is: <http://www.sois.uwm.edu/jeong/ceal/>

5. Metadata training:

Coyle reported that HOTS/LTAG Metadata Training Task Force will have conference call on October 15. HOTS agreed that training should not be limited just to catalogers but cover different areas. Would be desirable to have training sessions introducing general issues and concepts, current UC use of metadata, and sessions addressing more specific technical issues. All levels of staff from different areas should be considered, not just catalogers. A series of half-day and one-day workshops at multiple locations should be planned. The Task Force should include cost estimates if possible. Hixson reported that the OCLC Institutes did present sessions at UCLA.

6. CDL system planning:

Coyle reported that task force with representation from each campus charged to coordinate how the RFP will be revised. Final model not in place. Should CDL consider total vended system that incorporates for example the OPAC, A&I databases, CDL Directory, etc. or a partial that fits into systems, e.g. Z39.50 protocol? A very short timetable has been established.

7. OCLC CORC:

Miller reported that UCSD has joined CORC and received training last week. HOTS had discussed UC participation in CORC at the April meeting but recommended not proceeding until OCLC was able to load CORC records into WorldCat. It now appears that OCLC will be able to export records to WorldCat and/or local systems. CORC still in project mode but expected to be in full production mode soon. Barone reported that the Bancroft Library is considering joining CORC with goal of converting EAD headers into CORC records. Miller recommended that other UC campuses consider also joining CORC.

8. UCSD Portal Project:

Miller reported on development of UCSD Portal Project. The purpose of the project is to develop a more efficient search gateway to all types of resources, e.g. CDL, Rodger, value-added database, locally-hosted databases, etc. Steering Committee that includes staff from all technical services, systems, public services, and collection development has been working on the plan. OCLC CORC is a potential component, but immediate use is still under debate. UCSD has hired three new programmer/analysts to provide direct or indirect support for project.

9. III/LARS interface:

Interface being tested at UCSD and UC Bindery (Culver City). Purpose is to electronically transfer bindery information that appears on binding slips from III binding module to LARS system at Bindery. The UC Bindery uses the data to print spine title information (e.g. title and volume enumeration) on volumes. The interface should eventually result in lower binding costs.

10. Electronic resources: how is your library handling:

Clark asked how other campuses are organizing technical processing of electronic resources. UCI has established an Internet Processing Work Group to develop workflows. Developed a checklist of processes to do which Clark will share with interested HOTS members. UCB currently has distributed processing but has discussed the possibility of creating an electronic resources librarian position to facilitate handling this workflow. UCSD has centralized ordering and cataloging and is currently advertising for a electronic resources and serials cataloger. UCSC has centralized processing and is currently advertising for electronic resources cataloger. Other campuses varied in approach but agreement that electronic resources has added new dimension to technical processing (e.g. licensing).

11. Serial vendor mergers:

HOTS discussed impact of RoweCom's acquisition of Dawson ISG and the Blackwell/Swets merger.

12. Roundrobin:

UCB: Pat Iannuzzi appointed AUL for Doe/Moffit and Isabel Sterling AUL for Public Services. AUL Collections position will be reopened. Vice-Chancellor has funded fourteen new librarian positions over the next two year period.   Acquisitions and cataloging units are beginning to experience increases in workloads.   Backlogs are beginning to develop. With the increase in the acquisitions budget there is concern that the backlogs may increase.

UCR: Working with EBSCO Online.   Staff time devoted to database clean-up following INNOPAC implementation being diverted to cataloging backlogged materials.

UCI: Vicki Grahame appointed head of cataloging and will start Jan. 1. Technical processing manual should be available online next month. Currently beta testing INNOPAC 2000.

UCLA: Cindy Shelton appointed AUL Technical Services and Collections. Record number of simultaneous position searches underway including recruitment for head of Special Collections.   TAOS went live for
cataloging and circulation on September 27 and ORION I to be brought down on October 28.   TAOS OPAC not yet available.   DRA has yet to write specification for output records and there will probably be a six month
period when UCLA records will not loaded into MELVYL.   OCLC record loader works well. No TAOS authorities module at this time.

UCSB: Recruiting for AUL for Information and Research Services.   Have upgraded NOTIS and will remain through 2000 waiting on DRA development.

UCD: Reviewed current status of ILS to determine if any would meet UCDs functional requirements. Will probably be preparing an RFP for vendor authority clean-up.

UCSC: Currently recruiting for electronic resources cataloger.

CDL: Recruitment of CDL technical director nearing completion and appointment should be made soon.   Two programmer positions being hired for MELWEB.   Two new positions should be posted soon e-scholarship and coordinator of digitizing projects.

UCSD: 190,000 catalog records for 35 mm slides have been added to INNOPAC (not yet MELVYL). May be used as basis for project to digitize slides. Development of Chinese digital library progressing.

UCSF: Retained Rowecom as primary serial vendor. Have purchased INNOPAC Millenium Circulation. Presently recruiting for LA IV, Database/Library Systems Applications position. Should be interviewing UL candidates in October/November.