

**NEOS Technical Services Standards Committee
Minutes
October 2, 2013, 0930-1130h
University of Alberta, Cameron Library**

Present: Jane Starr (AGL) – Chair,
Anne Carr-Wiggin (NEOS)
Darel Bennedbaek (CUC)
Donna Gordon (Alberta Health Services)
Gisele Ramgoolam (Norquest)
Jill Day (MacEwan)
Michael Betmanis (U of A)
Myrna Dean (Concordia)
Sharon Marshall (U of A)
Tara Sommerfeld-Boizard (Covenant Health)
Vanessa Bangay (MacEwan guest)

Teleconference: Audrey Lyons (AITS)
Della Nelson (Keyano)
Lisa Wakefield (RDC)
Nicole O'Connor (GPRC)
Scott McKay (Olds)
Sheila Heit (Lakeland)

1. Additions to/approval of Agenda and Minutes

Items added to the agenda:

- 8. AEUSJ records**
- 9. MacEwan items that have been attached to AEUSJ records**
- 10. 776 tags**
- 11. OCLC WorldShare(R) Metadata Collection Manager**
- 12. Technical Services Sessions at NEOS mini-conference**
- 13. Volunteer for Chair**

Agenda approved with additions.

Minutes from the October 3, 2013 meeting approved with minor changes.

2. Update cataloguing policy document to include RDA records (Sharon)

All attendees agreed to the proposal to add the following text to the cataloguing policy document: Accept AACR2, "hybrid" or RDA catalogue records for copy cataloguing. ("Hybrid" records are records in WorldCat that have been globally updated to include the new 3XX fields, have abbreviations spelled out, Latin abbreviations changed to English, etc. They are coded as AACR2 records.) For original cataloguing create AACR2 or RDA records. Do NOT degrade RDA records.

Discussion regarding a timeline for creating only RDA records resulted in agreement of April 1, 2014 as a target date with the understanding that some libraries may not be able to meet this date. Coaching and support will be available to any who require assistance.

3. Genre headings (Sharon)

A few years ago, LC introduced field 655 to allow cataloguers to differentiate between subjects, genres, and terms. LC has an ongoing project to establish genre/form terms in a separate thesaurus (LCGFT). So far they have added terms to their list for films, non-musical sound recordings, law, and cartographic materials. Next they will work on music, religion and literature. After some discussion, it was decided that we will start (or continue) using these terms when they are available and we should use field 655 whenever we are describing the form or genre rather than the subject of the work. Although it is perfectly acceptable to create new terms, we will refrain from using generic terms such as 'e-book' or 'video recording' and will follow LC's examples.

4. Magnetic media item type (Sharon)

This initiative has arisen from a desire to increase self-serve circulation. The self-serve stations can damage magnetic media. The purpose of creating a new item is so that items such as DVDs and CDs can be checked out via self check and to prevent damage to libraries' materials when requested pick up at any location with patron self check out. When magnetic materials or books containing magnetic accompanying materials are requested by patrons, the patron will be redirected to bring the items to the circulation desk for charging.

A new item type has been created in Symphony: **MAG_MEDIA**. It is to be used for magnetic materials such as cassette tapes, VHS tapes, floppy disks and similar items. The U of A has been updating their records to reflect this change. Most of this work has been done globally but for VHS tapes, cassettes, floppy disks that are accompanying materials with books or in kits they have been manually reviewing the records.

The U of A has offered to change the NEOS library records for DVDs and CDs globally at no cost and will provide lists of titles with accompanying magnetic media so that other libraries may identify and manually review the remaining kits and accompanying materials.

Action: Each library should contact Sharon with requests for global item changes and/or lists of titles with accompanying magnetic media.

5. NEOS Free E-resource Library (Sharon)

With approval from the NEOS directors, the U of A has created a NEOS Free E-resource Library. With the creation of a new library policy in Symphony for this new library, no library would need to add its own copies to the title records of free items. Each NEOS partner may elect to include the new NEOS Free Access library in its library search group so that the free resources are included in searches limited to that institution. Similarly, any NEOS partner could opt out of including the NEOS Free Access library in its library search group if the addition of these resources would be in any way problematic to search results.

The records will be bulk loaded. In the future, a policy will be developed for the addition of individual items.

Action: Each library should email Sharon with instructions regarding whether or not they wish to have the holdings of the Free Access Library included in searches limited to their institution.

Further, the NEOS partners that already have Internet libraries in Symphony (AGL, GMU, UAL) could elect to continue adding a copy for their Internet libraries if they want searches limited to those specific libraries to pick up the free resources.

6. NEOS Last Copy Policy (Sharon)

Sharon presented the current version of the NEOS Last Copy Procedure. Discussion followed regarding its clarity and currency. Members agreed that the document will be accepted as reviewed and will be considered current as of October 2013. The procedure will be posted online for all staff to access.

Last Copy Procedures: Information for NEOS Library Staff Reviewed October 2013

If your library is considering discarding an item which is the last copy of a title in the consortium, you may offer the item to the University of Alberta Libraries as a donation, following their normal book donation process. This would normally happen if the item would be discarded under your regular policies but you believe it would still be valuable to the consortium.

Please note that the University of Alberta may not necessarily accept the item. A print copy (book or journal) will be considered for retention even if the UofA has electronic access. If you wish to have the option of retaining the item should it not be accepted, please make sure this is communicated during the donation process. Once donated, the item is held by the University of Alberta, rather than the donating library.

Donated materials should be shadowed in the library database by changing the location to IN_PROCESS so they do not appear in the public catalogue. Do not mark items as discarded as the records would be deleted when the discard report is run each month.

For the special project of weeding for the AGL consolidation, call Sharon if you are donating serials. Put serials in special boxes.

Please contact Sharon Marshall, sharon.marshall@ualberta.ca, Tel: (780) 492-8251, in advance of making the donation.

Additional guidelines

Please do NOT send any of the following even if they are the last copy in the NEOS database:

- Books in bad condition*
- Photocopies*
- Business administration / personnel administration / inspirational management texts*
- Computer manuals*
- "Dummies" or "Complete idiot" books*
- Draft reports*
- Non-Canadian government documents and non-official reports*

- *Superseded monographs where there are records for later editions in the catalogue*
- *Ephemeral literature for the layman*
- *Discussion / working papers from various university departments*
- *Documents locally printed from the internet*
- *Journal off-prints*
- *UofA theses (we have them all, some are not catalogued)*
- *Agdex (AGL NCC sends them all to us)*

Other reminders:

- *All items should be changed in WorkFlows to location IN_PROCESS*
- *Separate monographs and serials*
- *Send uncatalogued items separately addressed to UofA Free & Gift*

7. Symphony Location and Holding Code clean-up (Sharon)

Cleaning up locations and holding codes in Symphony was discussed and although it is not an urgent matter for anyone, it is a project that the group feels should be pursued. Sharon indicated she will distribute a list of proposed location deletions so that all members can review them prior to removing them. Likewise, Sharon indicated she would distribute a list of holding codes prior to removal.

8. AEUSJ French records (Jill)

AEUSJ (University of Alberta, Faculte St. Jean) records are considered unique because the cataloguing language is French, please do not add items to these records. However, if the cataloguing language is English the records are not unique and other libraries' items may be added to the record.

9. MacEwan items attached to AEUSJ records (Jill)

MacEwan staff continually run across MacEwan items that have been attached to AEUSJ records. In these instances, the English language cataloguing record has been removed and they are left with items attached to records with cataloguing data in French, French language subject headings, etc. When they happen upon such things, they must then find a proper English language record and move our items over. MacEwan staff were told that U of A was going to run a report to locate all these errors and come up with a process to correct them.

The status of this project is that a report has been run and, in the future, the records will be merged.

10. 776 tags (Jill)

When imported records include a 776 tag (which contains online availability information), the tag should be deleted. Sharon indicated that it would be added to the 'junk tags' list and stripped.

11. OCLC WorldShare(R) Metadata Collection Manager (Sharon)

Sharon shared information from a webinar regarding the OCLC WorldShare Metadata Collection Manager and the improvements to the the quality of the MARC records. Sharon

has invited committee members to watch the webinar and provide comments regarding the service which could improve our records with very little work on our part:

<http://www.oclc.org/en-US/events/2013/CollectionManagerwebinar091113.html>

12. Technical Services Sessions at NEOS mini-conference (Anne)

Consider presenting at the next NEOS mini-conference! Please send Anne any ideas you have for presenting at the mini-conference on the topic of technical services.

13. Volunteer for Chair (Anne)

Jane Starr is the current chairperson for this committee. After several years of dedicated service it is time for someone else to take on the duties. Anne is looking for volunteers to fill the role. If any current members are interested in learning more about the position or volunteering please contact Anne.