

NEOS TECHNICAL SERVICES COMMITTEE MEETING – OCTOBER 31, 2017

MINUTES – Room 7-273P City Centre Campus MacEwan University

Present: Nancy Gerhart (AGL); Darel Bennedbaek (Burman); Myrna Dean (Concordia); Tara Sommerfeld (CHS); Audrey Lyons (AI) **Minutes;** Nicole O'Connor (Grande Prairie); Donna Gordon (AHS); Corinne Hope (Keyano); Jolene Linfitt (King's); Laura Somerville (Lakeland); Susan Jones (MacEwan) **Chair;** Gisele Ramgoolam (NorQuest); Louise Brittain Boisvert (Olds); Ian Bigelow (U of A); Karina Dunn (Vanguard); Anne Carr-Wiggin (NEOS).

1. Call to Order/Welcome – Thanks expressed to Laura Somerville for being past chair. Minute Taker – Audrey Lyons

2. Minute Taker – re-instituted rota of minute takers for meetings (See Appendix A), remove Canada Justice from rotation and resend.

3. Attendance Roll Call – introductions made.

4. Review and Additions to Agenda – due to length, changes may occur. Agenda item #7 moved to the bottom. #14 moved to become 8.5.

5. Approval of draft minutes from March 14, 2017 meeting – *one correction 6. - edit to add URI's to authorities - also be added to bibliographic records. Add correction to minutes to Anne for reposting.*

6. RDA Toolkit - Subscription – 7 libraries currently participate in a subscription through NEOS (receive a 5% discount), other libraries have subscriptions through TAL (with a discount). As this is referenced heavily in the new Standards document developed by the NEOS Standards Sub-Committee a discussion was held on whether or not it should be required/mandatory for all member libraries to have access. If mandated would there be a way for costs to be shared i.e. added to NEOS technical fees, partnership between libraries that have a subscription (provide guidance)? 3 libraries identified (from members present) that do not currently have a subscription. Many variables which include level of cataloguing done, volume, staff usage. *Decision made to take it to the Director's meeting and have them decide if it should be mandated that each member library have access to the RDA Toolkit (print or online).*

7. NEOS Miniconference and/or Technical Services workshop? (Moved to end of agenda, item #21).

8. NTSS update – The NEOS Tech Standards Subcommittee (NTSS) presented an updated set of cataloguing standards (entitled: Document 1 Cataloguing Standards). A very helpful Executive Summary, as prepared by Brian Stearns, was also provided and concisely outlined the significant changes in Document 1. Links were provided to the online versions of the new Document 1: Cataloguing Standards and the Executive Summary. Thanks given to the members of the subcommittee involved in updating the document. The NTSS is looking for feedback on the changes. Information/explanations provided on the changes made from the existing document, included:

Bullet 1 – following guidelines easier to maintain when using international standards.

Bullet 2 – committee wants to try this, need to evaluate the volume – will involve new materials, will not be retrospective. U of A will work with vendors (e-books). Any added copy records at this time not considered mandatory (time restraints) for doing upgrades. When you are doing copy cataloguing seek out RDA records where possible.

Bullet 3 – training already an obligation of Standards Committee/Group – but does not include “how” to be a cataloguer, but how to integrate into NEOS environment/workflows. Libraries are expected to have own expertise in-house and NEOS supports training of workflows. *Adjust terms of reference document: Facilitate support to staff members requiring cataloguing expertise, i.e. set up a buddy-library, be involved in assigning of a buddy library. To be presented at Director’s meeting.*

Bullet 4 – the same as prior standards document.

Bullet 5 – use discards process versus delete.

Bullet 6 – vendor records accepted as delivered, not required to follow the standards.

Bullet 7 – treat on a case by case basis by the committee to determine enforcement.

Bullet 8 – U of A owns authority records.

Bullet 9 – responsibility of U of A to make data available. More information needed to change mandate.

Bullet 10 – explanation provided.

Edits:

4.5 – add a note regarding deleting local fields, move from 2.6.1.1. Field 090. Move to discard section, 2.4.3 – record deletion, cross reference 2.6.1.1 notes.

Approval of new document deferred to next meeting. Updated document will be supplied prior to meeting.

8.5 Sirsi Authority Update service (agenda item moved up from #14 on agenda) – information sharing: Sirsi authority updates are now in production and continue to run. The Sirsi update service is very lightweight, placing emphasis on either further development with Sirsi, development with other workflows in house (UofA) for which there is limited staffing, or consideration to be given to

working with another authority vendor. Potentially further authority work could be done in conjunction with URI enrichment. All these options are currently being considered and feedback is welcome on any noted issues related to authority updates. *Feedback requested from members. U of A will report back as to when the service does run.*

9. 090 institutional maintenance – reminder to update 090 fields and local notes fields in bib records. Some members unaware this was required when records are discarded. IT options being explored to automate process, to streamline discard process. This step is only required if library has holdings. Discussion on need for 090 field – what is it used for, investigate consequences of removal of 090 field. Are there other local fields that should be considered (590, 856, 690)? Possible that other fields could be tagged for developing an automated process in the future. Manual work is not an option.

10. Connexion and Records Manager – *deferred to next meeting.* OCLC Connexion is headed towards the end of its service life and Records Manager is slotted to be the replacement. With this transition coming UofA has been working with OCLC to test Records Manager for our workflows. John Chapman (OCLC Senior Products Manager, Metadata Services) will be visiting UAL in November to review progress for this transition. The visit should allow time for other discussions and suggestions from NEOS-Tech are welcome.

11. Holding Updates to LAC – Information about LAC's move to OCLC can be found [here](http://www.bac-lac.gc.ca/eng/services/national-union-catalogue/Pages/questions-answers-contract-oclc.aspx#data-migration) <http://www.bac-lac.gc.ca/eng/services/national-union-catalogue/Pages/questions-answers-contract-oclc.aspx#data-migration> What this means for OCLC member libraries and non member libraries in NEOS is still not clear, but hopefully more information will be available soon. Meeting with John Chapman from OCLC forthcoming. Not all sites have holdings in OCLC, U of A quit sending updates of information to Amicus in 2010, how does this effect the transfer that is being done. An example – are the holdings that are being transferred current if updates have not been done since 2010? *Ian to investigate and report back. To be added to next agenda.*

12. Blue Cloud Analytics – recruiting for coordinators from member libraries through Directors in order to set up accounts, U of A aiming for December for a creation of a set of base reports. Director's Station will be available until May 2018.

13. Decolonizing Description: *deferred to next meeting.* Please review slides from Netspeed 2017 below and consider the following recommendations from the Decolonizing Description Working Group

[Decolonizing Description: Changing Metadata in Response to the Truth & Reconciliation Commission \(Netspeed 2017\)](https://librarytoolshed.ca/content/decolonizing-description-changing-metadata-response-truth-reconciliation-commission)

<https://librarytoolshed.ca/content/decolonizing-description-changing-metadata-response-truth-reconciliation-commission>

- a. That UAL take the lead on working with Indigenous communities and partners to

develop revised subject headings reflective of the Alberta and appropriate Northern contexts.

- b. That UAL engage an individual to coordinate and conduct consultation and outreach which is groundwork critical to the success of moving forward with this project.
- c. That UAL retroactively apply revised subject headings to appropriate library resources, including cataloguing records within the ILS, and metadata applied to the institutional repository, archives, and locally digitized collections.
- d. That going forward, the same approved subject headings will be applied to new content added to our library resources.

Challenges:

- a. staff training
- b. automated system updates and infrastructure
- c. multiple repositories and user communities
- d. creator contributed metadata
- e. developing shareable workflows and tools

Opportunities:

- a. reconciliation with Indigenous user communities
- b. more inclusive repository content and services
- c. cooperation with like minded institutions to create effective approaches
- d. developing shareable workflows and tools
- e. being part of a community making positive change

14. Sirsi Authority Update Service (moved to agenda item #8.5)

15. URI enrichment: *deferred to next meeting.* Planned URI enrichment for all MARC data (likely alongside authority work) pending:

1. Assessment of existing authority control project
2. Assessment of pre vs. post MARC - LD conversion URI enrichment efficacy
3. Assessment of in-house vs. vendor workflows
4. Approval of PCC MAC proposals - Check!

Please see Proposals 2017-01/08/09 [here](https://www.loc.gov/marc/mac/list-p.html#2017) <https://www.loc.gov/marc/mac/list-p.html#2017>

16. BIBFRAME and Casalini SHARE Virtual Discovery Environment – *deferred to next meeting.* For further context please see:

[Linking Out, Linking In: Preparing for Linked Data at the University of Alberta \(Netspeed 2017\)](https://librarytoolshed.ca/content/linking-out-linking-preparing-linked-data-university-alberta)

<https://librarytoolshed.ca/content/linking-out-linking-preparing-linked-data-university-alberta> & [Casalini SHARE Virtual Discovery Environment website](#)

<http://share-vde.org/sharevde/clusters?l=en>

UAL has been participating in the Casalini SHARE VDE project and experimenting with similar in house processes. Deliverables from the project to date have included:

Phase 1:

- A. MARC for 1985 and 2015 imprint data returned with URI enrichment
- B. Imprint data returned in bf:2.0
- C. Entity identification
- D. Reconciliation of data clustering
- E. Release of SHARE VDE with searchable imprint data
- F. Access to data through Blazegraph

Phase 2:

- A. Creation of relationship database to support entity identification
- B. Improvements of processes from phase 1 for MARC and bf:2.0 data
- C. Basefile to be returned in bf:2.0
- D. Web discoverability through application of other ontologies such as schema.org

From phase 2 deliverables UAL has just received collection level data in bf:2.0 from Casalini and work continues to see if similar processes are practical in house ([See here](#))

<https://github.com/ualbertalib/metadata/tree/master/metadata-wrangling/BIBFRAME>

will have all MARC converted to BIBFRAME 2 with further enrichments and enhancements to the data set. If UAL takes this further and pursues a project with LC and other institutions to begin original description and collection maintenance in this format, what will this mean for NEOS? With our collection in bf:2.0 and once we establish a system for ongoing updates, we need to consider:

1. Is it worth testing original data creation with bf editor?
2. How will copy cataloguing work in this environment?
3. Pilot projects with vendors for provision of data in this format?
4. How/When can we set-up Blacklight (or other tools) to run on this data? What does this mean for the ILS?

Casalini SHARE VDE Phase 3:

Use cases for phase 3 are still being developed, but the plan is to

- 1) publish all participants data in the tool,
- 2) incorporate ability to batch update the record set with library exports,
- 3) develop ability to return enhanced data back to libraries in an automated way,
- 4) develop ability to edit the information in ShareVDE through cataloging tools,
- 5) develop capacity for reports of some type and
- 6) develop original cataloging workflows for SHAREVDE

Consideration should be given to this project in terms of what it would mean for NEOS if UAL moves toward linked data implementation and whether NEOS as a whole should be considering participation in phase 3 of the project.

17. ALL: Large Research Libraries Shared Portal – *deferred to next meeting*. An initiative of Big Heads to provide alternate copy cataloguing options by consolidating large research library (Big Heads) member libraries for search through a single Z39 target. This Z39.50 tool is still in development and feedback is welcome. Some issues being considered:

- a. How to sort and filter results given the large data set
- b. How to output data in multiple formats (MARC, BIBFRAME)
- c. Utilization within ILS vs. standalone GUI

18. Northern Lakes College – *deferred to next meeting*. NEOS has a new member and it may be worth taking a few minutes to review the process of merging collections along with any necessary follow up.

19. NEOS Blacklight – *deferred to next meeting*. The NEOS ILS Interface Working Group is continuing work on Blacklight for NEOS. NEOS Tech should discuss how this group relates to our work and what the replacement of iLink by Blacklight for NEOS members could mean.

20. Terms of Reference – *deferred to next meeting*. Is it time to review the TOR for NEOS Tech in light of Blacklight usage for NEOS and other ongoing developments. *Some edits to the TOR are indicated from the discussion in the other agenda items.*

https://www.neoslibraries.ca/wordpress/wp-content/uploads/2016/04/Technical_-_Services_2009.pdf

21. NEOS Miniconference and/or Technical Services workshop? (agenda item #7 moved here): *Deferred to next meeting*. Any ideas for a conference session or preconference - for example there was a suggestion in the miniconference evaluations for a session on serials.

Teleconference Access Instructions:

1. Enter the dial-in number and follow the voice prompts.
2. When prompted, enter your Conference Access Code followed by the # sign - Participant Access code: 1232737 #
3. In the event you are unable to connect to the conference, please stay on the line and you will be automatically transferred to a TELUS conference representative.

4. If you require assistance at any time during the conference, press * 0 (star zero) for a TELUS conference representative.
5. Each caller can mute their own line by pressing * 6 (star six). To remove mute, press * 6 again

Dial-in Phone Numbers:

1-877-385-4099 Toll Free (Canada & USA)

780-421-1483 Edmonton

403-232-0994 Calgary

Appendix A – Schedule for Meeting Minutes Takers

Alberta Government Library	October 14, 2015
Alberta Health Services	July 15, 2009
Alberta Innovates Libraries	October 31, 2017
Burman University Library	August 31, 2016
Concordia University of Edmonton	January 24, 2018
Covenant Health Services	next
Grande Prairie Regional College	
Keyano College	December 1, 2010
The King's University	October 7, 2009
Lakeland College	
MacEwan University	April 20, 2015 \ June 18, 2014
Newman Theological College	
NorQuest College Library	March 14, 2017 \ December 3, 2014
Northern Lakes College	
Olds College	
Red Deer College	
University of Alberta	February 2, 2009
Vanguard College	
Unidentified Meeting Minutes Taker	October 2, 2013 \ October 3, 2012
Justice Canada	April 1, 2009

