NEOS TECHNICAL SERVICES COMMITTEE MEETING

Minutes

Tuesday, May 29, 2018

(9:30-11:30 am)

Location: MacEwan University, City Centre Campus, Room 7-221

Present: Susan Jones (MacEwan) Chair, Paulette Pelland (Covenant Health) Minutes, Lisa Drysdale (Alberta Government Library), Darel Bennedbaek (Burman), Myrna Dean (Concordia), Jolene Linfitt (King's), Gisele Ramgoolam (NorQuest), Ian Bigelow (University of Alberta), Karina Dunn (Vanguard)

Teleconferences: Audrey Lyons (Alberta Innovates), Nicole O'Connor (Grande Prairie Regional College), Corinne Hope (Keyano), Laura Somerville (Lakeland), Shiloa Thomas (Northern Lakes), Michael Baird (Olds)

Guests: Brian Stearns (University of Alberta), Vanessa Bangay (MacEwan)

Regrets: Anne Carr-Wiggin (NEOS Manager), Donna Gordon (AHS), Jim Derksen (Newman), Tara Gunsch (Red Deer College), Michael Betmanis (University of Alberta)

1. **Call to Order / Welcome**

2. **Attendance Roll Call**

3. **Review and Additions to Agenda**

4. **Approval of draft minutes from January 24, 2018 meeting:** Minutes were approved

5. **Outstanding business from January 24, 2018 meeting**

    a. OCLC Connexion and Records Manager (Gisele Ramgoolam, NorQuest)
    Holdings will be discussed in today's agenda. No further updates for Connexion at this point. Connexion and Records Manager are both still functional at this time.

    b. Terms of Reference – deferred to next meeting

6. **Last Copy Procedure**: Procedure clarification required for 'Last Copy' items sent to BARD\RCRF, especially for making sure that OCLC holdings for the original owning library are deleted when the item is moved to BARD\RCRF (Myrna Dean, Concordia University)

   - Concordia holdings need to be removed from records for items donated to RCRF. Concordia marks these items last copy then sends them away. U of A needs to move items to RCRF so that the OCLC record will properly reflect that Concordia has been removed as a location. EBSCO Discovery Service records have a monthly refresh, but this does not include Concordia.
   - Alberta Government Library inquired if Inventory List is required for last copy items.
   - Donations should be sent to Quinn at U of A.

   ACTION: Review and update Last Copy Procedure for U of A (Ian).

7. **Local Subject Heading: Concordia University of Edmonton dissertations|5CaAEC:** For Approval, and addition to Appendix E in Document 1 Cataloguing Standards (Myrna Dean, Concordia University)

   - Concordia University Dissertations subject heading was accidentally not included in last Cataloguing Standards Document 1. This subject heading was created by Brian Stearns. All in favor.

   ACTION: Brian Stearns will update Document 1 Cataloguing Standards.

8. **NEOS Blacklight Project Update: (**beta version https://catalogue.neoslibraries.ca) (Karina Dunn, Vanguard College)

   - Blacklight is the new user interface for the NEOS catalogue. On the beta version there is a link to a survey and an opportunity to provide feedback. Please submit questions and issues. Look up random books and unique items from your collection to see if they will display correctly. Check links.
   - Karina Dunn is a member of the Blacklight committee. There will be afternoon sessions on Blacklight at the upcoming NEOS Preconference. Blacklight will continue to be improved over the summer and they are hoping for a soft launch in September. Ian Bigelow stated that there has been a lot of discussion at U of A Libraries regarding Blacklight. Karina says that feedback from the U of A librarians has been incorporated.

9. **Voila - National Union Catalogue – Library and Archives Canada:** (Ian Bigelow, University of Alberta)

   Voila is the new catalogue replacing AMICUS. Ian Bigelow has concerns about software bugs (such as geographic locations), not all libraries being able to submit holdings, and a gap of institutions that do not pay for OCLC holdings.

a. Holdings for non-OCLC members

- Holdings for non-OCLC members are not loaded in Voila. Audrey Lyons (Alberta Innovates) was surprised at this and had not been aware. Ian has heard complaints from across the country about this issue. The problem is being brought forward to Library and Archives Canada. Ian wonders if NEOS Technical Services Committee should draft a statement addressing the concerns of non-OCLC member libraries.
- Michael Baird (Olds College) – Looks like AMICUS records for Olds College were migrated to Voila but holdings are dated. Michael is not sure if Olds is an OCLC member.
- Myrna Dean (Concordia) states that there was a problem at one point with discards in OCLC. This may be an OCLC problem, rather than an AMICUS to Voila migration problem.
- Audrey Lyons (Alberta Innovates) asked about what the U of A has done with AMICUS. Ian states that Voila needs to catch up with U of A holdings. There is a gap as AMICUS records are out of date.
- Laura Somerville (Lakeland) – Lakeland is an OCLC member but some of their holdings are not showing up.

b. Access to copy cataloguing and bibliographic data.

- Libraries will not be able to copy catalogue from Voila unless they are an OCLC member.

ACTION: Ian Bigelow will draft a statement to submit to Library and Archives Canada on behalf of NEOS Technical Services Committee. He will bring the draft to committee for discussion. Darel Bennedbaek and Myrna Dean will help Ian with the statement.

ACTION: Brian Stearns will discuss issue at June Catalogathon.

9.5 OCLC Holdings: (Agenda item #18 moved up to here during meeting): Follow-up discussion from Data Sync and tidying up holdings information (Ian Bigelow, University of Alberta)

- Myrna Dean (Concordia) – part of OCLC holdings have been fixed, but not all. Concordia plans to do a reclamation of OCLC records (to refresh their OCLC holdings). OCLC's WorldCat is Concordia's primary discovery tool.
- Ian Bigelow (University of Alberta) – OCLC holdings are "messy". He is forwarding individual records without OCLC numbers to OCLC and would like to see a more concerted effort to correct errors.
- Lisa Drysdale (Alberta Government Library) – Some of AGL's records are not

showing up because they were marked as NEOS Free. Her numbers of records are small and she is correcting these individually.

- Karina Dunn (Vanguard) – how do these OCLC issues impact Voila and Library and Archives Canada? This is problematic.

10. **Catalogathon:** Thursday June 7, 10am-4pm, University Alberta Campus, facilitated by Brian Stearns - (Brian Stearns, University of Alberta)

- Brian encourages everyone to attend all or part of the day. Registration still open and there is room for more attendees. Bring issues to discuss (Voila, OCLC holdings to be discussed). Attendees from last year felt the day was valuable with its focus on the practical aspects of cataloguing work.

11. **NEOS Miniconference Session - Ebooks - The Questions & The Answers:** Presented by Michael Betmanis and Amanda Nagyl (Friday June 8, 3:15-4pm) Any FAQs from NEOS? (Ian Bigelow, University of Alberta)

- Michael and Amanda are wondering if there are any questions that they could address in their miniconference presentation. Paulette Pelland (Covenant Health) stated that many Covenant patrons find the University of Alberta e-resources in the i-Link catalogue confusing. Patrons wonder why they can't access these items if they are appearing in the catalogue. Karina Dunn (Vanguard) suggested that Blacklight may address some of these issues.
- Fairfax Culpepper, Michael Betmanis and Amanda Nagyl are NEOS Ebook team. Their goal is one MARC record per item. This is very complicated and interesting work, considering the number of vendors involved with Ebook collection.

12. **Welcoming new staff in Bibliographic Services:** (Ian Bigelow, University of Alberta)

   a. Scott Davies - Assistant Supervisor, Processing – management position

   b. Fairfax Culpepper - Cataloguing Specialist, Monographs

   c. Jordan Serben - Cataloguing Specialist, Serials

   d. Fang (Felicia) Liu - Cataloging Specialist, Serials

   e. Danoosh Davoodi - Metadata Specialist – full-time role.

13. **Documentation:**
    a. **For discussion:** The Standards Subcommittee had talked about further useful documentation and\or guides that could be created. The Standards Subcommittee was dissolved at the last Technical Services Committee meeting. Is there a desire for further documentation to be created and if so how should we go about accomplishing this?

Suggestions arising from discussion:
- Ebooks Document of Common Practice:
    o Ian Bigelow (University of Alberta) suggested a document of common practice for Ebooks and asked for a volunteer from the NEOS Technical Services Committee to assist with the creation of this document
    o Lisa Drysdale (Alberta Government Library) volunteered to contribute to this document.
- Updated Serials Document:
    o Red Deer College pointed out that the Summary Holdings Document for Serials is from 2011 and needs to be updated. A new serials document should originate from the U of A Serials Team but should also have a contribution from a representative of the NEOS Technical Services Committee.
    o Lisa Drysdale (Alberta Government Library) volunteered for this role as well.
    o Laura Somerville (Lakeland) said that as a new NEOS member she found dealing with serials to be difficult.
    o Ian advised that 2 of 4 members of U of A Serials Team are new and will need time to become familiar with their positions. This may affect the timeline for a new serials document.
    o Brian Stearns (University of Alberta) is willing to help with a new serials document. First step is to compile what would be needed in a new document.

    ACTION: University of Alberta Serials Team to review existing Serials document and someone from the Serials Team will be invited to the next NEOS Technical Services Committee meeting for further discussion (Ian and Susan).

- Wish List for Cataloguing Documents:
    o Susan suggested committee members think about a "wish list" for documents needed for cataloguing. Brian Stearns brings a depth of knowledge and experience that would make a strong contribution to this ongoing effort.

    ACTION: Finalize an approach for creating new NEOS Cataloguing Documents at next Technical Services Committee meeting.

(13. Documentation -continued)

    b. **For information:** Website updates (https://www.neoslibraries.ca/neos-groups/technical-services/documents/) (Susan Jones, MacEwan University):

- **Last Copy Procedure - 2018** – updated (contact email address changed)
- **NEOS Transfer Procedures – 2018** – Newly updated document added to the website
- **NEOS Cataloguing Standards -2018** – This updated Document 1 replaces the 2010 version on the website
- **Summary Holdings Statements for Serials – 2011** – This version replaces the 2003 version on the website, but likely needs a further review and update (thanks to Red Deer College for the alert to this)
- **Cataloguing Standards Document 6** – Dead link, with unknown content. Dead link removed, after consultation with the Authorities Librarian, Brian Stearn
- **Authority Control in the NEOS Environment – 2010** – Dead link, with unknown content, removed, after consultation with the Authorities Librarian, Brian Stearn. Brian has suggested that the committee's Document 1 gives enough detail about authority work for the general needs of the NEOS membership.

14. **Indigenization and Subject Headings in the NEOS Catalogue – Current Practices?**

   For discussion (Vanessa Bangay, Susan Jones, MacEwan University):

    a. An opportunity for the committee to discuss what it wants its position to be on indigenization activity in the catalogue.

    b. Some NEOS libraries have made local decisions to stop using some LCSHs, such as "Indians of North America" or the CSH "Native peoples" and using "Indigenous peoples" instead, or adding it to records. Frameworks can be found for adding such and other headings, the work of MAIN (Manitoba Archival Information Network) and the work of UBC's Xwi7xwa Library being a couple of such frameworks.

    c. University of Manitoba MAIN– LCSH Working Group has implemented a strategy to replace culturally insensitive LCSH terms in MAIN and has made a spreadsheet available that includes background, guidelines followed and subject by subject additions, deletions and changes/substitutions, revised to 2017. For example: Indian business enterprises is changed to Indigenous business enterprises.

    d. University of British Columbia's Xwi7xwa Library First Nations House of Learning (Library of Congress source code "fnhl") subject thesaurus headings –

no public list of the headings yet available but discoverable on a title by title basis in their catalogue. For example: 650_7 Indigenous knowledge organization.|2fnhl

Meeting discussion:

- Susan Jones (MacEwan) – Lots of work is being done around indigenization, but not necessarily in the NEOS catalogue. Some "rogue" cataloguers are adding new subject headings to catalogue. Perhaps the Technical Services Committee should speak to this. Do we want to form a subcommittee? Should our contribution be a statement or more practical in nature? Shall we do an environmental scan in our own catalogues to bring forward to committee?
- Vanessa Bangay (MacEwan) – Interim guidance is needed. It is currently like the "wild west" when doing indigenous-related cataloguing.
- Ian Bigelow – The work of the University of Alberta Decolonization project has not yet been brought into the NEOS catalogue. The U of A wants to be sure subject headings are changed correctly. Input from relevant community members needs to be gathered. There are also technical challenges for searching old vs. new records. Should old subject headings (e.g. Indians of North America) be removed completely or should they just be supplemented with additional headings? The answers are not easy and we should not change things without a strategy.
- Susan Jones (MacEwan) – Perhaps moving forward depends first on other actions such as the creation of new subject headings, and a NEOS statement, emanating from this Committee, could articulate this. Functionality for authority records management in Symphony is limited and limiting.

ACTION: Invite Decolonization Project staff to next meeting to discuss how NEOS Technical Services Committee could proceed (Susan).

15. **University of Alberta Decolonizing Description Project Update – For Information**
    (written update provided by Sharon Farnel, Metadata Coordinator, University of Alberta)
    a. setting groundwork for campus community consultations and conversations with FNIC partners
    b. working on pilot projects (Peel's Prairie Provinces, ATEP print collection, Idle no More web archive)

16. **Deslibris:** Thus far we have not been loading Deslibris titles to the NEOS catalogue because the records have quality issues and subject access is problematic. Added to the agenda to brainstorm approach (Ian Bigelow, University of Alberta)

    - Ian Bigelow – Deslibris is a large ebook and documents collection that some NEOS libraries subscribe to. There are record quality issues (e.g. punctuation) with the vendor supplied MARC records and they are no longer being imported into the catalogue. Should we pay to have these records updated through a different vendor? Should we amend NEOS Technical Services Document 1? Is something in the catalogue better than nothing? In the long run, we do not want to create more problems in the catalogue.
    - Susan Jones – Deslibris's strength is Canadian content. Access is important; should standards be "bent" so that these records can be included? MacEwan is mulling over cancelling their Deslibris collection since they are not in the catalogue. Should eBooks committee talk about how to deal with collections that are not up to minimum standards? Search results need to have clarity.

    ACTION: Potential topic for NEOS mini conference eBook session (Ian).

17. **MIL migration:** UAL would like to test NEOS level transitioning of a collection (MIL) by having Proquest direct updated MARC for all MIL materials shifting to EBC come to us directly and at the same time as others in the consortium. (Ian Bigelow, University of Alberta)

    - Ian Bigelow – Ebook team is looking for approaches for dealing with projects such as this.
    - Susan Jones – Proquest has stopped supporting MIL library. New product is Ebook Central. Catalogue records need to be updated so that they will go directly to the new product platform, eBook Central. Currently the old records are redirecting to the new product but this redirect will cease at some point. Is Proquest going to charge for customized records? This is a considerable cost. It has been challenging to work with vendor.
    - Laura Somerville (Lakeland) inquired if Proquest has said that they will supply these new records, and at what cost.
    - Ian Bigelow – Consideration can be given to future opportunities, which are more straight forward and less messy as this MIL one, to take a more centralized approach to MARC loading,

18. **OCLC Holdings:** (Agenda Item #18 moved up to Agenda Item #9.5)

19. **Data cleanup:** (Ian Bigelow, University of Alberta)
    a. 949 - Does anyone use 949 field in Bib records? ITS is discussing removing these across the collection to save space
       - 949 tag is used by eBook team for holding information to load into database. This line is static and does not change. U of A would like to delete this line. Does anyone use this line? Vanessa Bangay stated that MacEwan uses it occasionally to troubleshoot records. It gives a historical context to where the record originated. Consensus was that it is okay to remove this field.

    b. 599 - These auto-populate, but many need cleaning up following transfers and changes across libraries.
       - Ian Bigelow - Should we let ITS delete them all and let them re-populate? Consensus is to let things be updated, and to continue this on a regular basis. Ian suggests running a test batch first.
       - Susan Jones – There is a concern about cancelling subscriptions that still have holdings. It would be good to confirm the functionality in Sirsi test.

(ITEMS 20 to 22 ADJOURNED TO NEXT MEETING.)

20. *RDA 3R update – For information: On June 13th a beta version of RDA along with a new Toolkit interface will arrive. NEOS-TECH should begin planning for these changes (Ian Bigelow, University of Alberta)*

21. *URI in MARC – For information: (Ian Bigelow, University of Alberta)*
    a. *Could work on a workflow via OCLC Search API, MARCEdit, or in tandem with and authority project with an alternate vendor (BSLW, MARCive)*
    b. *NEOS collection returned from Casalini SHARE VDE project in MARC enriched with URI … How can we use it?*

22. *BIBFRAME and Casalini SHARE Virtual Discovery Environment: (Ian Bigelow, University of Alberta)*
    a. *LC, LD4, and PCC: A discussion on ongoing work towards linked data implementation. For context, the slides posted from the LD4 meetings are here.*
    b. *SHARE VDE Phase 3A:*
       - *In production by the end of December 2018; to proceed, approval needed from the participants by end of June 2018.*

- - *Phase 3A includes the first three Use Cases from the list compiled in October 2017:*
    1. **UC1** *- Implementation of the platform with the entire catalogues*
    2. **UC2** *- Automated regular updating of data from libraries*
    3. **UC3** *- In the opposite direction, dissemination procedure of data to libraries*
  c. *SHARE VDE PHASE 3B: The scope of this subsequent phase is to achieve the added benefits and value of linked data in a working environment implementing the further Use Cases such as copy cataloguing, original cataloguing etc.*
  d. *Relationship to NEOS standards*
     - *[BSR](#)*
     - *[CSR](#)*

23. <u>Minute Taker at Next Meeting</u>: Grande Prairie Regional College