

2019-02-26 NEOS TECHNICAL SERVICES COMMITTEE MEETING MINUTES

Date: Tuesday, February 26, 2019

Time: 1:30-3:30 pm

Location: MacEwan University, City Centre Campus, Room 7-273p

Minute Taker: Karina Dunn, Vanguard College

Chair: Susan Jones, MacEwan University

Regrets: Tara Gunsch, Red Deer College

Guests: Brian Stearns, University of Alberta

Vanessa Bangay, MacEwan University

[Committee Terms of Reference](#)

Present: Susan Jones (MacEwan) Chair, Lisa Drysale (Alberta Government Library), Mary-Lou Veeken (Alberta Government Library), Gisele Ramgoolam (Norquest), Ian Bigelow (University of Alberta), Karina Dunn (Vanguard), Jolene Linfitt (King's University), Darel Bennedbaek (Burman University), Anne Carr-Wiggin (NEOS).

Teleconferences: Audrey Lyons (Alberta Innovates), Nicole O'Connor (Grande Prairie Regional College), Eden Murray Black (Grande Prairie Regional College), Laura Somerville (Lakeland), Michael Baird (Olds), Linda White (Keyano), Myrna Dean (Concordia), Maria Haubrich (Red Deer College), Tara Sommerfeld (Covenant Health), Shiloa Thomas (Northern Lakes)

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

MINUTES

1. Call to Order \ Welcome

2. Attendance Roll Call

3. Review and Additions to the Agenda

None.

4. Approval of the minutes of the October 30, 2018 meeting

We thank Nicole O'Connor for preparing these minutes

Edit: pg.4 6b - Norquest wants UofA to "upload vendor records" instead of "to do cataloguing"

5. Outstanding business from the October 30, 2018 meeting

- a. Draft a statement to submit to Library and Archives Canada on behalf of NEOS Technical Services Committee. Bring the draft to committee for discussion - **Ian Bigelow (University of Alberta Libraries), Darel Bennedbaek (Burman University), Myrna Dean (Concordia University)**

- i. scheduled a meeting of the group

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- ii. info gathering yields - no indication that LAC approach has changed, interesting discussion with OCLC - so it is still really important to move ahead
- iii. AMICUS transfer data was not current at the time (2010-2016) - to update them (in Voila) we need to be member of OCLC : UofA stopped updating it for 6 years until this transfer happened with old data - recommendation to do some testing to see the behaviours of Voila and compare with expected behaviours - perhaps it can be investigated to see the rationale behind the decision. Brian Stearns explains that AMICUS could not deal with Unicode so we stopped submitting our records. And so, old data was transferred but it is a static record and doesn't link.
 1. **ACTION - IAN**: System Administrator follow up with individual Library (Alberta Innovates) - meet offline to provide support and clarification.
- iv. Our main NEOS concern is that an OCLC membership is required to have our holdings in the National Union Catalogue. Therefore, we write a letter!
 1. If you chose to become a member, they would load your current holdings and update all the records

- b. Create a committee cataloguing document of common practice for ebooks – **Ian Bigelow (University of Alberta Libraries), Lisa Drysdale (Alberta Government Library)**

See DRAFT: NEOS: Guidelines for E-Resource Cataloguing

The monographs team is happy with it.

Minor Edits:

- pg2 - bottom 3rd - move 856 |x - move it up to in the proper order
- the spelling of "colour" - let's use canadian spelling
- pg3 - near the top 856 40|3 fix the spacing

Should probably include a preamble about the goal of combined records rather than individual ones.

This is going to be a living document - could we post it to the NEOS site with a link to google doc for ease of editing/updating. Example - our current change of going from 856|3 to 856|y

"OCLC is the preferred database" - because a majority of it is done at UofA (?) - perhaps we can just remove it or change the adjective? Perhaps list a few and indicate which need authentication. OR add an explanation of the reason: "to avoid duplicate records" **ACTION - IAN**

Title Control Number: Automatically 001 field from an imported record might be updated overnight - Ian will confirm this behaviour for cataloguers **ACTION - IAN**

Not quite ready for adoption - revise and return

Creating a google document for feedback for the eResources document **ACTION - IAN**

- c. Update the committee's serials document – **University of Alberta Serials Team, Brian Stearns (University of Alberta Libraries), Lisa Drysdale (Alberta Government Library)**

MARC Summary Holding Document (2011) merge it with a serials document

Needs some more direction on what we actually need in it **ACTION - ALL**

- prediction patterns are not intuitive.
- consider non-serials control serials libraries as well (outline different processes)

Maria Haubrich (RDC) would be happy to help with this document.

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Meet & Discuss when possible **ACTION - IAN**

List of who (which libraries/people) is regularly dealing with serials to consult: Laura Sommerville
Shared Google doc where people can drop their feedback **ACTION - IAN** (email list when ready)

- d. Finalize an approach for creating new NEOS Cataloguing Documents – **ALL**

We've got a bit of momentum this last year, perhaps we should just keep it as a standing agenda item so we can regularly check-in and update our various documents.

- e. Review\update the Terms of Reference for the committee – **ALL**

https://www.neoslibraries.ca/wordpress/wp-content/uploads/2016/04/Technical_Services_2009.pdf

> 4. provide training for staff of "new" member libraries, is this done in practice? limited to conference? But we should also be providing for "new" staff of member libraries, right?

Is there enough training support for NEOS? - there's a need.

specify on workflows and neos standards, not general cataloging
"buddy library" and excellent documents might be enough

ie. Staff are usually trained by their library, when this isn't possible, the committee provides training on NEOS standards and expectations.

It's clear with new libraries, but not so much with new staff and turnover in small libraries.

This committee is responsible for organizing the training of the new member library or providing their buddy library, when a member library hires new staff, they are responsible for the training unless this isn't possible. Available on request? **ACTION – Mary-Lou & Anne to draft new clause**

> Let's add the catalogathon to the terms of reference as another point?

ACTION ALL - review for any feedback/concerns to bring to next meeting

6. NEOS MiniConference (June 7, 2019): General Planning – **ALL**

- a. Key session requests
- b. Preconference
- c. Scheduling: concurrent vs come-and-go vs separate scheduling

Brian is running the catalogathon again (yay!) - always looking for ways to make it more useful for people. It is difficult to run it on the same day as other things happening.

BIBFRAME and/or Sinopia demo or workshop? (Ian) but NOT concurrent ;)

ACTION ALL - Send your ideas to the List-Serv or the Continuing Education Committee.

7. OCLC Data Sync - Ian Bigelow (University of Alberta Libraries)

- a. Tracking errors

Any issues? Concordia still having loading issues with data sync somewhat sporadic, one day worth of cataloguing (indexing issues in early January) and discards list (donated to RCRF - the add report for them was processed out of order - November's list). Burman also having random issues (couple weeks ago a few books didn't sync). UofA also seeing interesting behaviour - duplicate master records.

OCLC thinks it is running smoothly as of end of Jan?

It seems to be good for a while and then randomly won't work, so have to keep checking on them.

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ACTION: IAN follow up with Myrna and Darren regarding specific issues to inform his conversation with OCLC regarding reclamation. Set up a follow up with OCLC (Carrie Anderson?) to track these things and find a cause. Data Sync needs to be working properly before we run a reclamation project. (aside fyi "Batch Load" renamed Data Sync a few years ago) of upmost importance for those libraries that use WorldCat as their discovery layer.

b. Local url in OCLC

In discussion - stripping all url from sirsi is not a good option because it might remove ones we want to keep (like gov't documents)

8. OCLC Update Service - Ian Bigelow (University of Alberta Libraries)

Mainly impact OCLC members but also those who have shared records/holdings.

Predefine which fields and formats on the OCLC master bib records you want to pay attention to, so as those get updated you can receive them and improve your records - feed through the authority records to update those as well. Would localised information get overwritten - how to protect certain fields has to be considered. Still under early days of analysis but would potentially be a high impact project.

9. OCLC Reclamation – Ian Bigelow (University of Alberta Libraries)

a. Timeline

b. Database Cleanup. See: Database Cleanup Pre-Reclamation worksheet

A number of projects need to be done prior to a reclamation project (potentially in the next calendar year 2020). So the database needs to be cleaned up in advance. Hopefully gives data sync enough time to stabilize as well.

MacEwan takes this opportunity to review the rules for loading and ensures the rules make sense and are doing the right thing so continued new holdings are loaded cleanly.

Perhaps Jim Hamilton could do a presentation at NEOS Mini conference? **ACTION - IAN**

Item cat 2 question - some eResources (perhaps Gale) because of licensing for certain packages cannot share the cataloguing

Some items don't have an OCLC number in 035 (Myrna)

NEOS free exclusive items are not getting 035 (Lisa)

EBSCO discovery doesn't include NEOS free in a limited search - follow up with EBSCO customer service rep it is deep in the admin site, how they get the locations (Eden)

Work with OCLC on NEOS free ?

Worldshare might be an issue ?

NEOS free holdings get added to MacEwans holdings (not a separate library for them) - they aren't curated, and some government documents do need to be in our catalogue perhaps but not all open library resources? Sometimes the curated collection does include free items, but we don't need to have everything, right?

A notification would be great! A report subscription through Blue Cloud Analytics could be set up.

Usage statistics on NEOS Free items are unlikely - it would be clicks on links.

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Clarification on NEOS free library moved discussion to number 15 in the Agenda :)

10. MacEwan University – Indigenization Initiative – Vanessa Bangay (MacEwan University)

MacEwan seeks guidance from the NEOS Technical Services Committee on the following indigenization initiatives, specifically asking, in the following which would be the preferred form:

- a. MacEwan proposes to start using certain LCSH as “genre” terms to categorize holdings that are not necessarily “about” the term, such as Indigenous filmmakers, or Indigenous authors, for example:

650#0 Indigenous authors

would become

655#0 Indigenous authors

or

655#0 Indigenous authors. |5CaAEGMCT

or

655#7 Indigenous authors. |2local

- b. MacEwan proposes to add “Indigenous content” as a local subject or genre heading to applicable bibliographic records as a means of identifying MacEwan holdings with content of indigenous interest:

650#7 Indigenous content. |2local

or

655#7 Indigenous content. |2local

or

655#0 Indigenous content. |5CaAEGMCT

or

690 Indigenous content. |5CaAEGMCT

-- deferred --

11. Electronic resources update – MARC files for ProQuest Academic Complete and Canadian Ebook - Ian Bigelow (University of Alberta Libraries)

-- deferred --

12. Changes to ISBD punctuation in MARC <http://www.loc.gov/aba/pcc/documents/test-records-punctuation.html> - Ian Bigelow (University of Alberta Libraries)

-- deferred --

13. Approved for use in Alberta Schools – Usage across NEOS - Ian Bigelow (University of Alberta Libraries)

-- deferred --

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14. **Treatment of custom editions across NEOS (University of Alberta uses a field 690 to identify these, should all institutions try to be consistent?) - Ian Bigelow (University of Alberta Libraries)**

-- deferred --

15. **Open Access sets and usage across NEOS (NEOS Free) - Ian Bigelow (University of Alberta Libraries)**

University of Alberta has had a policy not to catalogue free material as a general rule, but some exceptions and initiatives have popped up - examples: Open textbook library, Open textbook initiative.

Is there a trend? It is on the radar but not widely adopted?

Concordia has in their new academic plan

Burman is in discussion

Some concerns: Sometimes the metadata is not wonderful - how to decide what to load. Sustainability of some of these collections. Various update processes

Should we put together some documentation to support these initiatives?

How to move forward with these?

ACTION ALL: Shared google doc to gather feedback from our libraries - TALK to those relevant players in your institution

The process should also be looked at, reviewed, refreshed.

NEOS-Free Access link in the 856 - the sfx ? The items are automatically in the UofA and/or MacEwan access without - is it on the new public catalogue? **ACTION IAN** : take to serials team for analysis

16. **ILS Team: Ian Bigelow (University of Alberta Libraries)**

- a. 090 update/cleanup project
- b. updating of local tags upon discard
- c. Defining IC3 tags
- d. 001/003 (our system automatically updates the 001 to be a local control number but does not change the 003, which means that our local control number is attributed to another database)
- e. NorQuest World Language Collection
- f. Notifications of Sirsi/Sirsi Test updates

-- deferred --

17. **MARC Tags:**

- a. Updating 040 \$d – Is there still value in the current updating process – **Brian Stearns (University of Alberta Libraries)**
- b. Fixed field coding issues. See: Fixed field coding issues examples – **Vanessa Bangay (MacEwan University)**.

-- deferred --

18. **BIBFRAME update - Ian Bigelow (University of Alberta Libraries)**

- a. Initial SVDE data.
- b. SVDE timelines

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- c. LD4P cohort timelines and update
 - i. Sinopia
 - ii. BIBFRAME training

-- deferred --

19. **Minute Taker at Next Meeting:** Red Deer College