Cataloguing & Authorities User Group Meeting Minutes
March 7 2016, 10-11:30 am
Alice Moulton Room, Gerstein Science Information Centre

In attendance: Lisa Andrews-Attwater (Rotman), Juliya Borie (Robarts), Alastair Boyd (Robarts), Ravit David (Scholars Portal), Jordan Hale (Map & Data), Mary Jaques (St. Augustine’s Seminary), Joan Links (Media Commons), Kate MacDonald (Trinity), Anne McGillivray (Knox), Jeff Newman (New), Humayun Rashid (Law), Mary Reynolds (Regis), Fabiano Rocha (Robarts/EAL), Carmen Socknat (Victoria), Lana Soglasnova (Robarts), Dong Xia Wang (UTSC), Lauren Williams (Fisher), Irene Wu (ROM)

Attending remotely: Susan Williams (UTM)

Regrets: Michael Bramah (St. Mike’s), P.J. Carefoote (Fisher), P.J. MacDougall (Massey), Elisa Sze (Inforum)

1. Agenda for today’s meeting
   Approved.

2. Minutes from November 2015 meeting
   Approved.

3. Terms of reference update

   As it hadn’t been updated in over a decade, the document was reviewed to update membership definitions and terminology reflective of the present cataloguing landscape.

   Lana asked if increased representation from ITS would be helpful so the development team would better understand the implications of cataloguing and metadata issues. Marlene remarked that she is that liaison to ITS. This role involves identifying and communicating database issues back to ITS and vendors, and communicating database cleanup activities back to CAUG.

   Kate asked: what is the definition of assessor and designated members? No one was sure...Humayun and Alastair provided their guesses. Joan suggested this division was no longer necessary. Alastair noted that because this committee does not vote, we do not need divisions between voting and non-voting members. There was agreement that the membership section should stay, though we’re not fussy about who attends – it will remain as a reminder to library/department heads to send representation to CAUG. Alastair also suggested that there should be some hospital library representation in the committee – the document will be left open for feedback.

   Several points in the Terms of Reference were related and could be consolidated. Kate revised document based on all feedback given in meeting – here it is
4. **Library Services Platform update – Marlene Van Ballegooie**

Mary asked about pricing: Marlene doesn't have it, firms would need to go through RFP process for UTL to obtain quote.

Lana: when does Sirsi contract end? Marlene: We are now on a year-to-year basis (which Alastair likened to a month-to-month apartment lease). Mentioned OCUL’s parallel search for a consortial LSP. Ravit: OCUL has additional complexity, as not all schools will use system in the same way – different combination of modules for services provided. Alastair: all vendors will be coming to present to OCUL committee, so we can sit in on those presentations.

Marlene said we should move as much as possible into selected LSP as per the migration plan that develops – however, digital collections can follow print/ERM database migration.

Alastair pointed out that the to-do list for Endeca provides a good feature list of what we want a discovery layer to do. Ravit: the first to vendors work with discovery layers, what about the others? Marlene: Sirsi has its own, Innovative has Encore/Duet, Sierra pairs with Endeca.

5. **E-resource update – Marlene Van Ballegooie**

There is now a JIRA project for loading e-resources that are available to the entire UofT community. Send requests to emetadata@library.utoronto.ca and refer to Marlene’s .ppt for instructions. Alastair notes this replaces the e-resource update form on the staff intranet.

Lana: will the 039 tag still contain the initials of the responsible party? Alastair says this was a very Robarts-specific practice, but the JIRA workflow will make it clear who the appropriate contacts are for updates.

6. **Endeca to-do list – Marlene Van Ballegooie reading an email from Bilal Khalid**

What’s ITS working on?

- order record display
- known item search
- relevance ranking algorithm
- integrating authority data into catalogue (indexing cross-references)
- incorporating RDA fields
- improvements in mobile display
- retaining place within hitlist
- indicating number of concurrent users for e-resources
- fixing the 100 holdings limit
- fixing incorrect covers
- improvement in journal title searches
- searching within result sets
• fixing typos and faulty e-resource links

7. **RDA and Endeca update – Alastair Boyd**
   This is a high priority fix for ITS – at one point it was fixed, then it became unfixed. Imported RDA records with 264 fields (instead of 260) were not showing publication data. As well, Endeca is not expecting to see repeated 300 fields, so the primary component of a multi-format item is often incorrectly displayed. Until a fix is made, we should manually combine the contents of repeated 300 fields from imported records into a single 300, à la AACR2.

There are a number of records in the system from the pre-Sirsi, pre-LCGFT days that have the form contained in a |x subfields in 6XX fields, so the subject and form of the work can be challenging to differentiate when filtering results by facet – “is it about maps, or is it a map”, for example. Lots of relevant records end up missing when filtering by format. Joan suggests that we should all think through the implications of such a batch conversion for materials at our libraries and make such concerns known on catinfo when the announcement of the conversion takes place.

We should be including relator terms ([PCC training manual](#)) in our name entry fields now – even if they're not displaying now, they will make the migration of these records into a linked data structure much more useful – we should start to consider the web as a potential discovery layer. The more work we do now to prepare our MARC records for conversion to the subject:predicate:object URI structure of linked data, the better. When bringing in RDA records or original cataloguing, please start to use relator terms in |e or relator codes in |4.

Question from Anne: where is the list of terms? Alastair says the PCC handbook [linked above] is much easier to navigate than the RDA toolkit.

Other questions for Alastair:
Carmen: are order records going to display soon? Alastair: hopefully. Precat records are now displaying, get about one request per week.
Joan: will order records display across the board? This will create chaos in Media Commons, as users not seeing that titles are “on order” – Alastair says that if the distinction of “on order”/“received” is lost, we can discuss suppression by format. Joan shadows order records deliberately.
Alastair clarifies that the item type in Endeca is not taken from the item record in the call number tab in Sirsi, it’s taken from the control tab and fixed field/007 coding.

8. **Any further business?**
Kate: is May meeting OK? Would June be better? [Fill out the doodle poll](#).
Our Current Technical Landscape

- A complex environment comprising various products
- Duplicated workflows
- Data integration between systems is time-consuming
- Data analysis across systems is difficult
What are Library Services Platforms?

• New generation of library automation products
• Addresses the changes that libraries have experienced over the course of the last decade (i.e. substantial growth of electronic and digital content).
• Library Services Platforms aim to simplify library operations through a more inclusive platform designed to handle all the different forms of content.

Marshall Breeding
Functional Characteristics

• Management of both print and electronic materials
• Replacement of multiple products
• Multiple metadata formats
• Knowledge bases
• Collection analytics
• Discovery services
Technical Characteristics

• Cloud-based
• Multi-tenant platforms
• Iterative development cycles
• Web-based interfaces
• APIs for extensibility and interoperability
The Competition
Ex Libris (now Proquest) – Alma

• Alma is intended to bring together the main categories of content that libraries manage into a single resource management system.
• Covers all traditional functions: selection, acquisition, materials processing, circulation, reserves, ILL
• Comprehensive e-resource management, extending what the company originally developed for SFX
• Paired with Primo discovery service ( Summon integration is coming... )
OCLC Worldshare

• Product uses all data available in WorldCat.
• Provides a complete set of circulation, acquisitions, serials management, and related capabilities to extend the cataloguing and bibliographic services and resource sharing in place for WorldCat.
• A library manages its local collection by attaching item-specific data to its holdings as represented in WorldCat
• Open APIs for the development of web-based applications
Proquest Intota

• Functionality centers on enhanced electronic resource management and collection analytics and assessment tools that span print and electronic materials
• Currently, libraries using Intota do so in tandem with traditional ILS
• Unlikely to fully develop, given Proquest’s recent acquisition of Ex Libris
SirsiDynix BLUEcloud

- Hybrid product (not a true LSP!)
- Operates in conjunction with its Symphony or Horizon ILS through a layer of web services
- ILS can be SaaS (Software as a Service) or locally hosted
- Three main components:
  - BLUECloud Staff
  - BLUECloud Marketplace
  - BLUECloud Discovery
- Coming soon - BLUEcloud ERM
  - Open source Coral ERM
  - No knowledge base functionality
Innovative - Sierra

- Built upon existing ILS infrastructure
- Can be fully hosted by Innovative or local institutions may retain on local servers
- Use of APIs for interoperability with other systems, i.e. Encore Duet (Encore + Ebsco Discovery Service)
- ERM component, but no central knowledgebase at present time.
- Will likely partner with Ebsco EDS for full ERM capabilities
In the UTL Context

LSP Steering Committee Members

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<th>UTSC</th>
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<td>Patricia LaCivita</td>
<td>Shelley Hawrychuk</td>
<td>Alastair Boyd</td>
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<td>Victoria Owen</td>
<td>Ian Whyte</td>
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...And the Metadata Technologies Manager...
E-Resource Update
Adding Resources to ERM and ILS

• We now have a Jira project to streamline E-Resource loading workflows
• For e-resources available to the entire U of T community
• Send request to:
  – emetadata@library.utoronto.ca
  – Please ensure the resource link works, provide URL and indicate if resource is paid or OA
• E-Resource team will:
  – Determine which system is best able to track resource
  – Source a MARC record for the resource (Serials Solutions MARC service or other suitable copy)
  – Attach contact to the resource
  – Load resource into ILS/Endeca