BCCATS Spring meeting
May 10, 2016
Kwantlen Polytechnic University
<u>MINUTES</u>

Present:

Charles Hogg (BC Legislative Library) charles.hogg@leg.bc.ca

Karen Pickard (BC Legislative Library) Karen.Pickard@leg.bc.ca

Hardeep Nikolaev (SD36 Surrey) nikolaev_h@surreyschools.ca

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Kathy Dutchak (BCIT) kdutchak@bcit.ca

Deborah Hazell (UNBC) Deborah.hazell@unbc.ca

Karen Schendlinger (SD41 Burnaby) karen.schendlinger@sd41.bc.ca

Ryan Vernon (Langara College) rvernon@langara.ca

Samuel Richmond (VPL) samuel.richmond@vpl.ca

Cleire Lauron (KPU) clare.lauron@kpu.ca

Cynthia Ng (BC Libraries Cooperative NNELS) Cynthia.ng@bc.libraries.coop

Richard Violette (GVPL & SLC) rich@slc.bc.ca

Sue Andrews (UBC) susan.andrews@ubc.ca

Frances Dodd (SFU) fdodd@sfu.ca

Linda Woodcock (KPU) linda.woodcock@kpu.ca

Karen Nelson (Capilano U) knelson@capilanou.ca

Marion Davidson (Camosun) Davidson@camosun.bc.ca

Penny Swanson (SFU) pswanson@sfu.ca

Helen Lightfoot (VPL) helen.lightfoot@vpl.ca

Heather Bourne (Quest U)

Eileen McMillan (Surrey PL)

Lynn Brockington (WVML) lbrockington@westvanlibrary.ca

Teleconferees:

1. Approval of the agenda
Approved with no amendments

2. OCLC listening tour and information session

Daniel Boivin and Nigel Long (present) with John Chapman (online)

Q1: Services for WorldShare Cataloguing services. Invoice/MARC batch file numbering consistency (orders coming from Ebsco/2nd or 3rd party vendors with MARC records coming from WorldShare). John Chapman thinks it may be an Ebsco invoicing issue. More info required - OCLC may not be able to control it. It may also be a Coutts problem - different information is coming from different sources. Embedded invoicing may also be an option (or is, with certain vendors). Problem is under investigation by OCLC.

Q2: Surrey Libraries: Costing model for reference search. Will it change due to the prevalence of natural language searching. Could be that the question confuses Discovery product vs. cataloguing module. No plans to change - pricing for Discovery based on FTE or other factor, not number of searches. Question originator not present - question will be deferred for now.

Q3: Transition from FTP to WorldShare. Batch files with embedded invoices from Coutts primary sort order is by invoice number. OCLC re-sorts the file by OCLC number, which makes line items difficult to reconcile. Logged as an enhancement request with OCLC. This is an invoice loading issue.

Q4: Duplicate records not existing in WorldCat - AACR2 & RDA. OCLC policy does exist, but may be enforced only by automated processes. Individual records can be pointed out to OCLC. Hybrid records present a different issue - AACR2 records with RDA coding & vice versa. Hybrids are not discouraged, but recognized as fairly prevalent practice. Records are not fixed intentionally. Is OCLC "hybridizing" AACR2 records? Yes, to an extent. Will the hybrid record be combined with or superseded by an existing RDA record? The hope is no AACR2 records are being added, but they would not be changed without an item in hand. Duplicates could appear due to batch loading.

Q4a: Timelines for GMD removal? No answer for now. Can there be a communication regarding errant GMDs? Penny Swanson can email John Chapman at OCLC for follow-up. On March 25 an email indicated the process would be starting in April, by accession number, likely to take a couple of years. Focusing on English language cataloguing. GMDs will be removed and 33x fields will be added. Process is automated, so all appropriate 33x fields may not be added, but at least one will be (most likely the carrier type).

General Q: Does OCLC have a timetable or timeline for WorldCat's capability to render linked data, both embedding and importing content from other sources. Currently all WorldCat records do contain linked data. OCLC is also working with LC to enhance BibFrame, also schema.org. Other libraries for other kinds of enhancements. Task force is also making recommendations regarding treatment of URIs within MARC records. Eventually OCLC will have libraries not interested in entities relationships, and others that are mainly interested in that, so 2 tracks are being followed. Currently research/development is around Discovery using linked data -- in the future, they need to research/develop how Cataloguing/TS will use it

Concerns re linking vs incorporating data taken from the Internet. OCLC links to sustainable, robust entities on the Internet. Cataloguers can incorporate or link to other types of resources but may need to be checked or vetted for issues of legality or appropriateness. WorldCat data is currently available for free and for various pay options.

Can shareable metadata be scaled to mobile devices? Terry Reese's MARCedit software includes a number of OCLC tools. OCLC wants to make it easier for clients to use OCLC data, whether tools are developed by OCLC or by other partners or users. As far as other devices, OCLC is currently developing different resolutions for display rendering. Responsive web design is part of the new WorldCat Discovery product. It is possible to use some WorldShare Cataloguing features on mobile devices but development will depend on possible workflow applications.

LAC project: management of union catalogue on WorldCat program but also WMS for managing authorities etc. Delay in signing agreement is because of the latter part. Features being requested include tools for editing as well as managing authorities. Union catalogue management is tried and true. A single agreement is the goal -- both parts have to be agreed on. Once an agreement is signed implementation will take 12-18 months. LAC also has to engage the library community regarding holdings or data that may or may not be in OCLC already. LAC users who are not currently OCLC customers will have to subscribe to OCLC to use LAC records from Amicus. Can Amicus records be searched and downloaded via Z39.50 once LAC partnership with OCLC is completed? Negotiations with LAC include discussion regarding keeping access to Amicus records for non-OCLC customers. There is no answer right now. LAC will tour around to explain the new arrangement with OCLC and how it will affect Amicus users.

Timeline for end date for Connexion client - transition to metadata editor. No timeline right now but analysis regarding cost and other factors is underway, probably available in the fall. WorldShare metadata has over 2000 users, split between the Record manager product (300) and Collection manager (the rest). Record manager is not widely available yet, but will be before Connexion is retired. Record manager access can be requested by Cataloguing subscription customers.

Thanks to our OCLC guests.

BREAK

3. Amendments to the minutes of Sept. 18, 2015 (Fall) meeting
A few revisions were done and will be circulated along with these minutes. Any further issues can be resolved via email.

4. Business arising from the minutes
None.

5. Round table reports
Round of introductions with highlights from Round Table reports.
- Surrey Schools: Destiny ILS version 12 presented some problems but upgrade to 13.5 will occur over the summer. SD36 finds "Maker kits" very popular.
- Penny Swanson will be retiring so probably will not be attending further BCCATS meetings.
- Marion Davidson (Camosun): weeding of electronic materials -- if anyone has documented policies or procedures for this process, they would be greatly appreciated.
- Karen Nelson is leaving CapU but may reappear at BCCATS having found a Cataloguing position in Victoria.
- Sue Andrews (UBC): 3 techs have retired in the last year, 2 have been hired to replace them. Chinese rare books project = collaboration with UW, resulted in 1000 original records in OCLC. New staffing model for RBSC. Cataloguing staff participating in metadata for DOI and other databases. New head of TS from UCSD. University Librarian finishing her term so Deputy University Librarian will be promoted during the search for a new UL. AUL being shared with SFU.
- Linda Woodcock (Kwantlen): Also a lot of admin and staffing changes.
- Richard Violette (GVPL): former head Audrey Driscoll has retired. 16000 items processed for new branch libraries. Skill builders adaptive toys kits have been very successful. SLC - Mac Elrod is ill but hanging in there, for now.
- Samuel Richmond (VPL): new project has united cataloguing and cataloguing support units - new Strathcona branch (with complete opening day collection).

6. New business
6.1 Report from the Chair
BCCATS Awards Committee: Nominations were solicited for TS award. Award was unanimously awarded to Penny Swanson for a long and distinguished career as well as a great deal of mentorship. Award will be presented at the BCLA AGM.

6.2 Continuing Education report
MARCedit workshop in October at Langara. Terry Reese came to Vancouver for 1 day to lead the workshop, which had 30 attendees. People found the content helpful but were disappointed that the workshop was not hands-on and didn't provide an opportunity to interact with the tools. Terry just had too much to present, and the time and structure didn't leave time for interactivity. Possibly an introductory level MARCedit workshop would be good to have in the future. No information is available regarding the cost-effectiveness of the workshop, i.e. whether it made money (BCLA manages that aspect).
Cataloguing Non-Print Materials in RDA workshop will be held May 11, as an update to a workshop held in Victoria at CLA a couple of years ago. Richard Violette was the main organizer. Will have 37 participants. Took a lot of work to organize. BCLA's PDI model encourages half-day workshops, so if BCCATS wants to organize things like this, it might be easier to organize it independently from BCLA, since this topic lends itself to a full-day workshop. But, the amount of work might be prohibitive. Politically it makes sense to stay with BCLA. BCLA will support groups with workshops, but they don't have

to be done in conjunction with the conference.
Future workshops: Code Club: could a similar workshop be run but in a more hands-on format, e.g. in a computer lab. This kind of idea can be explored and maybe expanded into a workshop.
Zepheira/Linked Data - possibly something similar to a workshop run at OLA recently.

6.3 Canadian Committee on Cataloguing activities summary (Sue Andrews, UBC)
CCC meets annually in Sept to review proposals from constituents for changes to RDA and make Canadian response, to be reviewed at the JSC in November. Canadian changes approved: clarification to wording (as opposed to rules) including transcription of punctuation or symbols (can be altered to support clarity for users); what fuller form of name means; multiple language transcription. Rule revisions with impact include music proposals as well as eliminating "Laws, etc." in 240 field. Sources of information for statement of responsibility has had nice wording changes. Revision to instructions for devised titles. Multiple page proposal on new relationship designators resulted in a moratorium on new RDs while some organizational issues are worked out.
Other issues include new model for governance for RDA. Committee principals are now RDA Board, JSC is now RDA steering committee. Organizational structure includes representation from global interests, so Canadian member will represent as North American member. NARDAC (North American Research Development and Access Committee) will be formed to support the North American member of the RDA steering committee.
FRBR library reference model was presented. New model incorporated into RDA and new rules. Tries to take entities from FRBR standards and make high-level model incorporating all the different aspects. [URL link to full document included in addenda to these notes]. WEMI remains, other entities have been modified. These elements will be important for linked data. Most contentious element of this section is the assertion that an Agent has to be a real person and not a fictional character.

6.4 Proposal to expand the scope of BCCATS beyond Cataloguing to other TS operations
Helen Lightman from VPL is new to TS and found BCCATS after browsing BCLA for a place to connect with other TS folks, not necessarily cataloguing people. Also looking to gain insight into structures and models. Penny Swanson responds with history: though BCCATS does include TS, TS people have never gotten too involved with the group, and smaller libraries may not isolate the duties. Often Acquisitions and Cataloguing are integrated or cross-trained. BCLA used to have a separate TS group but their current status is unknown. Acquisitions is not the focus of the current BCCATS core group, but Acquisitions people are welcome to join, and to contact Helen Lightman directly.

6.5 BCCATS possible responses to the TRC
Shelved due to time constraints.

7. Next meeting
Fall meeting probably the week of Sept 19, possibly Thursday, Sept 22. Members will inquire regarding facility availability.

Meeting adjourned 4:05pm.