NASIG Newsletter

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Conference Reports

Pre-Conference Workshop

Introduction to Serials Cataloging with RDA

Steve Shadle

Reported by Dawn Rapoza

In this pre-conference workshop, Shadle led participants through the Serials Cataloging Cooperative Training Program (SCCTP) curriculum for cataloging serials with the Resource Description and Access (RDA) standard. In-depth discussions focused on applying CONSER-required core functions and elements for cataloging serials in a MARC environment, including identifying the mode of issuance and preferred source of information, determining the frequency of publication, constructing authorized access points, transcribing versus recording data, linking relationships and applying the principles of Functional Requirements for Bibliographic Records (FRBR) to descriptive cataloging. Key sections of the RDA Toolkit and Program for Cooperative Cataloging (PCC) policies applicable to serials cataloging were also referenced and discussed.

The elements of a serials MARC record were examined in detail, as well as identifying and managing the differences between major and minor title changes. Practical hands-on exercises enabled participants to apply and discuss the principles presented for descriptive cataloging, cataloging with copy, and bibliographic maintenance.

Conference Sessions

An Ongoing Treasure Hunt: One Library's Practical Experiences Documenting Post-Cancellation Perpetual Access

Nancy Donahoo and Arthur Aguilera

Reported by Shannon Keller

Nancy Donahoo, Serials Manager, Albertsons Library, Boise State University, and Arthur Aguilera, MLIS student, University of Washington, and administrative assistant, Albertsons Library, Boise State University, detail their experience tracking and exercising their post-cancellation access (PCA) rights to electronic journals at Boise State University. Donahoo gave background details for the reason behind their need to track and enable PCA rights. She explained that her library has had to cancel large big deal packages in favor of selected title subscriptions. These cancellations caused the library to have to update its holdings and access information to reflect updated PCA terms. Donahoo then described how Integrated-Library-System (ILS) migrations, consortial purchasing, and the lack of titles listed in packages deals created difficulty in confirming PCA rights on a title-by-title basis. Managing these variables and investigating PCA necessitated the creation of a new workflow and documentation best practices at their library. Aguilera detailed the three-phase process he used to confirm and exercise PCA rights:

1. Verify online access by comparing scope notes from the vendor with actual online access and using Excel spreadsheets to collect and organize information.
2. Update records in both the ILS and OCLC with the decision to include a local PCA note in the e-journal catalog record 999 field. This decision made their catalog record the version of record for recordkeeping purposes.
3. Further researching titles in licenses, former contacts, old order records, and former consortial agreements to find out how far back PCA really is included for a certain title.

Both Donahoo and Aguilera bemoaned that this work is manual and requires significant staff time. They recommended the following: create a PCA rights policy and workflow, work closely with vendors to create greater collaboration in documenting PCA rights, and fine tune record keeping for documenting PCA rights so that libraries may be better suited to exercise them when needed.

Applying Statistical Methods to the Library Data Analysis

Yongming Wang and Jia Mi

Reported by Matt Jabaily

Yongming Wang and Jia Mi, both from the College of New Jersey, presented on the application of statistical methods to library usage data. To encourage other librarians to apply similar methods, they walked participants through two example projects, showing how they had gathered the data, performed the analyses, and interpreted the results. They performed their analyses with R, a free open-source software environment for statistical computing, and RStudio, a free open-source development environment for R.

For their first project, they applied a simple linear regression model to analyze their monthly full-text downloads from EBSCO's Academic Search Premier, their most popular database. Simple linear regressions are used to model linear relationships between a dependent variable and an independent variable. In this case, they used R to perform a time series analysis, plotting changes in the number of monthly downloads over the past eight years. The results showed a consistent downward trend in full-text downloads. As part of the demonstration, they showed the commands used in R to perform the analysis. They also explained how R could be used to measure the extent and statistical significance of the decline in downloads.

For the second project, they used the Pearson correlation coefficient, which measures the degree of relationship between two continuous variables. In this case, they measured the relationship between the number of full-text downloads for journal titles at their institution and the impact factors of those journals. The presenters showed how they created a scatterplot of the data and performed the correlation test, reminding the audience that correlation did not imply causation. The results indicated a significant, positive relationship between downloads and impact factors, but there was some question as to the strength of the relationship.

In closing, Wang and Mi discussed the benefits of discovering the relationships between variables in better understanding trends in library data. In the future, they hope to collect more data and use more advanced models. In response to questions from the audience, they noted that they hoped to share their data with others in their library to help in decision making.

Bringing Social Justice Behind the Scenes: Transforming the Work of Technical Services

Heidy Berthoud and Rachel Finn

Reported by Amy Carlson

Libraries are not neutral. What we do and how we do it is based on choices and recognized or unrecognized bias. This presentation explored and encouraged us to acknowledge those choices and to take honest and thoughtful views of our work and librarianship. Heidy Berthoud and Rachel Finn, both of Vassar College, presented their approach to incorporate social justice into technical services and collection development at their library.

In fall 2017, Berthoud created the Diversity, Inclusion, and Social Justice (DISJ) Working Group. Co-chaired by Finn and Berthoud, the group is charged with reporting existing efforts and new opportunities to manifest the values of diversity, inclusion, and social justice within the library. Influenced by the Diversity, Inclusion, and Social Justice Task Force at the Massachusetts Institute of Technology and primed to think about social justice in all aspects by the Engaged Pluralism Initiative at Vassar, a Mellon-funded campus-wide program, the DISJ Working Group works toward engaged pluralism. They propose changes in three areas: updating the library's mission statement, conducting an internal climate assessment, and creating inclusive spaces.

Berthoud outlined the ways in which she infuses social justice into her work. By their nature, zines contain narratives and visuals which counter normative materials and require new processes. Berthoud balances this patron-centric work with the traditional efficiencies in a technical services department. Ethical acquisitions, or purchasing directly from the content creator or from an independent source, is one way. They have a plan in place for the fall to purchase more content from local and independent vendors. She suggested being open about costs and cuts with faculty.

Web-scale discovery is another area to make an impact. Here, Berthoud experimented with her zine collection to counteract the problems with Library of Congress Subject Headings. Students should be made aware that we organize and describe resources that privilege certain groups—male, white, heterosexual, cisgender, able-bodied, Western, and Christian—at the cost of others. Familiar words and phrases are absent from this official classification system. Berthoud overcomes these obstacles and improves discoverability utilizing these methods: using vernacular keyword-based summaries; using alternate thesauri and/or term choices that will enhance access; creating local headings when needed; and including content and/or trigger warnings. She is collecting data from students to expand this work to include the main collection.

Finn concentrated on collection development theory and decolonizing our collections. Librarians wield great powers: to name, to organize, to provide access to knowledge. In academic libraries, we have the power to influence and shape students and future scholarship. Due to this, Finn delved into collection development theory and found greater scholarship on practice. She encouraged a thoughtful approach to how we collect, what we bring in for our students, and what we provide access to. While Berthoud concentrated on practice in her part of the talk, Finn addressed the collection development theory aspect underlying the practice.

Can we determine collection development theory to decolonize collection development practice? Decolonizing practice refers to laying bare the dominant structures we encounter in librarianship. Guiding principles could shape our processes throughout the library: collection development, technical services, acquisitions, and cataloging. But enlightened, progressive, and radical thought may be more appealing to us than the actual work involved. Painful realizations about who and what we are may result from that process of "walking the talk." Professionally, it requires us to examine our roles in maintaining the status quo, which shore up the hegemonic structures that libraries and archives reinforce through traditional practice.

Understanding the truth about libraries is the first step. We must recognize that libraries aren't for everyone and are not neutral entities. They are meant to create and maintain an informed citizenry. We work to address these issues in many of our libraries, but fundamentally this is their foundation. The profession is predominantly white and middle-class. Finn pointed out that any discussion of diversity in a homogenized group of people or institution, such as many libraries, results in 'diversity' meaning a deviation from the norm without even realizing it. This, in turn, reinforces dominant structures through compartmentalizing diversity. We must contend with those structures and the idea of diversity as deviating from the norm in order to have conversations about effectively importing social justice into librarianship or decolonizing collection development. This work should be done at both the individual and institutional levels.

Librarians significantly influence and control the selection, organization, preservation, and dissemination of information. We belong to a profession explicitly committed to intellectual freedom and access to information. Aiming a critical lens on institutional aims, missions, and visions will help us to be more inclusive in what we do. Finn noted that this is one of the goals of the DISJ Working Group. Part of this process entails unlearning what we've learned, will cause upheaval, and may not have a specific end—this is what constitutes decolonization of our minds. Finn gave an example of her concentric collection development approach, which embodies some of these theories into practice. By holistically approaching the collection areas and drawing from multiple disciplines, she widens the perspective.

An audience member asked if the removal of monuments is symbolically related. Finn suggested that those processes certainly could begin conversations. Another audience member asked whether more money or more time is needed with the zine collection, and Berthoud responded that she needed more staff.

Collection Management, Assessment, and Development: Reviving Collections During LMS Implementation

Erin Ridgeway

Reported by Chris Stotelmyer

Erin Ridgeway is the Electronic Resources and Periodicals Librarian at Southwestern Oklahoma State University (SWOSU) Library. Ridgeway left her position in public services to tackle the implementation of OCLC's WorldShare product after the librarian previously in the position retired. Ridgeway, two staff members, and three students managed the implementation from January to August 2017. The migration process uncovered several issues with journal and microform catalog records. These issues, combined with several external pressures, necessitated a daunting collections assessment project in the middle of the WorldShare implementation.

SWOSU Library has used the Voyager ILS from Ex Libris since 2003. Voyager has been around for decades and Ex Libris has moved to newer, cloud-based systems, and will eventually cease maintenance on the older product. SWOSU's collections have grown substantially since 2003 creating more and more data for the Voyager system to house. A renovation project for the floors in parts of the library was announced prior to the implementation. The renovation would require bound periodicals to be stored elsewhere in the library or offsite. Space was also needed for a donated archival collection donated to the library.

Librarians familiar with an ILS migration remember the initial reports from the new service describing inconsistencies and errors found during the switch. Ridgeway's team found tens of thousands of unmatched barcodes for bound journals and other serials. Additionally, thousands of microforms suffered from mapping errors or had never been assigned a location at all. Ridgeway cited the large number of people working in SWOSU's Voyager system since 2003, often with minimal training, and Voyager's complexity, and lack of maintenance as the primary culprits for these errors.

Faced with thousands of issues and a limited time to address them, Erin and her team had to make some tough choices. The flooring work and the new archival collection required moving heavy bound journals and microform cabinets back and forth to temporary housing. However, correcting the many mistakes associated with these collections by hand would have been impossible. The collections were due to be weeded anyway so the team began the process of withdrawing items and sending them off to be recycled.

They cross-referenced their electronic journal holdings with the physical to ensure adequate coverage and discarded the oldest materials. (The largest program on campus is nursing and those instructors prefer articles within the last five years.) They checked usage, looked at cost and overlap of collections, and all of the things involved in electronic resources collection development. The most difficult part of the process, however, was negotiating with liaison librarians to let go of collections in their subject areas. A few rare microform collections are still in Ridgeway's office.

Cooperative Cataloging Projects: Managing Them for Best Results

Charlene Chou and Steve Shadle

Reported by Elizabeth Miraglia

Steve Shadle and Charlene Chou presented on managing cooperative cataloging projects. They went over factors that should be considered before taking on cooperative projects such as the size and scope of the collection, the language skills needed, what sort of staffing and organizational support would be needed, and how the records and metadata would be processed. Shadle discussed the Open Access Journal project, otherwise known as DOAJ, that has been an annual CONSER project since 2010. The project was borne out of a desire to increase e-journal record creation in the CONSER database. DOAJ was selected because the resources were Open Access, peer-reviewed, and had significant use. In order to ensure as much participation as possible, there is a need to keep barriers to participation low: each year an initial survey goes out to member libraries who are able to set their own language and volume capabilities, ensuring that no one library is asked to do more than they are able or willing. This year marked the first year that the project allowed MSC coding for libraries who felt comfortable providing descriptions in more difficult languages (Indonesian was cited in particular) but who did not have the capacity to complete authority work for full PCC encoding.

Chou presented several Chinese language cooperative cataloging projects. The Dacheng Old Periodical Database Project has helped to create records for a large Chinese language periodical database. The records start with brief bibliographic records created using provider-supplied metadata in a spreadsheet. Due to a number of metadata issues, the project is currently on hold, but there are plans to continue in the future. Fuller records will be created and contributed to OCLC. The plan is to have the full database available through Collection Manager when it is finished. This session also discussed the goals of the Council of East Asian Libraries (CEAL) to engage in more cooperative cataloging projects in the future. There is a focus now on engaging with standards organizations, and CEAL has already made recommendations to NISO concerning retaining both vernacular and transliterated titles in records. They also hope to engage more with the CJK CONSER funnel to create more high-quality records for CJK serial titles. Lastly, CEAL aims to become even more involved with educating and fostering communication with vendors to hopefully ensure better metadata in the future.

Cultivating TALint: Using the Core Competencies as a Framework for Training Future Information Professionals

Marlene van Ballegooie and Jennifer Browning

Reported by Sofia Slutskaya

Marlene van Ballegooie and Jennifer Browning of the University of Toronto libraries spoke about TALInt: the Toronto Academic Libraries Internship. The TALInt program, based on the principles of the workplace integrated learning, gives students the opportunity to enhance the quality of their learning through real workplace experience and bridges a gap between graduate education and workplace expectations. The TALInt program is a collaboration between the University of Toronto Libraries and the University of Toronto iSchool. Currently enrolled iSchool students, selected through a competitive process, work at the University of Toronto Libraries 15 hours per week for up to two years. The program currently enrolls 30 interns.

The presenters discussed the metadata management unit approach to working with TALint interns. The first students were hired in 2017 to help in providing e-resource access and in troubleshooting e-resource problems. The decision was made to use core competencies for electronic resources librarians as a framework for student training and as a tool to document students' development during the program. The presenters provided specific examples of how various core competencies were integrated in the students' learning agendas, training plans and work assignments.

The unit decided that student learning agendas, that are required by iSchool and are created in collaboration with the workplace supervisor, can be incorporated in the unit internal wiki used for documenting the unit's policies and procedures. The students' wiki spaces were private and only visible to students themselves and their workplace supervisor. Each student's space in the wiki contained four columns. The first column listed competencies as they appear in a NASIG document. The second column highlighted relevant resources such as articles, webinars and workplace documentation. Both students and workplace supervisors could use the third column to record the tasks and projects related to each competency. The final column was used for students to reflect on what they learned.

The approach is very useful as it offers background information for each competency and helps to measure progress for both the student and the mentor. Presenters went into more detail about students' learning tools and skills related to each competency. For example, as part of achieving communication competency, reciprocal sharing was encouraged to give students opportunities to present their classroom projects to the library staff. Students were also encouraged to create documentation and procedures in a team's wiki space. The other example was asking students to act as project managers for discreet projects at the same time they were taking a project management course. The presenter concluded by discussing the benefits of incorporating core competencies in working with students from the TALint program.

They listed such benefits as increased employability, improvement in both technical and soft skills, help in clarifying career paths, and in developing professional identity. The presenters' observations were supported by quotes from students who reported feeling more prepared to enter the workplace and having much better understanding of their field. The presenters also addressed their plans for the future and encouraged other departments and libraries to consider using relevant core competencies documents as a tool for skill development for both student interns and staff members.

Digital Preservation Task Force Update

Shannon Regan Keller, Wendy Robertson, and Kimberly Steinle

Reported by Dawn Rapoza

In this session, the presenters provided updates on the Digital Preservation Task Force's work and discussed recent developments in the field of digital preservation. The presenters introduced the origins of the task force: it was influenced by a vision presentation at the 2015 NASIG Conference. Keller and Robertson discussed projects in which the task force is engaged such as advocating for e-journal content preservation and expanding conversations with publishers to inform them of libraries' needs to preserve electronic content for their collections. Keeper's Registry is used at their institutions to conduct preservation analysis of electronic journal title holdings.

The presenters described tools and resources that the task force is developing to make available on the NASIG website for use by librarians, publishers, third party preservation agents and other interested parties. The tools include "Digital Preservation 101", a guide to Keeper's Registry, and talking points and questions to discuss with publishers about digital preservation. Keller and Robertson highlighted some integral questions related to communicating with publishers such as: Do contracts (including those with societies) make provisions for providing perpetual access to paid content through archiving service, including supplementary materials? How is integral content differentiated from additional content with regards to preservation and perpetual access?"

Steinle's portion of the presentation focused on Duke University Press' use of an in-house platform for preserving content digitally, third-party partnerships with LOCKSS, CLOCKSS and Portico, and other preservation partnerships. Among the preservation partnerships that she discussed was Project Euclid, a project with Cornell University, and the challenges associated with it. Steinle also discussed challenges associated with making archived content usable such as maintaining print copies, working with multiple platforms for different types of content (e-journals and e-books), sharing metadata with discovery partners, and the costs associated with preservation. Duke University Press is considering how digital content can be preserved to deal with some of these challenges.

The task force is currently developing a survey to determine the best use of their efforts and NASIG's efforts in digital preservation. A future project under consideration is collecting examples of digital preservation statements and policies from various institutions and sharing them through NASIG.

Embedding Collective Ownership into a Systems Migration

Paige Mann and Sanjeet Mann

Reported by C. Derrik Hiatt

This was not the typical systems migration presentation. Scholarly communications librarian Paige Mann and systems librarian Sanjeet Mann, from the Armacost Library at the University of Redlands, did not focus on the mechanics of the migration. They did not tell the audience which integrated library system modules migrated well and which ones did not. Nor did they describe how the new system led to workflow changes. Instead, the presenters described how the library organized the migration effort in a way that involved the whole library and gave the entire staff a sense of ownership in the outcome.

Recognizing the magnitude of change that a system migration would bring, the Armacost Library's leadership team took deliberate steps to minimize the negative experiences sometimes associated with significant change. The library sought to make the migration a collaborative project and to maintain individuals' agency by involving everyone in decision-making.

To manage the migration, the library organized three teams that handled specific parts of the project. All library employees served on at least one migration team and individual workloads and strengths were considered when establishing teams. Each team had a core of "insiders"—experts in the team's area of responsibility. There were a few "outsiders"—people whose regular work was not directly related to that team's specific focus so they could offer new perspectives and questions. Teams also included at least one or two people from each of the other teams to serve as bridges to the other teams' work. Library leadership tried to emphasize that everyone was learning at the same time. This helped staff members feel safe taking an active role in learning and decision making.

Paige Mann described some approaches to team meetings that had helped improve participation and productivity. One team started its first meeting with a card game, which established an expectation of team members sitting around a table (not spread across the room) and interacting. Paige suggested assigning homework in every meeting so that team members are more prepared for migration. Meeting agendas should also be provided a week in advance. She also suggested discussing foundational principals with the group, such as the following:

- Each person has something to contribute.
- Fear and anxiety are normal.
- Support one another and make room for mistakes.

Sanjeet Mann discussed the importance of learning as a part of the system migration process: "A willingness to learn continuously and collaboratively is perhaps the single greatest attribute needed for collective ownership to succeed." Learning is iterative, and we should value unsuccessful experiences as learning opportunities. Consider how to build into our processes a safe place to fail and to learn. We should also learn collectively and make big decisions as a team, relying on different people's strengths.

Ethical Dilemmas in Collection Development of Open Access Electronic Resources

Amanda Echterling

Reported by Maria Aghazarian

In this session, librarian Amanda Echterling discussed some of the unique ethical dilemmas she has encountered in her role as the head of licensing and acquisitions at Virginia Commonwealth University (VCU) Libraries. Echterling began the discussion by sharing the framework of professional ethics and addressing the essential task that librarians undertake in distinguishing between personal code and professional duty. In addition to the ALA Code of Ethics, ALCTS has the "Statement on Principles and Standards of Acquisitions Practice" for acquisitions librarians.

Echterling also acknowledged that while many librarians agree that collection development is important for Open Access (OA) resources, very few libraries implement practices for OA resources or include them in their general policies. OA is merely regarded as a format or business model, and libraries are supposedly business model agnostic. Echterling, however, presents two compelling cases which pit ethics against compliance with professional ethics and best practice compliance.

VCU has an OA article processing charge (APC) fund for faculty authors. The APC funding model for OA has created an imbalance of power between publishers and authors. Echterling says that in our rush to OA, we have established a consumer marketplace; publishers, in their stress to manage these transactions, are setting the rules for engagement and how they collect their money. Publishers set random, undisclosed terms that lack transparency; some publishers expect one-week turnaround for payment and will charge extra for receiving late payments or issuing invoices. Other publishers, such as Nature/Palgrave, will call debt collectors for unpaid APCs. Librarians have the opportunity and responsibility to push back against unfair practices in this area.

Another questionable business model Echterling highlights is when the library was approached by commercial entity Reveal Digital to contribute seed money for an OA venture—digitizing Ku Klux Klan (KKK) newspapers. The goal of the project was to create a comprehensive database of KKK newspapers that would convert to OA after an embargo of a few years. Libraries that contributed materials or funding would be able to have access before the project went OA. Echterling highlights several reasons this was problematic. The website does not contain any editorializing or contextualizing for the materials that it presents, but rather uses sales-pitch language. The extent of anti-Klan voices is limited to two newspapers. The materials being digitized showed the KKK in a positive light that only served to showcase white supremacy rather than the diversity and dissent promised by Reveal Digital. Echterling could not in good faith support a project that made voices of white supremacy OA while voices of dissent remained behind paywalls. This presented a conflict in the framework of professional ethics.

Echterling urges librarians to give more scrutiny to OA projects, especially when libraries are called upon to be funders. Investigate the project rather than taking vendors at their word, and hold editors of projects accountable for corrections and necessary context. Librarians need to think about OA as more than a format or business model. A very engaging question and answer session followed.

From Content Creation to Content Delivery: Partnering to Improve E-Book Accessibility

Melissa Fulkerson, JaEun Ku (Jemma), Jill Power, and Emma Waecker

Reported by Megan Kilb

Emma Waecker of EBSCO began the session, providing a definition of accessibility: designing products, devices, services, and environments for people with a range of disabilities, including vision, hearing, mobility, learning, or cognitive disabilities. Given population trends, we are likely to face an increased need for accessible online materials. E-books are most accessible when content creators and platform providers prioritize it as part of normal production workflows. Content creators can include semantic tags for document structure and tables, provide alt-text with images, and choose e-pub formats over PDFs to make their content more accessible. In turn, platform providers can ensure ingest pipelines preserve features added by content providers, include meaningful structure on webpages, and develop and test assistive technologies for their platforms. Internally, EBSCO conducts staff training across the organization to raise awareness around accessibility issues. Externally, they work with publishers to incorporate more accessibility-friendly features into the content publishers create, and they also solicit feedback from users who represent various disabilities.

Melissa Fulkerson from Elsevier detailed how their workflows and culture support accessibility. Elsevier requires authors to include tags and captions on all images, they use third-party vendors to generate e-pub files and create written scripts for all supplementary media content. Looking ahead, Elsevier is working to achieve greater buy-in among all stakeholders for the e-pub format, since it is more accessible than PDF. They also hope to include alt-text in all products across their portfolio, which represents both their biggest opportunity in terms of impacting users, and challenge, because of the large volume of content. Externally, Elsevier is refining its VPAT service, while internally, they launched a staff training program to expand awareness around accessibility in all position types across the company, from technologists to copy editors and acquisitions editors.

Jill Power from EBSCO Publishing described best practices, tools, and processes EBSCO uses to test their platform. She pointed to several automated online tools such as browser extensions in Chrome and Firefox, HTML Codesniffer, and Deque Corporate's aXe. These automated solutions are a good starting point, but since they typically detect less than half of all accessibility obstacles, manual testing is usually necessary to check for issues such as the tab order of content on the page, re-sizing issues when zooming in or out, headings, and other landmarks related to the page structure, and the content within alt-text for figures and images.

JaEun Ku from UIUC detailed accessibility challenges in the library environment: multiple e-books platforms to maintain and support, multiple content types to consider, and a lack of expertise among developers and staff. To engage these challenges, UIUC has implemented some strategies to prioritize accessibility for departments across the library. Before gaining access to the library's content management system, library staff must complete basic accessibility training. Additionally, staff in the library's in-house publishing program work closely with content creators to ensure content is "born accessible" to minimize post-publication clean-up. They also rely on the university's A11y First Editor, a web editor designed to build accessible webpages.

The Future of Cataloging in a FOLIO Environment

Natascha Owens and Christie Thomas

Reported by Sanjeet Mann

The Future of Libraries is Open (FOLIO) is an open-source, extensible library management system (LMS) platform attracting attention throughout the library world for its innovative approach to library management and broad range of development partners, including libraries, vendors, and commercial organizations. At this session, Natascha Owens and Christie Thomas from the University of Chicago Library provided an overview of the FOLIO community and delved into the development process for FOLIO's Inventory app that is scheduled for initial release in January 2019.

Owens and Thomas belong to FOLIO's Metadata Management Special Interest Group (SIG), one of eleven project teams that are using their functional expertise to define FOLIO's necessary functionality and give feedback to developers. Interested readers can use the FOLIO Wiki (https://wiki.folio.org) to follow the progress of FOLIO development that includes updates from each SIG and smaller working groups created to tackle specific issues.

The Metadata Management SIG envisions the Inventory app as the piece of FOLIO that presents bibliographic information in a consistent, abstracted format, regardless of the original data source or content description rules. Initially the app will be able to ingest, display, and edit records and utilize authorities, working in tandem with a metadata creation app called MARCcat. The Inventory app will support bibliographic records in MARC format and holdings records in a non-MARC format. Additional formats for bibliographic records and the ability to generate MARC holdings will come later.

The app's interface is being developed through online Slack conversations and in-person workshops involving catalogers on the Metadata Management SIG, user interface (UX) designers, and software developers. Each party brings distinct skills to the table and relies on clear communication to bridge differing worldviews. Owens described the experience of explaining a cataloging workflow to a UX designer, adding that patience, willingness to ask lots of questions, and openness to rethinking assumptions are essential for this type of cross-domain collaboration.

The SIG formed temporary working groups to address specific requirements for the Inventory app, such as which data fields are needed to manage holdings and items, how to handle Resource Description and Access (RDA) resource type and format type fields, how to represent analytics and bound-with items, and the creation of the advanced search interface. Owens added that electronic resource management system functionality is in development by two German library consortia working with Knowledge Integration (the developer of KB+).

Audience members asked about the institutional commitment needed to support librarians dedicating their time to FOLIO development and sought more detail about FOLIO's support for statistics and consortial resources. Attendees also debated the function of FOLIO's Codex, which was initially intended to be a record-searching app that would bring together results from the various FOLIO modules. The role of the Codex, much like the feature set and UX design of the Inventory app, continues to evolve through dialogue and community engagement.

How We Talk about Assessment: A New Framework for Digital Libraries

Caroline Muglia

Reported by Mary Bailey

Muglia's new framework for assessment of digital libraries is based on work done for an Institute of Museum and Library Services-funded project. The project includes the University of Southern California and five other libraries spread across the United States with an advisory board from the Digital Library Federation Assessment Interest Group.

While most libraries try to access use based on publisher statistics and Google analytics to demonstrate value and write reports to show that value, some librarians had a feeling something was missing. What about the reuse, repurposing, and remixing of information? Shouldn't that count too? If so, how do you get it? What libraries are doing now does not begin to explain how users utilize or transform unique materials in digital collections. There is also a lack of standardized assessment approaches to the collection of this information. These factors all make it difficult to show the value of digital collections.

The grant team began with a survey to discover the method and reason for collecting statistics. About 40 percent of respondents indicated they collect reuse statistics that are acquired through social media metrics, alert services, and reverse image look up.

Major barriers to this type of collection include a lack of time, staff, money, standards, and expertise. There is also a lack of methodology, or worse, collecting use statistics is not a focus for the library.

The work of the project includes the goal of providing a toolkit for librarians. The group is looking into the technology and the functional requirements, and later is creating a dashboard. But more questions exist, especially dealing with privacy issues. Many more questions surfaced as information was studied from the surveys.

Key takeaways of the study at this point include cultural heritage groups needing more technology and support for technology. A streamlined assessment process is also desired. They determined that training on how and what to gather is necessary as well as increased understanding of the meaning of statistics. Common standards would be helpful in sharing information among institutions.

The grant team still has more work over the next year, but the questions being generated are helping shape a new way of showing the value of the digital collections.

Journal Collection Analysis and Evaluation for Outreach and More!

Nat Gustafson-Sundell and Evan Rusch

Reported by Dave Macaulay

Evan Rusch and Nat Gustafson-Sundell presented on the Journal Collections Analysis Database (JCADB), a reporting system that efficiently consolidates a wide range of data about journal collections from a variety of sources. Rusch described how development of the system was prompted by a desire to improve the library's capabilities for journal collection analysis in general. Specifically, the library wanted to provide evaluative information about journal collections for liaison librarians to use in outreach to academic departments. Early efforts to produce reports comparing subject-specific lists of titles indexed in A&I database with the libraries' holdings, and showing how individual titles related to journal package subscriptions, proved to be time-consuming; Gustafson-Sundell came on board to help with developing a more efficient and sophisticated reporting system with better data visualization capabilities. In the JCADB "keylists" of journal titles in a particular subject area are the organizing principle of reports that provide a broad range of information about availability, cost, usage, and impact for each journal title; these reports are supplemented by multiple tabs summarizing availability of journals and usage by provider, as well as by categories based on SJR impact factor.

Gustafson-Sundell covered the technical aspects of JCADB's workings and how it was developed. He explained that to increase the accuracy of matching the core journal keylist with the many other sources of information used in the reports, the system used all the practical match points available which are typically five different fields. The "standard title", a highly processed version of the journal title designed to maximize accurate matching with other lists by eliminating variations, is used as the primary match-point. The standard title is created in MS Excel by applying a set of Visual Basic (VBA) and Excel functions to a list of journal titles, though other methods such as OpenRefine, Python, or MySQL programming can also be used to automate the process; a Python version of the standard title processor has been developed at MSU-Mankato and is the most likely candidate for sharing with other libraries in the future. It was stressed that JCADB does not require the use of any specific tool or method to perform its data processing, data matching, and report production work.

The final portion of the presentation was concerned with the development methodology and staffing for the project. The Prototyping Project Management Life Cycle (PMLC) approach involves a succession of brief planning, development, delivery, and feedback stages that allows for lost-cost experimentation where successes could be built on incrementally. Conversely, anything that didn't work well or cheaply could be discarded. In the early stages of the project, Gustafson-Sundell worked on the project by himself, but had some assistance with a technician who was available during periods of lighter workloads. Later on, a case was made to hire a graduate assistant to work on coding, and this was the only direct cost associated with the project. Resource costs have increased throughout the project, but these are far outweighed by the benefits to the library, not only in terms of improved liaison service, but also in training of personnel and improved morale from participation in a successful project.

Future plans include adding support for additional types of usage data such as COUNTER JR5 reports, and for other formats such as books and ebooks; inclusion of citation analysis information; further collaboration with academic departments in determining valued titles; and development of a suite of tools that is shareable with other libraries.

Knowledge Management for Collection Development

Julia Proctor

Reported by Sara Hills

Julia Proctor began a new position, Collection Services and Strategies Librarian, at Penn State University Libraries. Penn State University Libraries created the position to address a fundamental issue of knowledge management--how to ensure that institutional collection management knowledge, policies, and future directions are communicated and implemented at all locations in the present and in the future?

Because the position was new to both Penn State Libraries and the presenter, Proctor determined that learning about and thinking about her position through the lens of knowledge management would be a helpful way to proceed. Proctor provided an introductory background on knowledge management. The specific concepts in knowledge management that Proctor addressed were tacit versus explicit knowledge, the importance of creating shared meanings to build shared cognitive structures, knowledge gaps (both perceived and unperceived), and the role of communication and perception in sharing knowledge. During her introductory background on the Penn State University Library system, Proctor listed some of the issues facing the collection management team both at the branches and at the flagship University Park location. As part of her learning process, Proctor met with various collection management stakeholders, and she shared the summary of those meetings. Staff expressed concern to Proctor that they did not have a trusted, updated source of information other than certain colleagues (acquisition staff), and they were not sure where to go to obtain information.

After these meetings with selectors, Proctor realized that much of the knowledge that she needed to communicate was tacit knowledge, which is the hardest to codify as it comes from experience and intuition. Proctor needed to find a way to streamline communication and to change how selectors found their information. She developed an action-oriented, consistent, and transparent communication plan to focus on creating shared meaning. Another key aspect of the communication plan was anticipating the knowledge gaps of her selectors, but she struggled with how to anticipate those knowledge gaps. Proctor determined that the best way to address knowledge gaps was to create an information center with static information that includes an FAQ and a revitalized intranet. She inserted information into the existing collection development workflows to address unperceived knowledge gaps.

Although Proctor has made improvements to knowledge sharing and management, she admitted it is an ongoing process. Change is endemic. Proctor presented on the importance of communication as a two-way conduit: not only was she sending information about and curating institutional knowledge, she was also learning about the institution and staff. Proctor was clear that she has her own knowledge gaps, and she is seeking to address them. For example, she is hosting selector forums as a way to meet with all selectors for a conversation. Two-way communication requires trust and this takes a while to build. She must also establish her credibility as a resource. Next steps for Proctor involve assessing her previous strategies.

Licensing by Design: A System(atic) Approach

Michael Rodriguez

Reported by Mandi Smith

Michael Rodriguez, the licensing and acquisitions librarian at the University of Connecticut, discussed how to incorporate licensing into a library's workflows and systems using the next generation integrated library system (ILS) Alma. After transitioning the license management information into Alma, the library began displaying license details to users.

The session began with the speaker informally polling the attendees about their systems and use of public-facing policies about e-resource terms. Ultimately, only about 20 percent of the attendees currently use public-facing policies to describe e-resource terms, and even fewer used Alma to do it. After the polls, the speaker offered us more background about his library's transition. Previously, they had used an open-source electronic resource management (ERM) system, CORAL, to manage their licensing. The library decided to manage licensing via Alma as there already had been heavy investment in the ILS and it allowed for better integration. All of the data was migrated manually so everything could be reviewed and cleaned up before being placed in Alma.

The speaker then offered a web tour of Alma/Primo Analytics. He reviewed the dashboard, inventory, history, license terms, various fields available, notes, and examples of licenses and amendments. His demonstration included how to search for a license, define and create terms, change the display of terms, and utilize notes to track the licensing workflow process. After showing how Alma can manage licensing workflows, the speaker presented the public display. Additionally, the audience learned the importance for users to view the licensing terms. In addition to potentially preventing researchers from accidentally using something incorrectly and being sued (which happened at the speaker's institution), it promotes transparency, serves as documentation that the library is fulfilling its obligation of trying to educate authorized users, and has positive implications internally for improving library workflows including the elimination of the loaning spreadsheet.

The migration had several positive impacts at the University of Connecticut. It helped support licensing centralization which allowed for consistent terms and greater buying power. It also promoted licensing simplification by reducing exceptions to interlibrary loan after the library created an "all or nothing" approach. The migration also helped prioritize what values are important. As the speaker discussed, why negotiate for values that aren't worth displaying to users? Since electronic course reserves were discontinued at the speaker's institution, the number of questions about rights has increased, and the migration has helped with answering these questions. Additionally, the library has crafted a policy for use of licensed electronic resources. The focus of such a policy should include not only compliance to licenses, but also users' rights. In the future, they hope to craft more statements and incorporate more user outreach.

MARC Metamorphosis: Transforming the Way You Look at E-Book Records

Jeannie Castro, Richard Guajardo, Matthew Ragucci, and Melissa Randall

Reported by Martha Hood

Whether a library individually creates records in their catalog, exports from OCLC, or obtains them directly from publishers or vendors, the quality of MARC records has always been one of importance to libraries. In this session, speakers from both the University of Houston and Clemson University shared the life cycle of an e-book—from acquisition to discovery. Speakers from both institutions also provided beneficial insight into decisions made regarding cataloging standards applied and workflows in the departments. As a publisher of many e-books, a speaker from Wiley illustrated their process of MARC record creation and delivery. The Wiley cataloging team confirms record data, adds any missing fields, and performs manual cataloging when needed. Most of their records are also RDA-compliant.

After learning about different catalog practices, Jeannie Castro shared her analysis of bibliographic e-book records from the two universities. Using the Program for Cooperative Cataloging (PCC)'s Provider-Neutral E-Resource MARC Record Guide, her focus for the study was on the 100/700, 245, 490, 505, and 650 MARC fields (both 505 and 650 are not included in PCC guidelines). Unable to focus on the "held in common" Wiley titles between the two schools, analysis was focused on records which were supplied by Wiley versus Serials Solutions MARC update records. With 51 titles in common, analysis showed that Serials Solutions records needed to be improved, especially in the 245 field. About 12 percent had incorrect information, almost 6 percent had typographical errors, and nearly 25 percent were not RDA-compliant. With Serials Solutions records, 98 percent did not have subject headings, and 94 percent did not have table of contents data. If a patron were to search by subject or keyword, the results showed that they would encounter significant roadblocks. After this analysis, Wiley clearly provided data-enriched bibliographic records for their customers. Interestingly, when comparing Clemson's cataloging practices against Wiley's records supplied from OCLC there was a perfect match.

Regardless of purchasing method, 143 Wiley titles were found to be held in common between the two universities. In the 100 and 700 fields, analysis showed they matched 93 percent of the time. The record of responsibility did not match 3 percent of the time in Serials Solutions records. Serials Solutions records provided very few subject headings (1.5 percent) and only 70 percent of the records had 505 fields. After analyzing the results, librarians should ask, how do patrons even discover an e-book? Previous University of Houston research revealed that almost half of their students searched by title in their web-scale discovery service. Again, those browsing by subject or keyword would be unsuccessful in finding specific e-books needed by the user.

In conclusion, this presentation honestly revealed how important the need is for libraries to receive high quality MARC records. Results showed the value of a set of best practices when working with various vendors and publishers. It is essential that MARC records delivered to our libraries are those which contain accurate data in primary fields along with data which enriches our students' success. Better communication of our expectations with vendors and publishers is a good start toward this goal.

Navigating 21st-Century Digital Scholarship: Open Education Resources (OERs), Creative Commons, Copyright, and Library Vendor Licenses

Rachel A. Miles and Heather Seibert

Reported by Kendra Macomber

Heather Seibert, the scholarly communications technician at East Carolina University, started the presentation by explaining Open Educational Resources (OERs) and their use of Creative Commons Licenses. Creative Commons Licenses, founded in 2001, are applied to works already under copyright and make it easy to share them. These licenses are ideal for shareable content because they are both easy to understand and are machine readable. Additionally, these licenses meet copyright standards both in the United States and internationally, making them an ideal solution for widely shared resources, like OERs. The flexibility and ease of these licenses are reflected in their use, which has risen exponentially since their inception, with 1.1 billion openly licensed works.

The Creative Commons Licenses include: Attribution (CC BY), Attribution-ShareAlike (CC BY-SA), Attribution-NoDerivs (CC BY-ND), Attribution-NonCommercial (CC BY-NC), Attribution-NonCommercial-ShareAlike (CC BY-NC-SA), and Attribution-NonCommercial-NoDerivs (CC BY-NC-ND). For a description about these licenses see https://creativecommons.org/licenses/. These licenses have corresponding icons that can be placed on resources, so users can know what is permissible at a glance. For example, Siebert explained that the game Cards Against Humanity is under a Creative Commons License CC BY-NC-SA and allows users to make their own cards as long as users provide attribution and do not earn any profits from them.

With her part of the presentation, Siebert provided a professional development opportunity that demystified Creative Commons Licenses and showed how they make it easier to share materials and resources.

Rachel Miles, the digital scholarship librarian from Kansas State University, discussed how her library addresses copyright inquiries. She introduced the resource "A Framework for Analyzing any US Copyright Problem" (http://www.k-state.edu/copyright/docs/framework_for_analyzing_any_copyright_problem_with_links_added.pdf), which she uses when investigating copyright questions. This framework provides a step-by-step method to finding answers to copyright questions. Miles discussed how acting as the copyright resource on campus required a great deal of self-education that included personal research, online courses, and conferences. One important thing Miles learned through this research was that the individual making the copyright inquiry must make the final decision, and legally she could not tell them what to do.

While answering copyright questions from patrons, Miles realized that much of her work overlapped with the electronic resource librarian, Christina Geuther. Miles and Geuther decided they needed to make more information available to their campus community, so they collaborated to create a LibGuide (http://guides.lib.k-state.edu/UsingContent).

Providing public awareness was especially important to Geuther, who works with the licensing of e-resources at the University. E-resource licenses can override many provisions of copyright, affecting interlibrary loan, systematic downloading or mining, and concurrent usage. To ensure that users know about these restrictions, Geuther utilized the license module in Alma so it shows in the discovery layer of Primo. The librarians are empowering their community to make smart decisions due to the collaborative work regarding copyright and e-resource permissions at Kansas State University.

The New Dimensions in Scholcomm: How a Global Scholarly Community Collaboration Created the World's Largest Linked Research Knowledge System

Heidi Becker, Ralph O'Flinn, and Dr. Robert Scott

Reported by Scott McFadden

Digital Science is a portfolio of companies that support small innovative software companies. Started in 2009, most of its founders come from academic backgrounds. Six Digital Science companies decided to cooperatively create a new resource called Dimensions. Dimensions is a database of publications, awarded grants, patents, and clinical trials, with more content expected in the future. Publications data consists of over 90 million records, with metadata and citations derived from multiple databases. Grants data comprises 3.7 million grants, from over 250 global funders, while patent and clinical trial data covers multiple countries in North America, Europe, Asia, Australia, and New Zealand. Data from the various content sources are linked. For example, data on clinical trials are linked to publications that report on those trials, and to the grants which supported them.

Dimensions was created because citation metrics are often behind expensive paywalls, and other obstacles also stand in the way of the discovery of research data. It can be difficult for scholars to piece together the larger arc of the research cycle. Dimensions aims to integrate the data through the entirety of the research cycle, from pre-publication, through publication, to post-publication. Using enriched and interlinked metadata, Dimensions makes it easy to navigate between different areas of the research process.

Digital Science recognized that it could not create such a database alone, so worked with over 100 global partners over a period of two years. This partnership provided information about the actual needs in research discovery, administration, and management, and identified needs within different disciplines and regions.

One such development partner was the University of Georgia (UGA), a large comprehensive public research university, which needed research analytics tools to carry out peer comparison and collaboration discovery. UGA found Dimensions to be a natural fit for its needs. All UGA stakeholders, such as researchers, administrators, information scientists, etc., were involved in the development process. As a use case, UGA attempted to identify areas in which its research enterprise is competitive compared to peer institutions. Use of Dimensions' analytical tools allowed UGA to easily identify recent research areas of strength, to compare itself with aspirational peer institutions, and to identify UGA "stars" in competitive areas. This allowed UGA to identify potential research partners at other institutions, nominate star researchers for major awards, identify faculty recruits, and other important functions.

The University of Alabama at Birmingham (UAB), a comprehensive urban university, was another development partner. UAB wanted to create a new, cohesive system to update its old-fashioned faculty profiles. This resulted in the creation of Scholars@UAB, an interface which organizes and coordinates online faculty profiles. Integrating Dimensions functionality into the system allows faculty to link their publications to the supporting grant, associated clinical trials, and category of publication. In this way, faculty are able to learn more about their own areas of research, find other scholars working in that field, identify new potential sources of funding, and compare successful grant proposals. Scholars@UAB is live, and further Dimensions integrations are currently being worked on.

Open Access: How Accessible is It?

Lisa A. Macklin

Reported by Kelly Denzer

Lisa A. Macklin is the Director, Research, Engagement, and Scholarly Communications at Emory University Libraries. Macklin opened her talk with a brief definition of open access and scholarly communication. She stressed that librarians have always supported researchers, and open access presents a catalyst for librarians to add further support through the promotion of openly shared knowledge creation.

Macklin briefly reviewed open access projects such as The Budapest Open Access Initiative, the more recent SPARC PLoS 2014 brochure on the fundamentals of open access, and the OA 2020 Initiative working on new models of open access publishing. She also discussed a current project, TOME (Toward an Open Monograph Ecosystem), that focuses on the monograph in humanities and social sciences.

With these projects in mind, Macklin reminded the audience that scholarly communication and open access come under the purview of all information specialists and by expanding our understanding and definition of open access we will help to advance current and future initiatives. She suggested many ways to achieve this, including creating a set of guidelines to assess open access initiatives at our institutions, creating open access collection development policies, library-supported publishing, and by digitizing our library collections and making them openly available. She asked the audience to consider the accessibility of open access materials.

Macklin concluded her presentation with a challenge to the audience to reach out to new voices in the conversation around open access. For those who are early in their career, she encouraged seeking mentorship opportunities. Regardless of where you are at in your career, she reminded the audience to consider preserving presentation work or writings in an open repository.

Serials Clerk to Dean—20 Years with a Head in the Clouds

Jeff Steely

Reported by Charlene N. Simser

1998 NASIG student grant winner Jeff Steely presented on his journey from serials clerk to dean of libraries and offered up some sound advice to session attendees. Steely hadn't started life knowing he wanted to be a librarian, but perhaps his school media specialist (Mrs. B.) influenced him, and he recalled great experiences at both the public library in his hometown as well as his high school library.

Steely considered careers in architecture and chemistry, but ended up with a degree in history and religion. He supported his wife's career moves and often was the stay-at-home dad, but when his wife accepted a job at Baylor University, Steely took a part-time temporary job and soon realized "This is what I should be doing."

As a serials check-in clerk, Steely had a flexible boss who let him work on other projects, including an integrated library system migration. While working, he completed library school at the University of Texas at Austin. His first professional position was serials librarian at the U.S. Courts in Chicago. He returned to Baylor, holding numerous positions including outreach services librarian, assistant director for client services, assistant dean, director of central libraries, and associate dean, before applying for a job in 2015 at Georgia State University where he is currently dean of libraries.

Steely provided insights on his management and leadership style and suggested numerous books that he found inspiring, including Reframing Organizations by Lee G. Bolman and Terrence E. Deal and The Fifth Discipline by Peter M. Senge. He insisted there is a place for introverts in our profession, even in leadership positions, and recommended that librarians should have a growth mindset, which assumes that failure is a growth opportunity. Recognize that you will inevitably make mistakes. His advice for job seekers is to do your research on the institution, scour their website, learn what you can about members of the search committee, and practice your answers to typical questions.

The Transfer Code of Practice: Overview and Updates

Jessie Copeland

Reported by Mandi Smith

Jessie Copeland, Head of Electronic and Continuing Resources at Emory University and member of the Transfer Code of Practice Standing Committee, offered attendees a brief overview of the Transfer Code of Practice and an update for the Enhanced Transfer Alerting Service. Copeland began the presentation by detailing just what the Transfer Code of Practice is. NISO's Transfer Code of Practice is a voluntary code for journal publishers containing best practices for transferring and receiving journals. In addition to offering a formalized role for transferring and receiving journals, those best practices also include timelines for transfer actions and communications, suggestions on how to handle identifiers and URLs, and the use of transfer alerting services. The Transfer Code of Practice helps to ensure that the transfer process occurs with minimal interruption. This is important because journals frequently change publishers and a lack of communication during transfers often leads to disruptions in the supply chain and, ultimately, the loss of library subscriptions. The history of the Transfer Code of Practice also was discussed, along with the information about the Transfer Code of Practice Standing Committee. The Transfer Code of Practice is governed by a group of librarians, publishers, and other experts. Currently, there are more than 60 endorsing publishers.

The speaker then discussed the Enhanced Transfer Alerting Service (ETAS). The ETAS consists of the Journal Transfer Notification Database, Transfer Notification List, and the Journal Transfer Notification form. ETAS no longer incorporates the use of a blog, but does still offer a RSS feed. Details available through the service include information about both the receiving and transferring publishers, important dates, and perpetual access information. Searching through the database is available via ISSN, transfer date, and multi-field, which can include titles, publishers, and more. The speaker demonstrated a live example of how to use the database. In addition to manually searching the database, libraries also can sign up for notifications with the aforementioned RSS feeds or via email.

The presentation was concluded with information about future plans for the Transfer Code of Practice. The committee is currently working on the revision for version 4 which will hopefully better accommodate changes in technology and terminology. They hope to have something definitive to send out for public comment to the library and publisher community sometime this calendar year. Additionally, the ETAS will move to the ISSN Center's servers. The migration will incorporate URL redirects and the same information should be displayed. Information about the migration will be sent out to participants of the ETAS listserv. In the future, the governing group potentially wants to discuss creating a code for platform changes/transfers in addition to the current protocol for journal transfers.

Transforming the Quality of Metadata in Institutional Repositories

Margaret Mering

Reported by Sofia Slutskaya

Margaret Mering's presentation covered University of Nebraska Lincoln (UNL) institutional repository metadata practices related to personal names and ORCID iDs and establishing sustainable metadata quality standards for personal names. Mering started her presentation with the overview of UNL institutional repository.

Established in 2005, the repository currently contains 98,000 unique items such as publications from colleges, departments, and academic centers, electronic thesis and dissertations, conference proceedings, book chapters, articles and other materials. The repository also hosts a few academic journals and their backfiles, as well as Zea Books imprint publications. The presenter used Google analytics data to show how the repository items are accessed: 57 % come from Google, 17 % from Repository itself, 5% from Google Scholar and only 0.01% from the library's discovery layer.

The presenter also discussed the institutional repository organizational structure and staffing. The department that reports to the system librarian has three faculty positions, one managerial professional staff, part-time staff that assists with metadata creation, and 40 hours per week of student help. Student assistants are tasked with scanning and uploading documents as well as metadata creation.

Mering shared a list metadata fields included in each record and described UNL digital repository metadata recording practices as they relate to names and disambiguating them. The presenter examined most common metadata issues and provided multiple examples of problems with punctuation, capitalization, foreign and compound names, and others. She also addressed the difficulty of establishing an author's identity due to the inconsistency of how information is submitted and the luck of one unique identifier. She highlighted difficulty with using such identifiers as an e-mail address, as the same author can provide different e-mail addresses for different publications, or the e-mail address can change if the affiliation changes.

Mering spent a significant portion of her presentation discussing ORCID iDs and the advantages and disadvantages of their use as a unique identifier in a digital repository. She also shared some data that shows how many UNL faculty members have ORCID iDs vs. VIAF (the Virtual International Authority File) authority records. The results vary greatly by discipline, so neither ORCID iD, nor authority record can be used to disambiguate the names in all cases.

Mering concluded the presentation by discussing the future of the UNL digital repository and the sustainable practices of creating and updating metadata. According to her, it is important to establish priorities, not to allow scope creep, to be proactive with maintenance, and to employ batch updating whenever possible.

Wrangle and Corral that License Agreement

Alexis Linoski and Carolyn Carpan

Reported by C. Derrik Hiatt

In this session, each presenter discussed the tools they use to help manage e-resource licenses and the licensing workflow. Alexis Linoski, from Georgia Tech, discussed Trello and Carolyn Carpan, from the University of Alberta, discussed her library's use of CORAL.

At Georgia Tech, a recent sudden increase in the licensing workload drove Linoski to look for a management tool. She settled on Trello (https://trello.com/) as the one best suited to her needs, but also pointed out that many different product management tools are available.

Trello displays projects on "boards," which contain "lists," which are made up of "cards." Each "card" represents a task. A board can be for an individual user or shared by a team for collaborative projects. Some features of Trello that Linoski highlighted:

- visual interface
- view can be filtered
- “power-ups” (apps to boost functionality)
- e-mail can be sent to a board to create a new card/task.

Linoski also offered some Trello tips:

- Users can create a card that includes frequently-used links or other features, then use that as a template for other cards.
- Users can forward an e-mail to a card’s Comments section. Linoski uses this feature by adding a card’s e-mail address in the “cc” field on vendor e-mails, so correspondence about a license is collocated on that license’s Trello card.
- Before creating a board, spend some time thinking about the process and the specific needs.
- Use Trello for something simple to become accustomed to using the product, before using it for a complicated process like license management.

Carpan described the combining of two units at the University of Alberta Libraries to form the Collection Strategies Unit. The new unit inherited two licensing databases from its predecessors—CORAL (http://coral-erm.org/) and the OCUL Usage Rights (OUR) database. Each database had different content, so the unit began a project in 2017 to consolidate the two into CORAL’s licensing module.

As of the time of the presentation, the consolidation project was still in progress. Carpan showed how an item display in the library’s discovery system presents ILL permissions (currently feeding from CORAL’s Terms Tool), while other usage rights display as an additional link (feeding from the OUR database). The goal of the project is to add rights information into CORAL for classroom copies, course management systems, and course packs.

Carpan described some of the challenges and lessons they have encountered. When the Collection Strategies Unit inherited the licensing databases, there were inconsistencies (e.g., licenses named by product, publisher, consortium, etc.), as well as missing information (e.g., license effective dates). Carpan also noted that CORAL’s Terms Tool is not searchable, making it difficult to find duplicate entries. The library’s IT team has helped with the latter by creating reports to search for duplicate link resolver entries. Meanwhile, the Collection Strategies Unit is creating a maintenance plan to keep the license database organized after completion of the project.