

# JSMIN, 2013-10-28 to 2013-11-01

## JSMIN Meeting Notes, Monday 10/28

Attending: Adam, Sarah, Kate, Jesse (for Bill), Jim, Colleen, Boaz, Naun, Robert, Mark

Housekeeping:

- For this initial sprint of JSMIN work, we reaffirmed the idea of determining day-to-day whether to hold or cancel the next day's standing 12:00-1:30 session. We also decided that a minimum of three participants from each institution would constitute a quorum, along with the appropriate JSMIN members for the agenda topic at hand, plus either Kate or Jim.
- Given technical difficulties with today's WebEx (which closed Joyce out of the discussion), we decided to discuss the Original Cataloging Working Group's ideas and recommendations, rather than Monograph Ordering as originally planned

Original Cataloging: Review of Recommendations, Ideas, and Suggestions

1. "The Original and Copy Cataloging groups held joint discussions during Phase 1 and we recommend combining these two groups for Phase 2. This group will need to work closely with the acquisitions and batch processing groups to make recommendations on workflow and related issues such as cross-training." We gave a GREEN LIGHT to this proposal to combine the Original and Copy Cataloging Working Groups for Phase 2, and agreed with the observation that this team will need to work closely with acquisitions and batch processing working groups on issues related to workflow, cross-training, etc.
2. "Training (and, where appropriate, documentation)." We gave a GREEN LIGHT to moving forward (continuing, actually) with consolidated training for 2CUL catalogers on an "opportunistic" basis. A YELLOW LIGHT to developing shared documentation, pending the development of a TSI shared documentation methodology.
3. "Developing guidelines for collaborative cataloging covering such areas as balancing demand and capacity, workflow and hand-offs, clarifying expectations, communication, etc." GREEN LIGHT. No problem moving forward together in this area, with the caveat that some guidelines and decisions may require, or at least benefit from, input from JSMIN (in particular, the departmental directors).

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## JSMIN Meeting Notes, Tuesday 10/29

Attending: Adam, Naun, Jesse (for Bill), Boaz, Jim, Joyce, Kate, Sarah, Colleen, Robert, Mark

Original Cataloging -- Review of Recommendations, Ideas, and Suggestions (contd.) --

1. "Identifying areas where changing collection priorities (e.g. as a result of collaborative collection development) may have an impact on cataloging workload." RED LIGHT: requires further discussion to determine who should own this issue.
2. "Identifying and evaluating vendor services of potential interest, e.g. vendor-supplied cataloging, shelf-ready processing, vernacular data, etc. This may progress to joint negotiations with vendors and establishing common service expectations." RED LIGHT: requires further discussion to determine who should own this issue.
3. "Representation on external bodies (e.g. CONSER) and associated activities including reporting and voting." GREEN LIGHT.
4. "Joint policy and standards development: this needs to take place within a framework that will accommodate differences due to contrasting collection priorities and service expectations." GREEN LIGHT.
5. "Investigating system-related services, including batch processing, reporting, troubleshooting, and their impact on workflow." YELLOW LIGHT: may be covered by other groups.

Acquisitions: Monograph Ordering -- Review of Recommendations, Ideas, and Suggestions

1. "Might Cornell be able to use its corporate Amazon account to order materials for Columbia?" GREEN LIGHT to explore idea.
2. "Might Columbia selectors be able to better streamline the ordering process by making better use of the POOF interface?" YELLOW LIGHT: request further information.
3. "Might the two institutions be able to share one ordering specialist for more difficult/challenging-to-obtain items?" GREEN LIGHT to explore idea.

Acquisitions: Monograph Receiving -- Review of Recommendations, Ideas, and Suggestions

1. "Meet and discuss findings with the other relevant working groups (Ordering, Copy Cataloging, Batch Processing)." YELLOW LIGHT: request further information.
2. "Explore points of 'harmony' and 'discord' revealed in Phase 1." YELLOW LIGHT: request further information.
3. "Explore further use of shelf-ready option": RED LIGHT: requires further discussion to determine who should own this issue.
4. "Explore further use of cataloging on receipt": RED LIGHT: requires further discussion to determine who should own this issue.
5. "Examine university accounting restrictions": RED LIGHT: requires further discussion to determine who should own this issue.

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## JSMIN Meeting Notes, Wednesday 10/30

Attending: Jesse (for Bill), Boaz, Jim, Joyce, Kate, Sarah, Colleen, Robert, Mark

Acquisitions: Print Serials -- Review of Recommendations, Ideas, and Suggestions

1. Make organizational structures similar more (e.g., re-centralizing checkin at Columbia, discontinuing series and sets orders at Columbia) RED LIGHT: requires further discussion to determine who should own this issue, especially issues regarding checkin or ordering.
2. Reconsider where binding and adding are handled. RED LIGHT: requires further discussion to determine who should own this issue.
3. Exchange information about serials in general and specific serial problems. Share procedural changes in how serials are handled. GREEN LIGHT to explore idea.
4. Explore combining title lists for more desirable service charges or broader collection development cooperation. GREEN LIGHT to explore idea.
5. Share documentation. GREEN LIGHT to explore idea. Any documentation must be portable.

## Cataloging & Metadata: Database Maintenance -- Review of Recommendations, Ideas, and Suggestions

We concur with the team's assessment that centralization vs. decentralization issues prevent much integration before a shared system. The group's report and their Phase 2 charge will be considered in conjunction with Batch Processing as there may be opportunities in batch processing, e.g., sharing processing scripts and programming tools developed in-house. The Phase 2 charge should encourage idea sharing in preparation for Alma.

1. Keep each institution's "database maintenance culture" similar to how they were pre-2CUL, especially since both systems would require major overhauls of maintenance procedures, policies, and personnel in order to make them work the same.
2. Share documentation. GREEN LIGHT to explore idea. Any documentation must be portable.

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## JSMIN Meeting Notes, Friday 11/1

Attending: Jesse (for Bill), Boaz, Jim, Joyce, Kate, Sarah, Colleen, Robert, Mark, Naun, Adam

## Automation & Technology: Batch Processing -- Review of Recommendations, Ideas, and Suggestions

Adam's suggestion that we "work outward from Alma" rather than trying to work existing batch processes into Alma was accepted as a principle.

1. To investigate and learn what batch functionalities and record load features are built in to ALMA and see how easily existing record load workflows at Cornell and Columbia can be expected to migrate. RED LIGHT: requires further discussion to determine who should own this issue. Alma dependent
2. Leaving established workflows in place, jointly experiment implementing MARC services with new vendors where practicable. GREEN LIGHT to explore idea
3. Explore the use of WorldShare Metadata Collection Manager to identify record harvesting for HathiTrust and other record sets. GREEN LIGHT to explore idea. Cornell has started and Columbia is very interested.
4. To make a joint data map/dictionary of terms and MARC fields used in conjunction with record identifications for extracts between the two CULs. GREEN LIGHT. This is essential for integration.
5. Work with other 2CUL TSI groups in areas of functional overlap to coordinate phase II efforts. GREEN LIGHT to explore idea

## Cataloging & Metadata : Copy Cataloging -- Review of Recommendations, Ideas, and Suggestions

1. Possible documentation sharing especially related to RDA training for copy catalogers GREEN LIGHT to explore idea. Documentation must be portable.
2. Collaboration on general training of copy catalogers GREEN LIGHT to explore idea
3. Assessing impact of specific areas of 2CUL collection development integration on copy cataloging workflows and practices at both institutions RED LIGHT: requires further discussion to determine who should own this issue. Fold into larger issue.
4. Possible consolidation of the efforts of the 2CUL copy cataloging working group with either 2CUL original cataloging working group or the 2CUL receiving working group GREEN LIGHT to explore idea. Just original. A subset of the combined group will focus on copy.
5. Plan for the Columbia 2CUL copy cataloging group to visit Cornell in the fall of 2013 RED LIGHT.