CZ and CZMG – Past, Present, Future

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Agenda

- Community Zone Vision

- History of Community/Ex Libris Collaboration

- Current State of CZMG

- Working with the CZMG & Content WG

- Challenges with the Community Zone

- Community Zone Projects (Past, Current, Ongoing)

- Training Possibilities

ExLibris

ExLibris
Content Operations

CONTENT VISION

Provide best in class content services to academic libraries and content providers

ALMA CZ VISION

Provide a centralized comprehensive platform focused on electronic resource offerings, leveraging community cataloging and knowledge

ExLibris

Community Catalog Guidelines

- Contribution of records
- Rights & responsibilities of community catalog members
- Rights & responsibilities of Ex Libris
- Management of Community Catalog

"It is our expectation that a sub-group of users will be nominated and/or elected by the Alma community to serve as individuals responsible for the oversight …"

-- Ex Libris – Community Catalog Guidelines, Nov. 2011, v9

And that led to …

Community Zone Advisory Group
Circa 2013

- Formed to provide advice and feedback to Ex Libris to allow definition of a common set of expectations for libraries in working with data in the Alma Community Zone
  - Core and full advisory group
  - Data model, contribution, workflows, licensing implications to be covered
- Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities (Ex Libris, 2014)

Community Zone Management Group
Circa 2015

- Establish plan for analyzing batch-loaded records from vendors or other sources, e.g. CONSER to determine merge rules, likely on a field-by-field basis, including determination of primary source for correction, i.e. in the CZ or other sourcing such as CONSER

- Explore possibility of working with publishers "upstream" for delivering fuller and better quality metadata.

- Establish editing guidelines for community catalog records that will adjust and expand the standards in the initial Alma Community Catalog Document. Serve as a resource for the Alma community to address misunderstandings or disagreements regarding the editing of Community Zone (CZ) metadata.

- Establish communication channel with Alma users and between users and Ex Libris, particularly in the event of the addition of incorrect data to the CZ.

- Advise Ex Libris on matters concerning authority records and functionality in the CZ and beyond.

- Initiate a system to suggest specific improvements and adjustments to Ex Libris on a formal, regular basis and work closely with Ex Libris on planning improvements and changes to the community zone

Group Members

- Steven C. Shadle, University of Washington (US)

- Stacie Traill, University of Minnesota (US)

- Jane Daniels, Cardiff Metropolitan University (UK)

- Ebe Kartus, University of New England (Australia), chair

- Galen Jones, The Open University (UK)

- Ann Fath, Getty Research Institute (US)

- Marina Kolach, University of Haifa (Israel)

- John Butera, Swinburne University (Australia)

- Lachlan Young, University of South Australia

- Mary Grenci, University of Oregon (US)

- Unni Knutsen, University of Oslo (Norway)

- Allison Powers, Harvard University (US)

Community Zone Management Group

- Functionality of the Community Zone

- Contribution by the community

- Metadata improvement, standards, merge rules, etc.
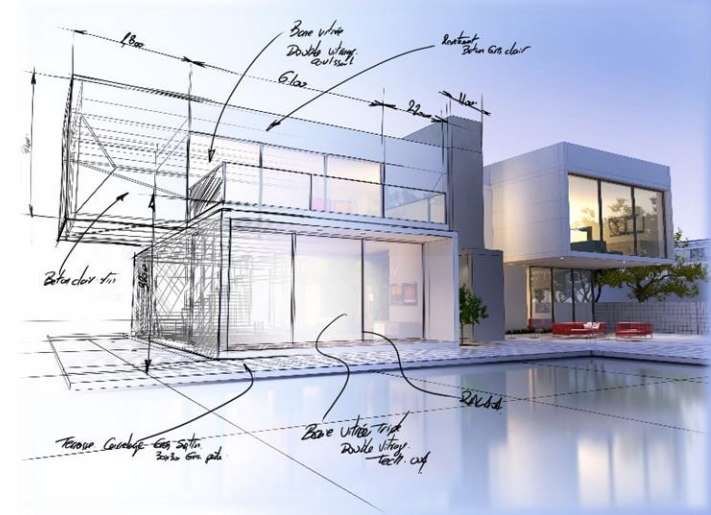
- Authority vocabularies

Content Working Group

- Engages in activities on behalf of the Alma, SFX, Intota/360Link, Primo and Summon user communities, that support the development, management and quality of the CONTENT that underlies these products

- Provide input on resource/content types and other content changes

- Press vendors to provide metadata for new collections or better metadata for existing collections

- Convey community input to Ex Libris & assist them in communicating with communities
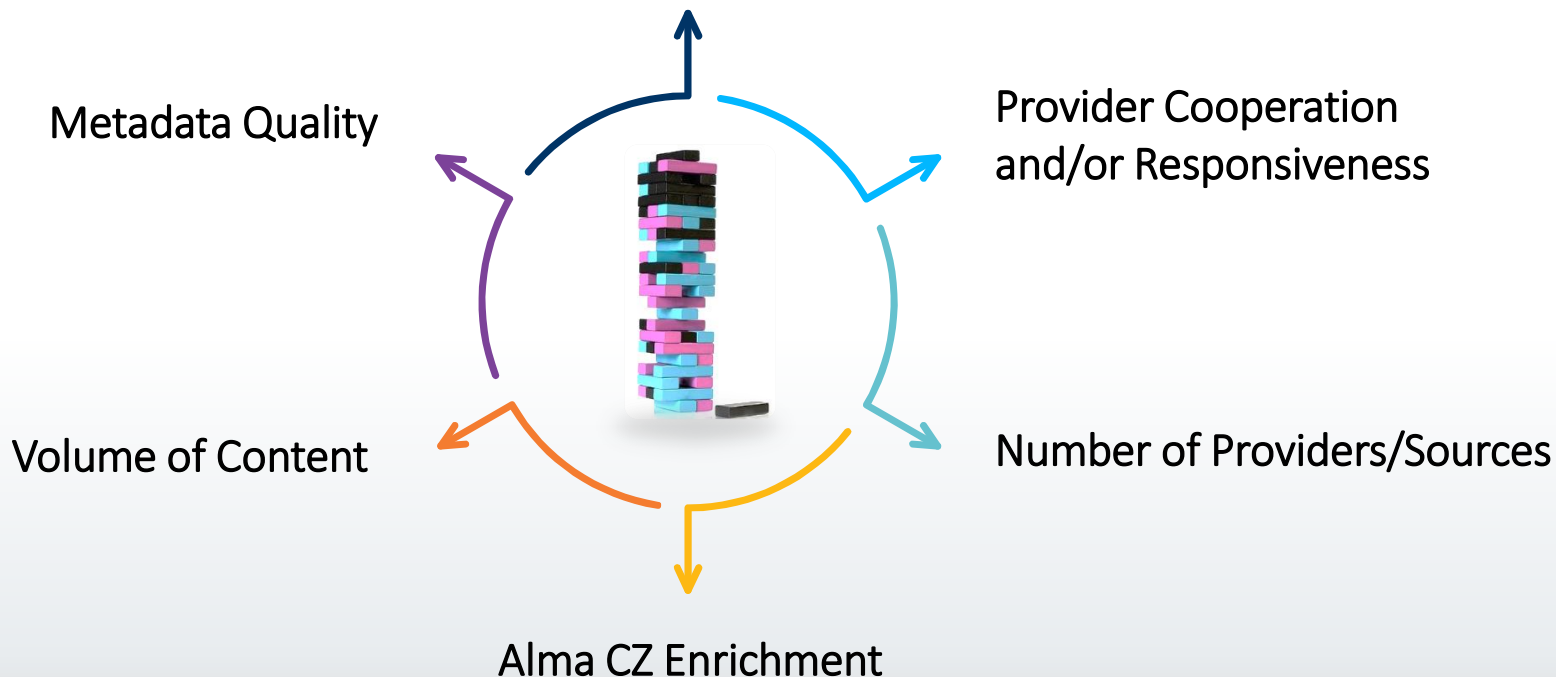
Ex Libris Working with CZMG

- Bi-monthly meetings (previously monthly)
- Open Basecamp forum for ongoing discussions
- Channel for communication
- Advice and insight to librarian perspective
- Utilize contacts with providers/vendors

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Content Operations CZ Challenges

Single catalog for global and regional purposes

Metadata Quality

Provider Cooperation and/or Responsiveness

Volume of Content

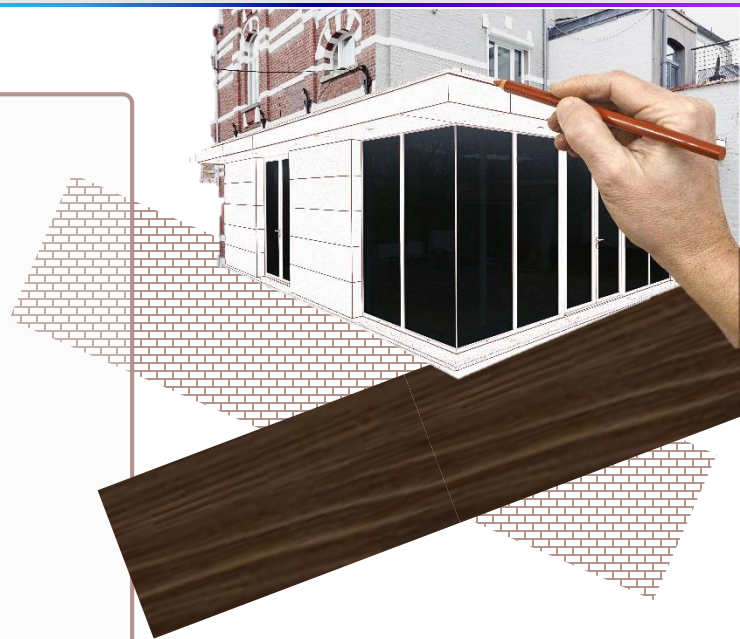Number of Providers/Sources

Alma CZ Enrichment

ExLibris

Past Projects – Collaboration Highlights

- Standardizing catalog
- Enhancing record relations
- Updating Ebook Central
- Adding IDRef (French authorities)
- Reloading GND authorities

ExLibris

- Enrichment projects
  - Bibliographic records with no identifiers

- **Converting print records to electronic**

- Improving speed of content ingestion

- Improving ownership mechanism

Enrichment

BOOKS

- Ebook Central
- Cambridge University Press
- Oxford University Press
- IOP (Institute of Physics)
- SpringerLink
- SAGE
- Cairn
- Project Muse
- Harvard
- VLeBooks
- IEEE
- ACLS Humanities e-Book
- Edward Elgar Publishing
- SIAM
- CasaliniLibri
- ProQuest

SERIALS

- CONSER
- EZB

IN PROGRESS

- Duke University Press

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Content Sources

WHERE CONTENT COMES FROM

- Annual collections
- New collections
- Providers/vendors
- Idea Exchange
- NERS
- Institutions
- …and more

WHERE DO WE START?

- Impact
- Reach
- Regional representation
- Significant content (academic, progressive, open access, etc.)

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Training Possibilities 1

- CZ Workflows

- Acquisitions right through to Discovery

- Choices with regard to sourcing records for discovery & linking

- How is the portfolio affected

- Timescales for processes that records go through depending on whether we have elected to:
  - Import records from publishers
  - Copy & edit a CZ record into our IZ
  - Edited a CZ record and contributed it back to the Community
  - Contributing records to the CZ – standalone to existing collections – your own or miscellaneous
  - CZ record enrichment – add ability to view versions of records & produce documentation describing the initial and subsequent enrichment processes.

Training Possibilities 2

- CZ Updates Task List
  - What it is
  - How to manage it
  - Implications of not managing it

"HOME WASN'T BUILT IN A DAY"

- Jane Sherwood Ace

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Thank You