



A regional affiliate of ALCTS

ANNOUNCING

**POTOMAC TECHNICAL PROCESSING LIBRARIANS
94th ANNUAL MEETING**

**TELLING THE TECHNICAL SERVICES STORY: USING ASSESSMENT & DATA
VISUALIZATION TO SHOW OUR VALUE**

Friday, October 12, 2018

9:00am-3:30pm

Washington College of Law
Claudio Grossman Hall
4300 Nebraska Ave. NW
Washington, D.C. 20016

Washington College of Law & Pence Law Library are delighted to host this meeting and are grateful for the important work of PTPL.

Speakers

Advocating for Technical Services through Assessment

Rebecca Mugridge, Keynote Speaker
University at Albany, SUNY

Visualization as Sensemaking, or, Seeing the Forest and the Trees

Gina Solares
University of San Francisco

We Rate Cats: How and Why We Assess Our Cataloging

Jessica Schomberg
Minnesota State University, Mankato

Reinventing the Cataloging Hold: Smarter Processing Through Data Integration

Nina Servizzi
New York University

For registration and other conference information, visit the PTPL website:

<https://www.potomactechlibrarians.org/event-2976335>

PTPL 94th Annual Meeting Schedule

- 09:00 - 09:50 Registration and Continental Breakfast
09:50 - 09:55 Welcome - Billie Jo Kaufman, Associate Dean for Library and Information Resources, Washington College of Law
09:55 - 10:00 Welcome and Speaker Introduction - Lynda Aldana, PTPL Chair
10:00 - 11:00 Keynote Presentation - Rebecca Mugridge (including 15 min. Q&A)
11:00 - 12:00 Visualization as Sensemaking, or, Seeing the Forest and the Trees - Gina Solares (including 15 min. Q&A)
12:00 - 01:00 Lunch
01:00 - 01:30 Business Meeting
01:30 - 02:30 We Rate Cats: How and Why We Assess Our Cataloging - Jessica Schomberg (including 15 min. Q&A)
02:30 - 02:45 Break
02:45 - 03:45 Reinventing the Cataloging Hold: Smarter Processing Through Data Integration - Nina Servizzi (including 15 min. Q&A)
03:45 - 04:00 Historical Moment and Passing of the Gavel

Registration fee includes PTPL membership, conference, continental breakfast, and lunch.

WiFi will be available.

Links for Directions, Transportation, and Local Information:

<https://www.wcl.american.edu/here/our-campus/visit/>

Washington College of Law is only a few blocks from the Tenleytown/AU Metro Station on the Metro Red Line.

Visitor parking information:

WCL has kindly offered the following code to be entered for 50% off parking if you choose to park in the law school garage at 4300 Nebraska Ave. NW--use code 817055.

Hotel recommendations:

<https://www.wcl.american.edu/here/our-campus/visit/lodging/>

Name Tags

Pre-printed name tags are available at the entrance to the conference area. Please let us know if there are any errors with your name tag. We ask that you return your name tag to us as you leave the meeting so that the plastic holders might be recycled.

**PTPL Advisory Board
Slate of Candidates for 2018/2020 Term**

Chair-Elect, Kimberly Edwards

I am the Information Analyst for Technical Services at George Mason University Libraries in Fairfax, Virginia. Prior to this position I've worked in various technical services and cataloging roles in a mix of federal, state, and college libraries. I've always had a soft spot for PTPL – it was the first library association I joined when moving to the area in 2006 and the PTPL meeting that fall was the first chance I had to meet other technical services librarians in the region. I was so excited to see that there was an entire group that existed just to discuss the aspects of the profession that interested me the most! I have served as one of the Virginia Representatives to PTPL since 2016, and have only become more impressed by PTPL during the past two years. I would be honored to serve as Chair-Elect and to continue to work to support our local libraries and the group as a whole.

Treasurer, Linda Wirth

I have an unusual background for a cataloger having started out in reference in public libraries. But now my employment background is 95% cataloging. My varied cataloging experience has been in law firms, academic libraries, government libraries, corporate libraries, and with an automated cataloging system developer. My first PTPL meeting was in 2003 and I was so impressed I joined the Board as Treasurer in 2004. I'm now retired but continue with PTPL as serving is a rewarding and sometimes even fun experience.

Maryland representative, Caroline Saccucci

Caroline Saccucci is the Program Manager and Section Head of the Cataloging in Publication (CIP) and Dewey Section in the U.S. Programs, Law, and Literature Division, Acquisitions and Bibliographic Access Directorate, Library of Congress. Prior to her appointment as a section head in 2012, she was a CIP Program Specialist and a cataloger in the Geography, Education, and Political Science Section of the U.S. General Division. She was the chair of the ALCTS Public Libraries Technical Services Interest Group (2014-2016) and serves as a member of the ALCTS Cataloging of Children's Material Committee. She was appointed to the ALCTS Leadership Development Committee (2018-2020). She is the CIP and Dewey Liaison to the ALCTS CaMMS Subject Analysis Committee and the LC representative to the Dewey Decimal Classification Editorial Policy Committee. She is a member of the IFLA Standing Committee on Subject Access and Analysis. She has co-written articles published by Cataloging and Classification Quarterly and Library Resources & Technical Services and is the author of a column in a forthcoming issue of Against the Grain. She has a B.A. in history from Longwood University and an MLS from Simmons College.

Virginia representative, Meghan Burke

My name is Meghan Burke. I am the Metadata/Electronic Resources Librarian at Marymount University. I am running for a position as a Virginia representative on the Advisory Board because I am interested in helping to provide technical services librarians in the DC, Maryland, Virginia region with professional development and networking opportunities. Additionally, as

someone reasonably new to the profession, I am looking to make connections with other professionals in the area, and take on new leadership roles.

D.C. representative, Mimi Games

Mimi has worked in the Technical Services Department of the Pence Law Library of the Washington College of Law for nearly 13 years. Her career includes experiences in university, state and federal libraries both in the US and overseas. Her current duties at WCL include cataloging monographs and serials of all formats, physical processing of print monographs and serials, assisting in the maintenance, consistency and integrity of metadata in the online catalog. Mimi has also worked in acquisitions, reference and circulation. She speaks fluent Italian and is conversant in ASL. She has been a PTPL Advisory Board member since 2009 and acted as Board Chair from 2013-2014.

Current PTPL Advisory Board

Chair
Lynda Aldana
University of Maryland,
Baltimore County

Executive Committee
Chair-Elect
Vera Clyburn
Library of Congress

Past-Chair
Karl Debus-López
Library of Congress

Treasurer (2016-2018)
Linda Wirth

Secretary (2017-2019)
Aimee Plaisance
University of Maryland,
Baltimore County

Washington, D.C.
Christine K. Dulaney (2017-
2019)
American University

Regional Representatives
Virginia
Mei Kiu Lo
(2017-2019)
University of Richmond

Maryland
LaDonna Pierce
(2017-2019)
Johns Hopkins University

Mimi Games (2016-2018)
American University
Washington College of Law

Kimberley Edwards
(2016-2018)
George Mason University

Joyce Tenney
(2016-2018)

Speaker Biographies and Presentation Information

Rebecca Mugridge

Advocating for Technical Services through Assessment

Program description:

The assessment of technical services activities is often overlooked even though they have a great impact on the success of the library in serving its users. This presentation addresses a variety of qualitative assessment activities that can be useful in any technical services operation, large or small, and suggests ways in which assessment results can be used to advocate for technical services.

Brief bio:

Rebecca L. Mugridge is Dean of University Libraries at the University at Albany, State University of New York. Prior to this she was Associate Director for Technical Services and Library Systems. Her research interests include assessment, process improvement, and library management, primarily but not exclusively in technical services and information technology. She has held positions at the Pennsylvania State University, Yale University, Robert Morris University, and the University of Pittsburgh. Rebecca has a BA in history from Penn State, an MLS from the University of Pittsburgh, and an MBA from Robert Morris University.

Gina Solares

Visualization as Sensemaking, or, Seeing the Forest and the Trees

Program description:

Efforts to demonstrate the value of technical services often lead to complicated descriptions of complex workflows and systems. At Gleeson Library, staff used a free online diagramming software to create a visual chart of acquisitions, cataloging, and systems infrastructure. Through this process, staff were able to clarify internal communications, highlight work dependencies, and justify budgetary needs. Creating even simple visualizations of technical services infrastructure can provide opportunities for organizational sensemaking and can be used to illustrate the stories we tell about our work.

Brief bio:

Gina Solares is currently the Head of Cataloging and Metadata Management and the Interim Head of Library Systems at the University of San Francisco's Gleeson Library|Geschke Center.

Jessica Schomberg

We Rate Cats: How and Why We Assess Our Cataloging

Program description:

This session will review methods and tools catalogers use to assess our work, based on published literature. As part of this, we will discuss how to choose methods or tools appropriate to your goals. We'll conclude by discussing how our assessment decisions can support our professional and institutional values.

Brief bio:

Jessica Schomberg became interested in cataloging in high school, after arguing with the public library cataloger about where the science fiction should be shelved. Jessica currently serves as the Media Cataloger and as the Library Services Department Chair at Minnesota State University, Mankato. Jessica's educational background includes a MA in English: Teaching English as a Second Language from Minnesota State University, Mankato, and a MLIS from the University of Washington, Seattle.

Nina Servizzi

Reinventing the Cataloging Hold: Smarter Processing Through Data Integration

Program description:

The need to address a rapidly growing cataloging backlog caused NYU Libraries to assess long standing workflows based on first in, first out processing queues. An analysis of statistical data within the technical service department identified several inefficiencies in the acquisitions-to-cataloging processing stream. Using the Libraries' data warehouse to integrate local acquisitions and holdings data with bibliographic data from OCLC, new automated processes have been created to identify full cataloging as it becomes available, automatically overlay brief bibliographic records, and create pull list for items that can be removed from the cataloging hold. By improving the management of the hold, the new processes have increased cataloging resources available to meet the Libraries' original cataloging needs.

Brief bio:

Nina Servizzi is currently Associate Dean, Knowledge Access and Resource Management Services for the Division of Libraries, New York University, where she is responsible for technical services and data integration and analysis. She has been deeply involved in defining functional specifications for the Libraries' Data Warehouse since the project's inception and oversees the team responsible for its design and development.

Scholarship Recipients

Ivy Donnell

Ms. Donnell is enrolled in the Master of Library and Information Science program with a specialty of Archives and Digital Curation at the University of Maryland. Currently, she is employed as a Motion Picture Preservation Technician at the National Archives and Records Administration. She has also worked at Colorlab in Rockville, Maryland where Ms. Donnell managed preservation projects for a variety of institutions with moving image collections. Ms. Donnell is interested in enhancing her expertise in the field of moving image archives.

Jamileh Kouhestani

As an experienced librarian, Ms. Kouhestani has been working in technical services in various libraries in Iran since 1993. Although she completed her library degree at Ferdowsi University in Iran, Ms. Kouhestani is enrolled at Catholic University's MLIS program. Currently, she is employed as a Library Technician II at the Community College of Baltimore County. Although she has worked in various technical services areas, her passion is for cataloging and the creativity required to create data which enables discoverability by users.



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Business Meeting Agenda

1. Opening of Meeting
2. Approval of 2017 Annual Meeting Minutes
3. Treasurer's Report
4. Presentation of Academic Scholarships
5. Election of New Advisory Council Officers
6. Call for Archival Material--Particularly 2003-Present
7. New Business
8. Adjournment



PTPL 93rd ANNUAL MEETING

October 20, 2017

Hilda and Michael Bogomolny Room

UB Student Center

University of Baltimore

1420 N. Charles St.

Baltimore, MD 21201

Minutes - Draft

The 93rd annual meeting of the Potomac Technical Processing Librarians (PTPL), "Discovery & The Now Generation ILS: The Next Generation is Here!" was held at the University of Baltimore, Baltimore, Maryland. Registration began at 9:00 a.m. accompanied by a continental breakfast. The program commenced at 9:55 a.m. with a welcome from PTPL Chair, Karl Debus-López. He introduced and thanked the PTPL Board and Bobby Reeves, PTPL's webmaster. Karl then introduced the keynote speaker Peter McCracken, Electronic Resources Librarian, Cornell University.

The (Actual) Next Generation ILSs

Speaker: Peter McCracken

Speaker Bio:

Peter McCracken is Electronic Resources Librarian at Cornell University, a position he has held since June, 2016. Before starting the Serials Solutions company with his brothers and a friend in 2000, Peter worked as a Reference Librarian at East Carolina University and at the University of Washington. An additional area of interest was initiated in 2009 when Peter started ShipIndex.org, a site that helps researchers, genealogists, and the curious learn more about the nautical vessels that interest them. At Cornell, he establishes and maintains access to electronic resources, and has been a member of the FOLIO Resource Management Special Interest Group for the past year. Peter holds a BA in English from Oberlin College, an MSLS from UNC-Chapel Hill, and an MA in Maritime History from East Carolina University.

Presentation:

Cornell University has determined that FOLIO will be their next generation system and strongly supports this effort which it believes will revolutionize libraries with its capacity to ingest everything from handwritten card catalog records, computerized records, digitized objects, to institutional repository content. In this era when libraries are moving to the next-generation web discovery tools, McCracken presented retrospective data on the rate of technological change,

for when academic libraries adopted new integrated library system (ILS) systems. He showed there was a strong pattern of adoption in 1995-2005 and a second uptick 2011-2017. The evidence suggests PTPL institutions likely had a stagnant system change between 2004 and 2010. However, there is evidence of a current wave of new technology adoption. ProQuest has announced their company will have 1,000 installations of Alma within the next couple of years. Meanwhile, ARL indicates there are only 56 institutions which have not adopted or plan to adopt a next generation system.

Cornell determined that FOLIO, an acronym for “Future of Library is Open,” appealed to their institution, not as a consumer product/service, but due to the community built nature of the project. As a point of clarification, open source software, developed by community members, rather than a commercial product, can mistakenly be seen as ‘free of cost.’ McCracken emphasized that FOLIO is “free like a free puppy, not like free beer.” As an open source product, FOLIO is not a proprietary product, in contrast to the widely adopted Alma system, where institutions rely on the sole service provider, ExLibris. Weighing the pros and cons of the market’s few proprietary products, Cornell’s decision to support open source software was a proactive stance to guard against the historical obsolescence of systems that failed to keep pace with libraries’ changing needs over time.

Cornell has committed significant librarian resources to the community of development organized under the Open Library Foundation (OLF) which receives substantial involvement from EBSCO, including help from designers and developers as well as several libraries from a variety of countries. About a dozen special interest groups (SIGs), have a robust 14-year archive of their regular and open meetings that range in functional areas from metadata management, resource access, to consortia. To illustrate the unique work being accomplished by OLF, for a more global community of information, a computer code was produced for Middle Eastern resources accommodate reading structure from right to left; international currency symbols are now available, both to the left and right of a decimal; as well as extensive work for compliance with privacy issues which will be mandated by law in the European Union.

FOLIO is not currently available for implementation, but Cornell has made a significant investment in this project for its future potential. For instance, a significant investment of human resources has been dedication to staffing commitments, including the Dean residing on Product Council and several librarians chairing SIGs, as well as internal meetings held twice monthly on campus. Other institutions are also investing, as evidenced by Duke University, another participating institution. A recent job advertisement from Duke signaled their hiring investment for the multiple developers needed for the FOLIO project.

Unique to open source software development is the factor that there is no financial business commitment from any major party. Librarians currently contribute their time and expertise under the dual burden of their original job responsibilities and FOLIO falling under “other duties as assigned.” These extracurricular duties are coordinated by EBSCO, which has a tangential business interest and sees a need to interject competition into this miniscule market. One issue facing this community building effort is uncertainty regarding EBSCO’s business plan for

ongoing support. That said, Cornell perceives “community” as the important factor for adopting FOLIO, both as a driver of platform innovation in the marketplace, but must balance the human resources cost for a project with no bottom line or Return on Investment (ROI).

FOLIO is not a front-end discovery system and there are no current plans to design a companion product. Current thought suggests the use of BlackLight or TINT.

Following McCracken’s presentation, questions from the annual meeting participants focused on a post FOLIO launch. Although the group expressed appreciation for the dynamic system development, small institutions would be unable to make internal human resource commitments at the same level as Cornell or Duke. McCracken explained that one potential path for institutions not currently involved in development, but would like to consider FOLIO implementation, might be that a new market of library service developers provides a supporting role to FOLIO adopters. Using a system of proprietary outsourcing for support from business such as EBSCO or SirsiDynix, might serve as a solution to install and/or maintain a more developed system. If institutions adopted FOLIO from the point of a community launch, it would be comparable to ProQuest Alma using a contracted administrator. Then, the technology assessment would shift to a comparison between a commercial product/service versus an open source product, and re-focus discussion on differences in functional solutions offered by FOLIO versus Alma. The overwhelming benefit to open source development is offering this as a solution for ongoing customization and flexible response to changing needs following the system adoption. FOLIO has the product potential to deflect the stagnant era libraries experienced under the Voyager legacy system where commercially managed products prevented customers from addressing emerging needs and problems.

A second question asked for more information about FOLIO’s accommodation of linked data. Although McCracken is not involved in the Metadata Management SIG, he could confirm that the codex is being examined under the lens of BIBFRAME.

What Should an ILS Do When Everything Continues to Change?

Speaker: Penny Lochner

Speaker Bio:

Penny Lochner is Head of Collection Resources Management and the Serials & Electronic Resources Librarian at Muhlenberg College (Allentown, Pa.). Penny earned her M.L.S. from Rutgers University (1999-2000). Her perspective on information management, access, and use draws on experience as a legislative researcher and analyst in Washington, D.C., a catalog and web data manager for an STM publisher, a reference librarian, a publisher relations librarian at a subscription agency, and her current role in a liberal arts college library. Her research interests include the value of academic library collections and information discovery.

Presentation:

Modern day library collections issues create new factors to manage in a dynamic environment. In a historical period when the Library acquired primarily print or physical resources, the status of the library's resources ownership was a steady variable. Now, new characteristics arise based on acquisition by access versus ownership. Online resources present a challenge to manage the stability, continuity, and quality of title lists. Resource providers offer increasingly varied and complex acquisition models which are continually evolving. Scholarly communication is broadening to open access and hybrid journals. And the Library has an obligation of stewardship for digitization, tracking perpetual access/licensed content and recording the institutional scholarly record.

Lochner's shared her experience at Trexler Library to bears witness to these complex collection management issues and how the new system has impacted their institution. To set the stage, she explained that the library is part of Muhlenberg College, a relatively small 4-year undergraduate liberal arts institution with a student population of 2,408 full-time enrollment (FTE). Library staff includes the Director, 7 full-time (FT) librarians, 2 FT paraprofessional managers, 6 FT and 1 part-time (PT) staff associates, and 46 student workers. Trexler Library has seen library management system upgrades every 10 years, although search/discovery enhancements were developed much more rapidly with 3 systems in 7 years. In 2015 the Library implemented OCLC WorldShare Management Services (WMS) together with WorldShare Discovery, augmenting the 2012 implementation of WorldCat Local. The Institutional holdings which would be managed in this new system included 1.25 million titles, 360,341 which were physical items within the library and 896,078 online resources. Some of the formats included books, journals, films, music scores, maps, databases, images, and kits. This upgrade came during a time when the staff was overwhelmed by the fast growth in library holdings, wider variety of resources, and cataloging at a more granular level than previously. By the completion of the upgrade, the new system would replace the legacy software modules for circulation, interlibrary loan, acquisitions, cataloging, and inventory. Also, up to this time, a campus-wide accounting system had not been implemented, but now there was potential to integrate financial data within the new system.

By migrating to a new system, Trexler Library desired to see improvements that would encompass both public and technical services. The library's top goal was to offer users a more comprehensive discovery experience. Behind the scenes, it was hoped that system workflow efficiencies would result in freeing staff for other projects, streamlining all formats on a single system, providing open platform support to develop customized application programming interface (APIs), and benefit from ongoing library community development to manage operations.

WorldShare improved user experience by simplifying multiple systems/interfaces into a single search encompassing all resources and formats. WorldShare also offered alternative options for more directed search in a straight forward interface. From the implementation side of the system, there was an immediate reduction in redundant data entry and added value in access management from the integration of license acquisition data. Data integrity dramatically

improved with the reconciliation of local records against WorldCat. Furthermore, the system's ability to collate multiple formats into a single search result and combine data on resource location, circulation, and interlibrary loan sharing, in a unified system lead to beneficial data reporting.

WorldShare workflows changed Trexler Library's from isolated institutional transactions into more broadly acting in concert with the larger library community. The system eliminated MARC record loading, unified electronic resources acquisitions through the knowledge base, and extended resource assessment capabilities using overlap analysis for acquisition models such as PDA/EBA and subscription analysis. Access to this unified data also improved collection projects such as missing items evaluation and replacement, VHS to DVD evaluation, as well as ordering and withdrawals. Accounts payable processes have greater flexibility, the system is nimbler in ability to evaluate and facilitates consortia collection development. The cloud-based environment supports a system of continuous improvement.

Job roles and coordinated workflows discovered both positive and negative impacts from the transition. Collective management with the library community supports discovery and has been of great benefit. However, local customization or unique collections prove challenging to develop and this is a disadvantage from the prior ILS. On the other hand, improving the findability of e-books has decreased the need for physical book expenditures, so one negative was directly offset by the upgrade. Automation and streaming of data at the granular level frees human resources to refocus on improving collection and monetary stewardship, discovery and user behavior. The new ILS supports some types of assessment and reporting that improve management techniques, but metadata does not always match the situation under review, so flexibility is limited. However, in the overall evaluation, e-book use has exploded and there is significant increase in journal title use, along with increased use of Google Scholar. This speaks directly to the library's top goal to improve user experience. The bottom line is that patrons are finding and using a greater percentage of the electronic collection than under the old system.

Questions from the PTPL audience participants pertained to the significant increase in e-books and the comparison of staffing responsibilities before and after WorldShare. Lochner explained that since the transition significantly reduced government document work, it opened an opportunity to move one-half position to cataloging. There is an OCLC enhanced records community, so Trexler Library participation requires a commitment to this effort. Another change in duties that most interested meeting participants was that full-time catalogers now need to devote time to building the library community. Regarding increased e-book engagement, the resulting usage data empowered the library to share statistics that convinced faculty that the electronic format has become desirable for users. It also supported evidence of the decline of print reference sources, opening opportunity for a reference to e-book conversion project.

Alma: A Different Type of ILS

Speaker: Mike Rogers

Speaker Bio:

As an English major fresh out of college Mike Rogers started working as copy cataloger at the UT Library in 1992. After five years, he moved to the Serials Department configuring algorithms for journal prediction patterns. This work evolved into a desktop support position followed by ILS administration. He has worked at the University of Tennessee for 25 years and manages the Enterprise Systems Team.

Presentation:

By a show of hands from the conference audience, a significant portion of attendees have or intend to migrate to Alma. Rogers set the stage with a sentiment well-known in academic libraries that summarizes their “big picture” challenge, “The worst library system we’ve ever had is the one we’re on, and the best library system we’ve ever had is the one we just left.” In summary, systems have not encompassed rapid change in the library industry. Business practices have advanced so rapidly it can be difficult to determine whether vulnerability stems from early system adoption or floundering with an obsolete system until bugs are worked out of new systems. UT suffered common system challenges including associated information housed in several systems that could not interact. Over time, there were fewer staff employed by the library. And slowly, as technology advanced, there had been multiple system migrations over a 6-8 year span. Eventually, the decision to adopt a web-scale discovery system came under new library leadership and represented fulfilling the goal to increase workflow efficiencies as well as move to cloud hosting.

The Alma migration, which Rogers described as a maelstrom event, incorporated the replacement of three major discrete systems: Aleph, SFX, and Primo. Although UT was already using the Primo discovery system, the Alma migration required a re-implementation of this system from scratch. The six-month migration was implemented in close support with the ExLibris migration team. As UT was an “early adopter,” there was an added level of complexity that encompassed development testing, followed by lag time so program developers could reprogram the necessary revisions and provide subsequent configuration training. Following the vendor’s lead in migration, there is an abrupt transition to institutional self-reliance with the added responsible for all internal training. In retrospect, the best advice Rogers could give other institutions facing this process is to view implementation as a marathon, rather than a sprint. Significant data cleaning was a factor both before and after the implementation, so when viewed as a sprint to the end, this process seemed unending if seen solely as a pre-migration activity.

Alma has delivered several advantages for the UT library. The cloud-based system has greatly improved uptime and reduced unexpected or long-lasting downtime experiences. The interface performs well with multiple browsers, is tablet-capable, and permits availability of apps for limited functionality. The goal of achieving a more integrated workflow has been realized. Cataloging, record management, and loading maintain powerful support through normalization rules, data cleanup assistance, automation, and community-driven data. The integration

improves functionality between the ILS and discovery layers. A bonus is Alma's incorporation of analytics tools which provides a locally distributed system of reporting and the capability for institutions to share reports.

Rogers also assessed migration disadvantages. Project estimates were significantly understated and work lasted beyond the designated six-month migration period. The cloud based Alma no longer offers the traditional back-end access to the library's data so there is a learning curve for new methods of operation. Aggregating and testing data is no longer a local process. That said, having a real-time system with cloud access opens up the potential for other systems to integrate with this data, automating work that formerly relied on redundancy. Noting that libraries serve a larger institution, the ability to configure third-party systems such as patron data, accounts payable systems, and identification services is a technological leap forward for efficiency. Unfortunately, ExLibris customers bear the onus to configure systems and collaborate interdepartmentally to achieve this automation. It is a steep learning curve for employees who will perform this task only one time without prior experience. The vendor no longer has a support role, so a great responsibility is placed on libraries to learn and implement integration. Additionally, Alma is a subscription service that bases its billing on the number of faculty/staff using Alma. So, with its increased functionality, it also becomes a system with a wider audience, when compared with previous legacy systems.

There are several challenges with the new Alma system. First, obtaining access to library resources has been hindered with data migration problems. On the backside of the system, it is often difficult to comprehend the philosophy behind the Alma workflows, particularly acquisitions and ordering. Additionally, the new product has an excessively high volume of communication pushed out by ExLibris. Since Alma is a highly integrated system, covering vast functionality both inside and outside the library, the breadth of issues is vast, ranging from technological operability, library communities of practice, and the publishing world as a whole. The result of this massive communication effort is an exorbitant amount of details. Librarians must continually monitor the company's system development, measuring impact of change institutionally, within the broader library, as well as vendor communities. Although libraries are staffed in a multitude of differing configurations, ultimately the outflow of information from ExLibris is difficult to parse to individuals, so its likely one gatekeeper who bears the brunt of this burden.

In summary, Alma has great potential as a system for the "long term" due to its sustainable architecture, ability to keep pace with rapidly changing technology, and usefulness across the entire library spectrum, not just technical services and circulation. However, Alma could still improve the ease of use for staff, improve efficiencies in communication, particularly involving system architecture. Currently nine library institutions are participating with ExLibris in a user experience project focusing on Alma interface usability. So far, this work on functionality appears dormant, at least from UT's perspective.

Questions from annual meeting participants were particularly pointed as all of the attendees from the Washington Research Library Consortium face imminent migration to Alma. Participants expressed interest in learning more about the APIs available for data and select

services. Further inquiries regarded the need to re-implement Primo with the new installation of Alma. Confirmation of the downtime record was revisited, particularly regarding the single exception lasting six hours. Participants expressed interest in the analytics services and asked whether it met all needs. Rogers indicated the knowledgebase has alternatives for extracting data in ways that can be combined with some external programming efforts that has resulted in satisfactory outcome for UT.

The group also discussed the role as a pilot institution for ExLibris to test out new products on libraries during installation. Currently ExLibris is seeking volunteers for Primo-VE and Alma UX. Attendees from the Washington Research Library Consortium were interested in pros and cons of this role. Finally, discussion circulated around the issue of how receptive the Alma system was to ingesting data from silos such as LibGuides, institutional repositories, and electronic theses and dissertations. UT has found persistence is required with developers.

SearchWorks, Share-VDE, Yewno: The Three Faces of Discovery

Speaker: Phillip Schreur

Speaker Bio:

Philip E. Schreur is the Associate University Librarian for Technical and Access Services at Stanford University. He received his Ph.D. in medieval musicology from Stanford and an MLIS from the University of California Berkeley. His early focus was on cataloging and metadata development and, as chair of the Program for Cooperative Cataloging, he helped implement RDA within the United States. With a mid-career shift to HighWire Press, he explored the automated semantic analysis of digital text and the assignment of controlled vocabulary terms at scale. He is currently the coordinator for linked data projects for the Stanford University Libraries and the PI for a Mellon-supported grant called "Linked Data for Production," focusing on the transition of traditional Technical Services workflows to ones rooted in linked open data.

Presentation:

Schreur developed an analogy to the three discovery systems that make up the search environment for Stanford University Libraries using the 1957 classic movie, "The Three Faces of Eve." As the movie showed different facets of the core persona of the movie character, it seemed a plausible analogy to compare the traditional BlackLight based discovery system called SearchWorks, a linked-database discovery system called SHARE-VDE, and the graphical data mining discovery interface known as Yewno. This analogy underscored an important question: are these discovery systems simply three faces of traditional library data, or are they in fact three completely different personas with unique characteristics and goals? The presentation compared the three systems currently in use by the library.

SearchWorks is a BlackLight based discovery interface developed at Stanford designed to take advantage of the intense complexity of MARC data, but flexible enough to absorb more simplistic data schema and formats. It is a closed discovery system optimized to fully exploit internally created data with some relevant links to outside sources outside the institution. Over time, the Stanford libraries ingest additional types of data and these end up in the mix with

MARC records. However, it is evident that new data varieties do not perform as well in discovery, lack the complex coding of MARC and fail to map as well to the Solr indexes and facets. So overall this discovery environment with mix schemas results in an inconsistent and incomplete discovery output for non-MARC items. To summarize, SearchWorks is a discovery interface with a traditional personality, trying to keep up with the times, but showing the limits of its reach.

Next, Schreur described SHARE-Virtual Discovery Environment (SHARE-VDE) discovery interface. Casalini Libri, the system's developer, made it revolutionary in the sense that the system is based on linked data and BIBFRAME in particular. BIBFRAME, a new linked data communication format, is being spearheaded by the Library of Congress to replace MARC. As this is in the production stages, the Library of Congress has significantly advanced BIBFRAME, currently using it in various international projects. As an early adopter, SHARE-VDE in its current phase, contains 200K records from 16 institutions, converting MARC to BIBFRAME 2.0. Although it has a relatively small amount of data, its functionality works on entities such as work, author, or publisher and uses linked data as its basis. It is significant as a visionary discovery environment using linked data.

Schreur described Yewno as the newest personality, and to use the movie character analogy, is the precocious, wild, and non-traditional discovery system. Using machine-learning and computational linguistics, Yewno's unique technology analyzes high-quality content to extract concepts and discern patterns to make large volumes of information more effectively understood. This core technology drives Stanford's product portfolio and mission to transform information into knowledge. Stanford also views this system, devoid of disciplinary classification, as supporting institutional value to encourage curiosity and deeper understanding in the world.

Yewno works with full text, and although it does not "catalog the internet," it provides a solution for relating an infinite number of resources on the web together in a semantically consistent way. A second important feature of Yewno is its independence from human assigned metadata by automatically extracting concepts and discerning relationships between them. Stanford describes it as a perfect complement to full text items which the libraries could never afford to catalog and as an additional discovery layer on top of full text items by reaching down into the texts themselves to draw out concepts which broad metadata topics would never uncover.

Yewno can analyze any amount of full text made available, including open web resources, articles, material from digital repositories, and more. It semantically analyzes the full text relating similar concepts across very disparate document types and presents a graphical interface of those relationships to promote exploration of the topics in context. Yewno makes new associations between topics as well as provides full text access to the data for analysis.

In conclusion, through the three faces or systems of discovery, each offers its own advantages and disadvantages. The more traditional BlackLight fully exploits the complexity of bibliographic data curated with great effort over decades of skilled catalogers, highly attuned to users' needs, and drawn from different resources across all language families and centuries. The

disadvantage of this traditional system is its brittle dependence on text strings which limit it to the closed world of enriched library data. SHARE-VDE is relatively stable but still evolving system as it unravels concerns raised in the shift to entity-based as opposed to record-based discovery. It allows exploitation of the internal connections implied by MARC coding but leaves it unrealized by converting text strings to linkable entities. By using the same URIs for these entities that the web uses, it allows communal linking out to the richness of the Web and retrieves data crucial to patrons. The third system, Yewno, is non-traditional and focuses on the use of free text as opposed to metadata or linking through identifiers. The capacity to analyze large bodies of free text for relationships between various elements within them allows users to discover important connections that will never be linked through the use of preassigned metadata or identifiers. In sum, Stanford uses three very different personalities molded by three very different technologies to solve three very different user needs. Rather than view the current era as a time to reconcile these systems, Schreur suggests that these three distinct personalities complement each other, opening opportunity to approach complex data and research needs from multiple angles. In the future, Schreur ventures, even more personalities may develop with technological changes, each bringing its own unique light on information access and discovery.

Annual meeting attendees asked about how Stanford tests new products. Primarily Stanford libraries rely on students to help develop interface with the help of bibliographers who teach freshman for a soft roll out. Faculty members are not included in this process. Policy dictates not to disturb them, so the libraries rely heavily on graduate students who might mention it to an advisor. Another attendee inquired about the starting point for discovery, whether it started on the web, and the impact that the obvious differences between how librarians and students use the same discovery tools had on this implementation. Schreur noted that linked data is a step towards meeting on the web, noting Google does not perform semantic analysis. Yewno links to a subscribed set of data so its semantics are more exacting, however it is limited to primarily French and English language documents, so this is currently a limiting factor. Given another 10 years, things will evolve. When asked about the staffing burden for Stanford's multi-system approach, Schreur replied that there is a consolidating move with BlackLight to transition MARC to include linked data.

Business Meeting

1. Opening of Meeting

Karl Debus-López called to order at 3:15 pm. The first item of business was to acknowledge the PTPL's generous sponsorship, in part for the 2018 Annual Meeting, by the University of Baltimore's Office of the Provost.

2. Approval of 2016 Annual Meeting Minutes

The next item of business was a motion to approve the minutes from the 2016 Annual Meeting. Minutes were approved.

3. Treasurer's Report

Linda Wirth provided the Treasurer's report.

Checking account balance October 2016	\$30,809.79
Checking account balance October 2017	\$27,647.97
Scholarships	\$2,000.00
Annual Meeting 2016	
Receipts	\$10,499.14
Expenses	\$5,148.97
Annual Meeting Difference	\$5,350.17

It was noted PTPL's received financial benefit from the selection of a local workshop teacher, advisory council member Tiffany Wilson, which eliminated former costs incurred for airfare, hotel and meals. Additionally, appreciation was expressed for the generous sponsorship of this year's annual meeting by the University of Baltimore's Office of the Provost providing the venue's rental at no cost.

4. Presentation of Academic Scholarships

PTPL provides two \$1,000.00 scholarships for full or part-time students in an ALA - accredited Library and/or Information Science master's program, who demonstrate an interest in library technical services through employment, course of study, or research interests. In presentation of the awards, Karl Debus-López announced the recipients as follows:

Lisa Hilleary (unable to attend annual meeting in person)

Scholarship recipient bio:

Lisa Hilleary is a technical services professional at Williamsburg Regional Library in Williamsburg, Virginia, and teaches history at Thomas Nelson Community College. She received a Master's degree in history from Old Dominion University in 2011, and will be graduating from the University of South Carolina with her MLIS degree in May 2018. She plans to continue her career in technical services, but is looking forward to new and exciting opportunities to expand into other departments or libraries in the future.

Leigh Ann Martin (attended in person to receive her award)

Scholarship recipient bio:

Leigh Ann Martin is the Resource Description Associate for University of Richmond's Boatwright Memorial Library in Richmond, Virginia, where she manages the library's print workflow and supervises student assistant copy cataloging. She has worked in

public, academic, and corporate libraries in a variety of roles, including circulation, audio learning, administration, and reference for a small business library collection.

She is currently enrolled in University of Wisconsin Milwaukee's Masters of Library and Information Science program, where she is pursuing a double concentration in information organization and information technology, expected to be completed in May 2018.

5. Election of New Advisory Council Officers

Lynda Aldana, University of Maryland Baltimore County will serve at the new chair. Chair-elect is Vera Clyburn, Library of Congress. Karl Debus-López will serve in the capacity of Past-Chair. Aimee Plaisance, University of Maryland Baltimore County will assume the position of secretary for 2018-2019. Linda Wirth will continue to serve as treasurer. Newly elected to the advisory council is DC representative Christine K. Dulaney, American University; Maryland representative LaDonna Pierce, John Hopkins University; and Virginia Representative Mei Kiu Lo, University of Richmond.

6. Historical Moment

Mimi Games, Washington DC representative for the advisory council, and employee of American University Washington College of Law provided the 2017 Annual Meeting Historical Moment. Research for the Historical Moment was provided by Tiffany Wilson, Past-Chair. The first PTPL Annual Meeting was technically termed a "dinner rally," and was held in 1923. To provide some perspective, this year's historical moment provided a review of some of the people who were born the same year as this tradition started:

Bob Barker – television entertainer; Rose Marie – actress; Knox Martin – sculptor, painter and muralist; Bob Dole – long-time senator from Kansas and ran as Republican candidate for president; Chuck Yeager – record-breaking test pilot to break the speed of sound and decorated US Army and Air Force Veteran; Henry Kissinger – controversial German born politician who served as Secretary of State and National Security advisor for US; Glynis Johns – Welsh actress; Franco Zeffirelli – movie and television director and producer and in 2016 identified as one of 35 living people related to Leonardo DaVinci; and Liz Smith – gossip columnist known as "The Grand Dame of Dish," appearing in New York Post, New York Daily News, Newsday and Staten Island Advance, as well as variety of television appearances including Fox and Friends.

7. Call for Archival Material – Particularly 2003-Present

Mimi Games, Washington DC representative for the advisory council also serves as the organization's archivist. Catholic University generously houses all PTPL records.

8. New Business

No new business was brought before the membership.

9. Adjournment

Karl Debus-López adjourned the meeting at 3:41 pm.

Respectfully submitted,
Michelle Polchow
PTPL Secretary