

EPUG UK&I 2021 AGM

COMMUNITY ZONE MANAGEMENT GROUP UPDATE

OVERVIEW

- Membership changes, expansion plans
- Revised charge to reflect broader scope
- Updating CZ contributor guidelines documentation
- Developing additional training for CZ contributors
- Community engagement and communications

CZMG COMMUNITY MEMBERS - 2021



Galen Jones, The
Open University
(chair)



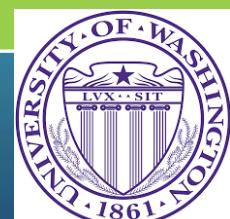
Jane Daniels,
Cardiff
Metropolitan
University



Tim Kaneshiro,
Getty Research
Institute



Stacy Magedanz,
California State
University, San
Bernardino



Steve Shadle,
University of
Washington



Stacie Traill,
University of
Minnesota

CZMG EX LIBRIS MEMBERS - 2021

Rael Elstein
Content Product
Manager

Amotz
Movshovitz
Librarian

Dahlia Wisner
Librarian



FAREWELL & THANK-YOU

Members departing

- Ebe Kartus (Australian Catholic University)
- Betsy Friesen (University of Minnesota)
- Lachlan Young (University of South Australia)
- Unni Knutsen (University of Oslo)

HOW THE CZMG ALIGNS WITH OTHER GROUPS



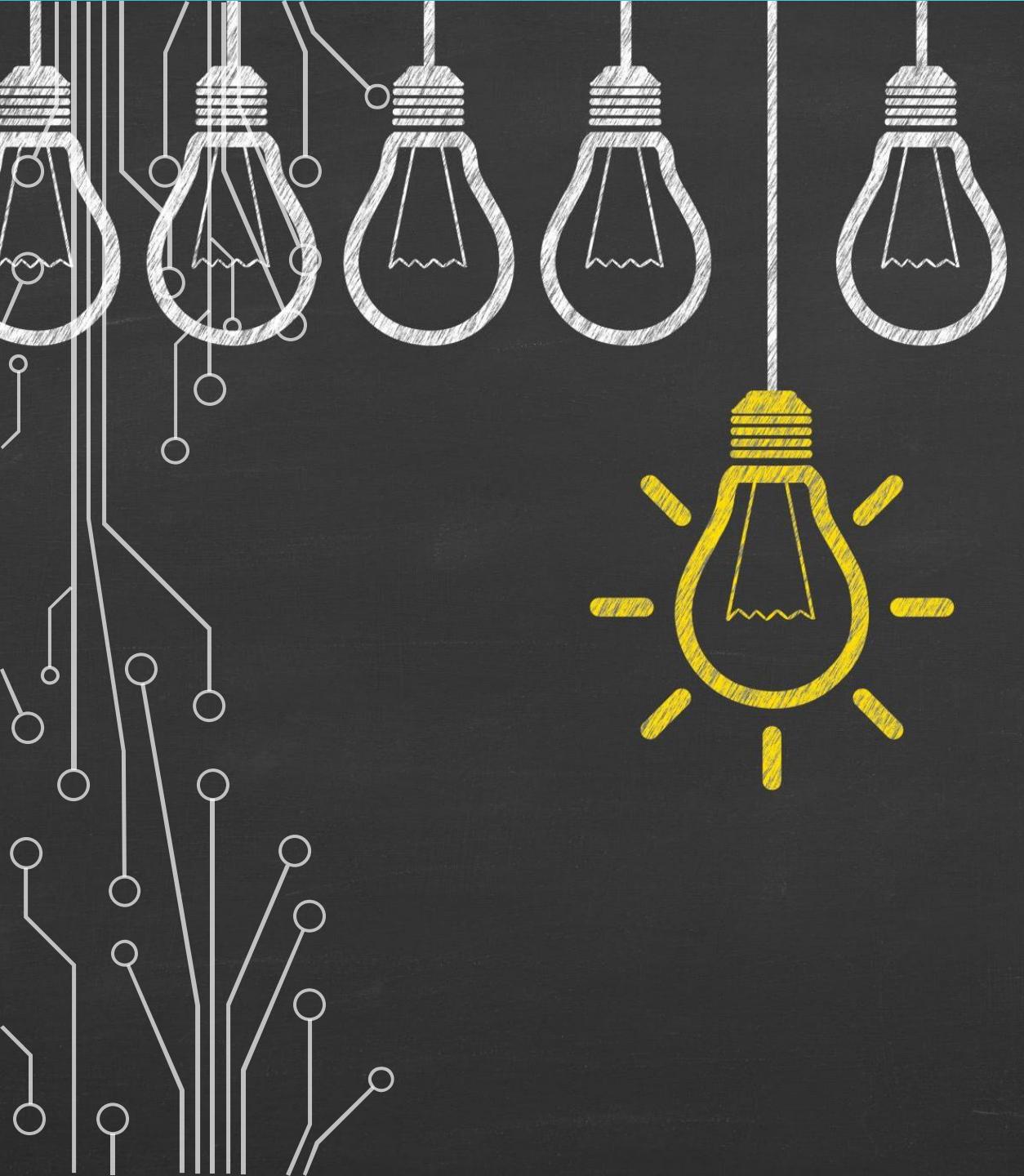
The screenshot shows the Alma Product Working Group (PWG) interface. At the top, the Ex Libris Alma logo is displayed. Below it, the title "Alma Product Working Group" is shown, along with a search bar and a button to "Show 20 entries". The main content area displays a table of members and their roles:

Member(s)	Role
Amelia Rowe (RMIT)	Co-Chair / Coordinator
Catherine Grove (Northwestern University)	Co-Chair / Coordinator

Below this, there is a section titled "Content" with social media sharing icons for Facebook, Twitter, LinkedIn, and a plus sign. The text "Joint IGeLU/ELUNA Content Working Group" is followed by the note "(Previously Knowledge Base Advisory Board (KBAB))".

The Community Zone Management Group (CZMG) functions under the auspices of the Alma Product Working Group (PWG) in collaboration with Ex Libris staff.

We have Liaison Members working in the Alma PWG and Content Working Group



ESTABLISHING A NEW FOUNDATION

- Meeting frequency – aligned with Content Working Group
- Refreshed 2014/5 charge
- Task and Finish Groups to broaden insight and deliver meaningful change
- Better communications and documentation

CZMG T&F GROUPS

- We are in the process of defining pieces of work to be accomplished by Task and Finish Groups
- Institution membership of ELUNA or IGELU will not be a requirement for involvement in T&F Group activities
- There is no prescribed limit to the number of T&F groups or the number of individuals in each group. The Groups will be administered and managed by the CZMG.

T
&

F

NEW MEMBERS CALL

- > Contact Galen or Jane if you would like to discuss what CZMG membership entails
- > A call will go out to Alma-L for expressions of interest May 2021
- > We're discussing the possibility of hosting an annual meeting open to observers
- > If you can't commit to full membership, consider joining one of our T&F Groups



Alma Community Zone Management Group

1st March 2021

Purpose

The Community Zone Management Group (CZMG) functions under the auspices of the Alma Product Working Group (PWG) in collaboration with Ex Libris staff.

Using the document created by Ex Libris and the Community Zone Advisory Group, *Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities* (Ex Libris, 2014 revised 2021 TBC), as a foundation, the group will gather, interpret, and communicate the needs of users to Ex Libris on issues relating to the practical implementation of the initial document.

The Group will also work in the best interests of the Community Zone (including the Provider Zone) and Alma users to improve the data and functionality of the CZ.

Charge

The Community Zone Management Group has a broad charge due to the range of the activities it undertakes with Ex Libris, community users, library patrons, and content providers, aggregators and publishers.

The following list indicates the extent of the Group's responsibilities:

Review, update and advise ExLibris on policies and procedures related to Community Zone bibliographic metadata, including:

- Community metadata editing best practices and field editing restrictions. Work with Ex Libris to develop and deliver training and advocacy for CZ best practices. Review existing training provisions and upgrade when necessary.
- Record merging and overwrites, especially seek to prevent automated record overwrites which degrade the CZ data after community edits. Identify conditions for record locking and seek community feedback.
- Analyze batch-loaded records from vendors or other sources as needed

Collaborate with Ex Libris to explore new ways of working with content providers and publishers "upstream" for delivering fuller and better quality into the Community and Provider Zone.

Advocate for adherence to standards with content providers, industry bodies and other metadata providers

THE NEW CZMG CHARGE

- Despite efforts over the last few years, the outdated 2014-5 Group charge remained in place up to Dec. 2020.
- In early 2021 the CZMG collaborated to produce our new Charge to reflect the changes that have occurred



KEY ASPECTS OF CHANGE

1

Gathering, interpreting, and communicating the needs of users

Developing and delivering training and advocacy for CZ best practices

Preventing automated record overwrites and record merges which degrade the CZ data after community edits



KEY ASPECTS OF CHANGE

2

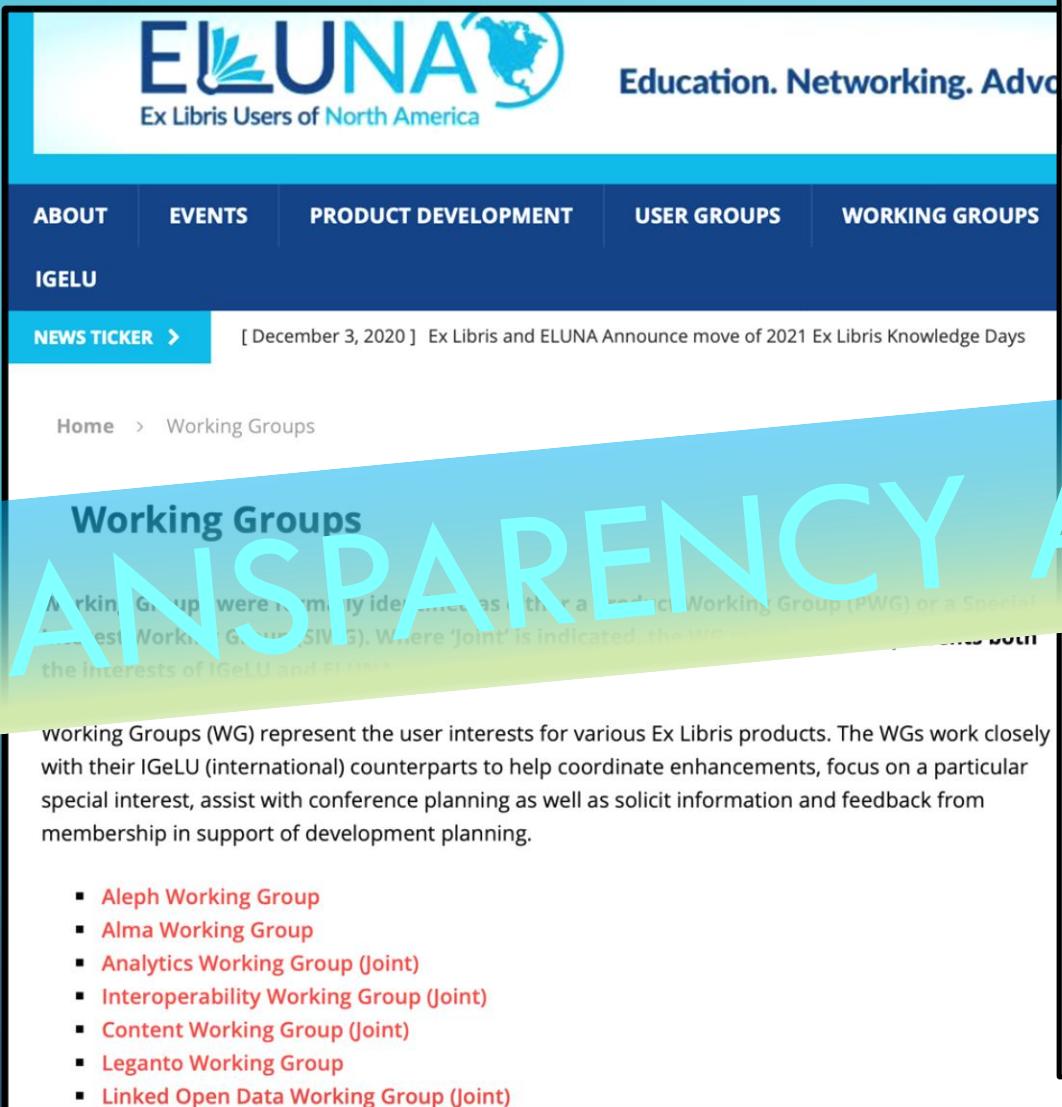
Exploring new ways of working with content providers and publishers “upstream” for the delivery of fuller and better-quality metadata

Advocating for adherence to standards with content providers, industry bodies and others throughout the entire supply chain

Establishing communication channels with Alma users and between users and Ex Libris

The CZMG's online presence has been absent for the last 6 years.

We are actively addressing this currently!



The screenshot shows the ELUNA (Ex Libris Users of North America) website. The header features the ELUNA logo and the tagline "Education. Networking. Advocacy". Below the header is a navigation bar with links for "ABOUT", "EVENTS", "PRODUCT DEVELOPMENT", "USER GROUPS", "WORKING GROUPS", and "IGeLU". A "NEWS TICKER" section displays a recent news item: "[December 3, 2020] Ex Libris and ELUNA Announce move of 2021 Ex Libris Knowledge Days". The main content area is titled "Working Groups" and discusses the purpose of working groups. A list of working groups is provided, including Aleph, Alma, Analytics, ARC, bX, Consortia WG, Content, DigiTool, Esploro, Interoperability, Leganto, and Linked Open Data. The text indicates that these groups represent user interests for various Ex Libris products and work closely with international counterparts.

Working Groups

Working Groups represent the user interests for various Ex Libris products. The WGs work closely with their IGeLU (international) counterparts to help coordinate enhancements, focus on a particular special interest, assist with conference planning as well as solicit information and feedback from membership in support of development planning.

- Aleph Working Group
- Alma Working Group
- Analytics Working Group (Joint)
- Interoperability Working Group (Joint)
- Content Working Group (Joint)
- Leganto Working Group
- Linked Open Data Working Group (Joint)



The screenshot shows the IGeLU (International Group of Ex Libris Users) website. The header features the IGeLU logo and the tagline "International Group of Ex Libris Users". Below the header is a navigation bar with links for "Home", "About us", "Transparency and Governance", "Conferences", "Working Groups", and a dropdown menu for "Working Groups". The main content area is titled "Product Working Groups" and includes a "We Want Your Feedback" section. It encourages users to share their experience and stories on Ex Libris customer service and professional service. Below this is a list of working groups, including Aleph, Alma, Analytics, ARC, bX, Consortia WG, Content, DigiTool, Esploro, Interoperability, Leganto, and Linked Open Data. The text explains that these groups are organized at the product level, with a Product Working Group (PWG) for each product and a "Joint" Working Group (JWG) for products that share common interests. The PWGs are coordinated by a Product Working Group Coordinator, who is responsible for reporting to the IGeLU Executive Committee. A note indicates that the attached document provides more information on the individual products.

Product Working Groups

We Want Your Feedback

Share your experience and stories on Ex Libris customer service and professional service here.

Product Working Groups are organised at the product level. Each group has a Product Working Group Coordinator, who is responsible for reporting to the IGeLU Executive Committee. These groups are the backbone of IGeLU. Content, for example, liaises with counterparts in ELUNA on content concerns. They have a

Product Working Groups

- Aleph
- Alma
- Analytics
- ARC
- bX
- Consortia WG
- Content
- DigiTool
- Esploro
- Interoperability
- Leganto
- Linked Open Data

See the attached document for more information on the individual products

Working Groups

- Interoperability
- Leganto
- Linked Open Data
- MetaLib
- Primo
- Rosetta
- SFX
- Show & Tell
- Summon
- Verde
- Voyager

UPDATING CZ CONTRIBUTOR GUIDELINE DOCUMENTATION

- The existing guidelines document **URGENTLY** need to be updated.
- The CZ has evolved with the emergence of the Provider Zone, local extensions, etc.
- Sometimes guidelines are not adhered to, so we hope to also clarify instructions, develop interlinking with related topics and determine which areas to concentrate our efforts to develop and deliver training

<https://knowledge.exlibrisgroup.com/@api/deki/files/60631/AlmaCommunityCatalogCatalogingStandardsPolicies.pdf?revision=2>



**Alma Community
Catalog: Cataloging
Standards, Policies,
Rights, and
Responsibilities**



“ONE OF ALMA’S GREATEST ASSETS IS ITS USER COMMUNITY. AS SUCH, EX LIBRIS HAS BEEN WORKING TO CREATE MORE OPTIONS TO ALLOW YOU TO PLAY AN ACTIVE ROLE AND COLLABORATE IN THE COMMUNITY ZONE. **EMPLOYING THE WISDOM OF A BROAD BASE BENEFITS ALL ALMA USERS.**”

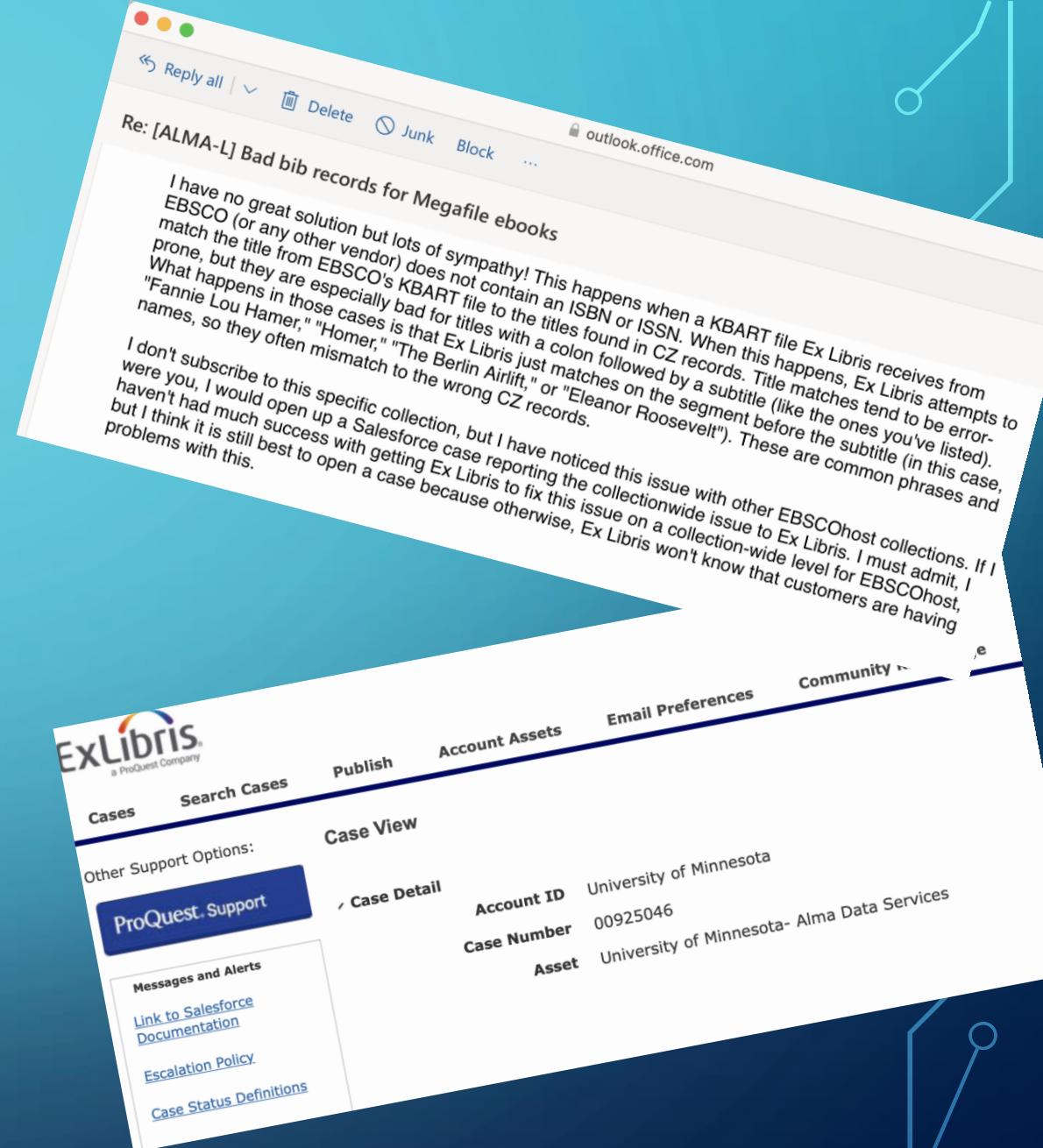
Source:

[https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030 Working with Local Electronic Resources/060Community Zone Contribution Guidelines#Bibliographic Record Contribution](https://knowledge.exlibrisgroup.com/Alma/Product Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030 Working_with_Local_Electronic_Resources/060Community_Zone_Contribution_Guidelines#Bibliographic_Record_Contribution)

ALMA-LIST & SUPPORT CASES

CZMG members monitor issues raised on Alma-L and indeed within their own institutions.

A recent item brought forward onto the agenda relates to the issues we face with incorrect record matching for Ebsco ebooks without identifiers.



.. Tackling gnarly issues with multiple causes in collaboration with Ex Libris and suppliers

BRIEF LEVEL RECORD DEFINITIONS

- The record level definitions were revised and reassigned to CZ records in Nov. 2020
- CZMG members have remaining concerns about the ISSN requirements (i.e. that a CZ serial record can be assigned level 9 without an eISSN)

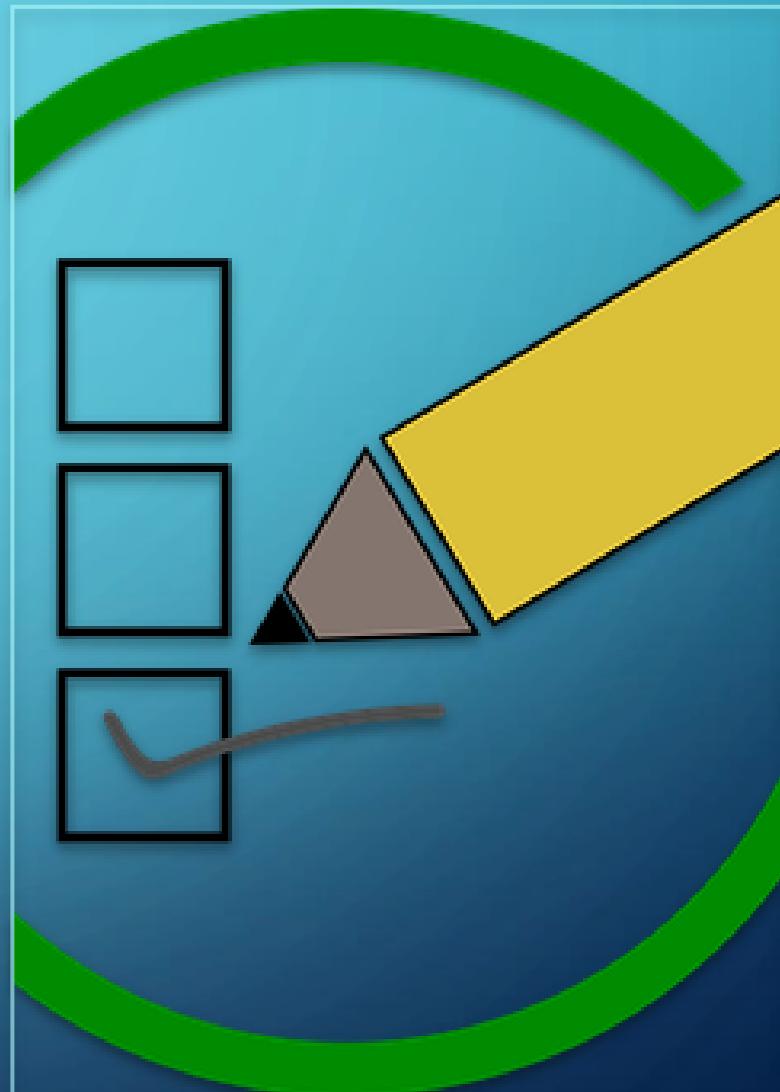
Brief Level/Type	Monographs	Serials
1	No 245 title exists	No 245 title exists
2	No ISBNs (020\$a or 776\$z) or Authors (100/110/111/700/710/711) exist	No ISSNs (022\$a or 776\$x) or classification numbers (050 or 082) exist
3	No Authors (100/110/111/700/710/711) exist	No classification numbers (050 or 082) or 650 (subject) exist
4	n/a	No ISSNs (022\$a or 776\$x) exist
5	No 260 or 264 exists	No 260 or 264 exists
6	n/a	No classification numbers (050 or 082) exist, but has 650 (subject)
7	No 6XX subjects exist	No 6XX subjects exist
8	Missing 505 or 520	No 010 or 016 exists
9	No e-ISBN (020\$a) exists	No e-ISSN (022\$a) exists
10	Records with title, e-ISBN, Authors, Publisher data, Subjects, 505 AND 520	Records with title, e-ISSN, Publisher data, Subjects, 010 OR 016, 050 OR 082

COMMUNITY SURVEYS

You will soon receive the first CZMG survey via Alma-L relating to editing, adding and deleting fields in CZ records.

We want to understand how the community works with CZ metadata, whilst also considering the system requirements for link resolution.

Please engage with the survey (which should take about 10 mins to complete) as this will help us inform the work we do.



CONTACT US

Galen Jones

galen.jones@open.ac.uk

CZMG Chair | Metadata Specialist, The Open University

Jane Daniels

j.daniels@cardiffmet.ac.uk

CZMG WHELP Rep. | Bibliographic Librarian, Cardiff Metropolitan University

