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## Digitizing and cataloging a corporate annual reports collection: a Canadian perspective

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## **Digitizing and cataloging a corporate annual reports collection: a Canadian perspective**

Corporate annual reports provide a snapshot of a company's operations and financial status. Reviewing and comparing years of annual reports can provide a rich history of knowledge on a corporation. Preserving, storing, and digitizing Canadian annual reports has been a mission of the C.B. "Bud" Johnston Library in London, Ontario, Canada. In late 2019 when Western Libraries migrated to a new library services platform, Alma, there was a new opportunity to catalog and provide access to the digitized annual reports collection. This article describes a decade long plan to digitize the print collection by library staff and a subsequent project to provide online access to the digitized content. Included is a discussion of cataloging methods, staffing, training, inventory control, and hosting solutions.

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## **Introduction**

Corporate annual reports to shareholders are:

Financial statements of an organization generally published annually ... [they] consist of a profit and loss account, balance sheet, cash-flow statement, statement of total recognized gains and losses, and reconciliation of movements in shareholders' funds, together with supporting notes and the directors' report and auditors' report (Law, 2016).

The depth of information held within these reports makes them an important tool for researchers investigating the historical business activities of corporations. Annual reports provide invaluable information that can be difficult to acquire elsewhere including exclusive photographs (corporation images, advertising campaigns, etc.), staff profiles, detailed business location data, and listings of board of directors and officers. Traditionally, corporations would mail print copies of their annual reports to shareholders. With the advent of the Internet, many corporations began to offer their annual reports digitally in addition to their print offerings. As a result, some academic libraries ceased collecting them in print and many collections were discarded for increased student space, while some were sent to off-site storage.

While reports from the mid-1990's onwards can be found online through company websites or governmental commissions, such as SEDAR and EDGAR, many historical reports are only available in print and have not been digitized for online access. This is particularly the case for annual reports from the first half of the 20<sup>th</sup> century. Lyle (2004) emphasizes this in the article *Archiving of Annual Reports on Fortune 500 Corporate Web Sites* stating:

The uncertainty of access to older reports through corporate Web sites points to the value of annual report digitization projects, collections of paper reports particularly for smaller companies of strong local interest, and annual report archives offered by commercial vendors (p. 11).

A researcher interested in the annual reports of a corporation, particularly smaller corporations, prior to the mid-1990s would most likely have to contact a library or archive owning the material and request to view the print material in person. Depending on the library or archive, the researcher may be able to request a digitized version for specific years, but this is often fee-based. Some databases do provide digitized annual reports, such as ProQuest's Historical Annual Reports and Mergent Archives, but full run coverage is frequently inconsistent. This is especially the case for researchers interested in Canadian corporations; given Canada's smaller market most database providers based in the United States do not provide extensive coverage of Canadian companies in general. Researchers often encounter numerous roadblocks while searching for information on ceased, amalgamated, or merged Canadian corporations.

To aid scholars in their pursuit of historical information, a few Canadian universities have begun to digitize their print corporate annual report collections. Of the 29 Canadian Association of Research Libraries academic members, two libraries are in the process of digitizing their collections: McGill University in Quebec and Western University in Ontario. [McGill University's](#) collection is freely available online and "consists of annual reports from approximately 2,000 Canadian corporations", though it contains "only a selection of reports from various companies" (McGill University, n.d.). Judith Nixon, a librarian emeritus at Purdue University, compiled a [merged list of annual reports collections](#) at predominantly academic business and economics libraries (Purdue University Libraries, n.d.). Based on Nixon's (2010) analysis, Stanford and Harvard

Universities have the largest collections of annual reports – based on total number of corporations – followed by Western University in Ontario. This list evolved into a searchable database hosted on Purdue University Libraries website, which assists researchers interested in locating specific corporate annual reports in collections at nine libraries across North America. Nixon is also the author of a 2010 article in *College & Research Libraries* entitled “Annual Reports to Shareholders: Historical Collections in Libraries,” which further analyzed the collections of twelve academic libraries. This article will discuss the digitized collection at Western Libraries and the ensuing efforts to catalog and host it for researchers.

### **Collection history**

Western Libraries is the library system for Western University, also known as the University of Western Ontario, and is in London, Ontario, Canada. The authors acknowledge that Western University is located on the traditional lands of the Anishinaabek, Haudenosaunee, Lūnaapéewak and Chonnonton Nations, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. Western Libraries employs approximately 130 staff, librarians, and archivists. The campus has seven library locations on its main campus and boasts a strong partnership with its three affiliated university colleges and one seminary, each of which has their own library. The C.B. “Bud” Johnston Library is Western Libraries’ business library and supports the research and scholarship of the Ivey Business School. The Johnston Library has actively collected corporate annual reports to shareholders throughout the latter half of the twentieth century and by the year 2000, its collection held approximately 6,300 corporations. The collection has continued to grow and now contains the reports for more than 9,000 corporations, most of which are Canadian. This advancement has generally been through individual donations and several

strategic partnerships. One such partnership was with Natural Resources Canada, a federal governmental office, which donated their collection of corporate annual reports to the Johnston Library in 2015. These reports include 3,900 Canadian mining and mineral corporations of various sizes dating back to 1905 and their holdings exceed 77 linear feet. One condition of the donation was that the reports must be made accessible to Natural Resources Canada staff periodically at their request. Individual donors have generously provided their corporate annual reports collections as well, and larger donations have been contributed by other academic libraries. One such donation was from Brock University in St. Catharines, Ontario, while in preparation of upcoming library renovations, sought to relocate their collection of winery reports and corporations from Southern Ontario. This donation consisted of more than 500 reports from 285 corporations, some of which completed missing years in the Johnston Library collection. As the print collection continued to grow, questions regarding its size and accessibility began to develop.

### **Digitization history**

Western Libraries staff and librarians began to have discussions in 2004 to decide how to best manage and preserve this uniquely Canadian collection. The costs of converting the collection to a digital format depended on a variety of factors such as staffing resources, equipment and storage costs, and access to the print collection. It became clear that a long-term preservation plan was necessary to ensure proper stewardship of the collection as it continued to grow. To address this, the Director of the Johnston Library developed a project plan for funding support of the scanning program and subsequently applied to the *EMC Heritage Trust Project* grant. The Heritage Trust Project grant began in 2007 “to recognize organizations and individuals that protect and preserve invaluable cultural information from around the world through digitization” (Dell Technologies, 2011).

EMC Corporation, now Dell EMC, awarded this grant to the Johnston Library in 2011. The grant fueled a large-scale digitization project led by library staff, which supported scanning processes such as new equipment, and hiring students during the summer academic break to scan the annual reports page by page. Using grant funds, two student assistants were contractually hired during the summer of 2011 and scanned a total of 3,436 individual annual reports during their terms. Once the funds were exhausted, the Johnston Library continued to employ new students from its budget to advance the project and provide a source of income for undergraduate students pursuing their studies. In addition to their other library duties, the students have mainly been responsible for the bulk of the scanning and digitizing work including cropping pages and ensuring reports have optical character recognition (OCR) applied. OCR allows researchers the ability to search for specific words used in each annual report and aligns with accessibility guidelines. To date, digitization of this collection has been stored on an internal library server with staff coordinating access to requested reports, via the library website. Academic researchers at Western University can retrieve the individual reports at no cost while outside academic researchers can request free copies. For all other interested parties, such as law firms and consulting businesses, a fee applies to reports not already digitized by noting the total number of pages requested and the scanning time involved. Once the invoice is paid the reports are emailed to the purchaser in PDF format.

While digitization efforts progressed, the storage location of the print collection evolved. In 2013, the Ivey Business School, in which the Johnston Library is located, relocated to a new building across campus. To accommodate the new library location, a new storage solution was necessary to house the large print collection. Two storage solutions have been implemented to ensure long-term preservation and access to the collection. The first solution included sending the print reports to an off-campus storage facility in plastic

sleeves and Western Libraries has an arrangement for a third-party to delivery boxes to campus libraries when requested. The second solution included a partnership with Mergent Inc., which approached the Johnston Library, to scan the reports held in the original collection of approximately 6,300 corporations. The arrangement with Mergent allowed the content to be scanned and uploaded into the Mergent Archives database and the original print reports to be returned to the library for storage. This solution allowed the collection to be accessed by subscribers of Mergent Archives internationally, signifying the importance of the Canadian content.

### **Providing access to the digitized reports**

The decision to digitize the collection necessitated a further discussion regarding online access to the annual reports for Western University researchers. As a first step, the digitized collection was added to Western Libraries' Content Management, Discovery and Access unit to its 2018-2019 operational goals, with an aim to improve user access to this unique content. This unit includes three internal teams: collections, acquisitions, and metadata. The authors of this article include the Director of the Johnston Library, who is a member of the collections team, a metadata management librarian, and a co-op librarian -- both from the metadata team. In late 2019, the Director and the metadata librarian met with the annual reports collection coordinator to define the scope of the digitized collection and the Johnston Library's goals for it. Copyright was also a consideration, though corporate annual reports to shareholders are public documents and often do not have copyright statements within them. Following statements made on McGill University's Canadian Corporate Reports website (McGill University, n.d.b.), copyright was concluded to be governed by the Canadian Copyright Act and its provisions for fair dealing for academic institutions.

Following the meeting with the Director and annual reports collection coordinator, the metadata librarian wrote a detailed project plan. This plan included an in-depth overview of researcher interests in the collection, a cataloging environmental scan, hosting solutions, staffing, cataloging processes, inventory management, and methods for user access. The following sections of this article will further elaborate on each of these areas.

## **Cataloging methods**

### ***Environmental scan***

To determine the best cataloging method for corporate annual reports, the metadata librarian conducted an environmental scan of the library catalogs of the other eight universities mentioned in Nixon's 2010 article. Also consulted was an American Research Libraries (ARL) SPEC kit from the year 2000, entitled "*Managing Corporate Annual Reports*", compiled by Lisa O'Connor of Kent State University. The SPEC kit included a survey that was distributed to 121 ARL member institutions; of those who responded, 26% stated that they cataloged their reports, but only with brief records, while 43% of respondents did not catalog their reports at all (O'Connor, 2000). Of the eight institutions in Nixon's article, two did not have catalog records for their collections or individual reports: [Harvard](#) and [Purdue](#) universities. [Cornell University](#) and the [Massachusetts Institute of Technology](#) cataloged the entirety of their collections in one record. Others such as Yale, Stanford, [Northwestern](#), [Alabama](#), Princeton universities, and the New York Public Library, have cataloged portions of their collections in MARC 21. Most of these collections have brief records and do not include access to digitized copies. [Columbia University](#) digitized the annual reports of 36 companies in 2007, 770 reports, which are available via the [Internet Archive](#) (Columbia University, n.d.). Similarly, the [University of Pennsylvania](#) has digitized their annual reports collection from 1800-1955, which are available on their university website. The only Canadian

university to digitize their reports for public use was the previously mentioned McGill University, though their site appears to not have been updated since 2005 and has no clear use of a metadata schema.

### *Cataloging processes*

Based on the environmental scan, there were two predominant methods used to catalog corporate annual reports to shareholders at academic institutions. These methods were:

- (1) By corporation name with a list of holdings (e.g., Canadian Tire, 1956-1995)
- (2) By year for each individual report (e.g., Canadian Tire 1956).

The first method was the least labor intensive, as a single record for the corporation itself is created and from this all holdings can be attached. An example of this method can be found in Princeton University Library's catalog record for [Boeing Company](#), which includes reports from 1962-1992. Harmon and Burk's (2000) article in *Cataloging & Classification Quarterly*, entitled "Better Service Through Flexible Rules: Cataloging a Collection of Annual Reports in a Most Un-CONSER-Like Manner", also recommends this method: "... a single record, so that users in OCLC WorldCat and in our local system would not need to deal with different records for title and corporate name changes" (p. 44). Additionally, Harmon and Burk (2000) discussed how this method is the simplest for the user as an access point: "...anyone looking for the report of a particular foundation [can] see at a glance that we have the annual reports and our years of coverage" (p. 45). The second method, cataloging individual reports by year, is time-consuming for staff, as a cataloger must review each report and describe it thoroughly. This method would significantly reduce the speed at which reports could be cataloged and added to Alma's digital collection and may obstruct user discoverability, as Harmon and Burk mentioned above. To advance this project, the metadata management librarian selected the first method to catalog the collection and created a cataloging template to be used. This

template is attached as an appendix to this article as a reference point for interested parties.

### ***Selecting a cataloging and hosting product***

When this project was in development, two products were seriously considered to catalog and host the digitized annual reports: Ex Libris' library services platform Alma and Primo VE and Omeka S, developed by Digital Scholar. Alma is a subscription product, whereas Omeka S is open access. Alma uses digital collections to group related bibliographic records and digital representations together, whereas Omeka S "creates a local network of independently curated exhibits sharing a collaboratively built pool of items and their metadata" (Corporation for Digital Scholarship, n.d.a.). Comparing the two systems, one of the most important aspects in the decision-making process was the metadata standards available to catalog materials. Alma is compatible with MARC 21, UNIMARC, KORMARC, CNMARC, Dublin Core, and MODS (Ex Libris, 2021a); Omeka S is pre-loaded with Dublin Core, Bibliographic Ontology, and Friend of a Friend (Corporation for Digital Scholarship, n.d.b.). Alma has additional functionality that allows bibliographic records to be stored locally in an Institution Zone or to be shared with consortia members in a Network Zone, if configured. Lastly, server space and hosting were important considerations for Western Libraries; Alma does not require a local server to host files, while Omeka S does. As Western Libraries' cataloging unit was responsible for this project, a metadata standard that all staff were familiar with was of the utmost importance, with MARC 21 preferred. Based on the above criteria and Western Libraries environment, Alma and Primo VE were selected as the cataloging and hosting solution for this collection.

### *Staffing and training*

Western Libraries have historically used Innovative Interfaces' Sierra for circulation and cataloging, and their Millennium software prior to that. However, in December 2019 the Libraries migrated to Ex Libris' Alma as part of a consortia effort to increase shared physical collections and staff collaboration between universities in Ontario. Utilizing Alma's networking capabilities, sixteen university libraries now share bibliographic records and a shared discovery layer, Primo VE. Migrating to a new cloud-based library services platform created a great deal of manual metadata cleanup, which has limited the amount of time the cataloging unit has had available for this project. Due to these migration obstacles, other staffing models were considered to propel this project forward. Models considered included the possibility of hiring an educational co-op librarian from Western University's Master of Library & Information Science program and proposing that a temporary full-time staff member be hired. Based on advice from the head of metadata, a co-op librarian position was developed by the metadata management librarian leading the project. This proposal was accepted by Western Libraries' senior leadership and with available funding, a student was hired for an eight-month inclusive contract. Fortunately, the master's student that was hired already held a library technician diploma and required less rigorous cataloging training, though they were refreshed on original cataloging basics and Western Libraries local policies. Overall training included reviews of Library of Congress Classification, Library of Congress Subject Headings, MARC 21 format, Cooperative Online Serials Program (CONSER), Ex Libris' Alma Essentials program (including navigation, searching, metadata editor, and cataloging templates), and Alma Digital Collections (particularly digital resources and uploading of documents).

### ***Inventory control***

Prior to the co-op librarian's start date, the metadata management librarian decided to use spreadsheets to monitor the overall progress of the project. The spreadsheets have columns which list each corporation's name, its cataloged metadata management system ID (Alma MMS ID), its cataloging date, and any relevant notes on the corporation (such as name changes, subsidiaries, amalgamations, mergers, and more). Two spreadsheets are utilized as the Johnston Library has two sets of digitized reports, one from the current digitization effort led by library staff, and the other set which contains files that were previously digitized. Each spreadsheet tracks the number of cataloged reports to date and the fluctuating coverage dates of the reports (e.g., 1912-15, 1930-35, etc.). Each digitized set contains varied report dates, and while there is some overlap, one set contains missing years and corporations that the other set does not contain. Searching in each spreadsheet reduces the amount of time it takes for the co-op librarian to find the appropriate annual report years and to cross check the second set of reports for missing content. For this project, the spreadsheets are an essential tool in the cataloging workflow, as they assist in locating all years associated with a particular company between each set and ensure that all report years are uploaded to Alma correctly.

### ***Linking entry fields***

When the co-op librarian began cataloging, the use of MARC 21 linked entry fields (78X) was discussed with the metadata management librarian leading the project. In accordance with MARC 21, these fields are used to specify "a different relationship between the target item being described by the record and a related item" (Library of Congress, 2017). It was decided by both librarians that while adding these fields and researching their relationships was a large investment of time, it may be an important finding aid for users searching the metadata for alternate corporation names, corporate acquisitions,

subsidiaries, and parent relationships. When users find these relationships within records, their related entries (corporations) are easily accessible via Related Title links. When a linked entry was added to a record, a 500 - General Note field was also included to further describe the relationship and its significance. Three linking fields, 780, 785, and 787, were used most frequently as they best represented the business relationships between companies. A 780 field for a Preceding Entry was added if a company had a previous name or names and was also used when a company acquired another. For example, when creating a linked entry in the bibliographic record for Hudson's Bay Company to display the acquisition of Zeller's Limited in 1981, a 780 field was added as such: "\$t Zeller's Limited, annual reports, \$d [years of reports available]." A 785 field for a Succeeding Entry was added if a company was acquired, merged, or amalgamated with another company. For example, when creating the bibliographic record for Zeller's Limited, a 785 field was added to display the relationship between the two companies -- the acquisition of Zeller's Limited by Hudson's Bay Company. This relationship was entered as "\$t Hudson's Bay Company, annual reports, \$d [years of reports available]." Lastly, a 787 field for Other Relationship Entry was added to parent/subsidiary company relationships and/or if a company merged or amalgamated to form a new company. An example of this is Loblaw Companies Limited, which is a wholly owned subsidiary of George Weston Limited. When creating bibliographic records for these corporations, each contains a 787 entry to link to the other company record. These related entries can help users find additional corporate information they may not have been aware of that may be beneficial to their research.

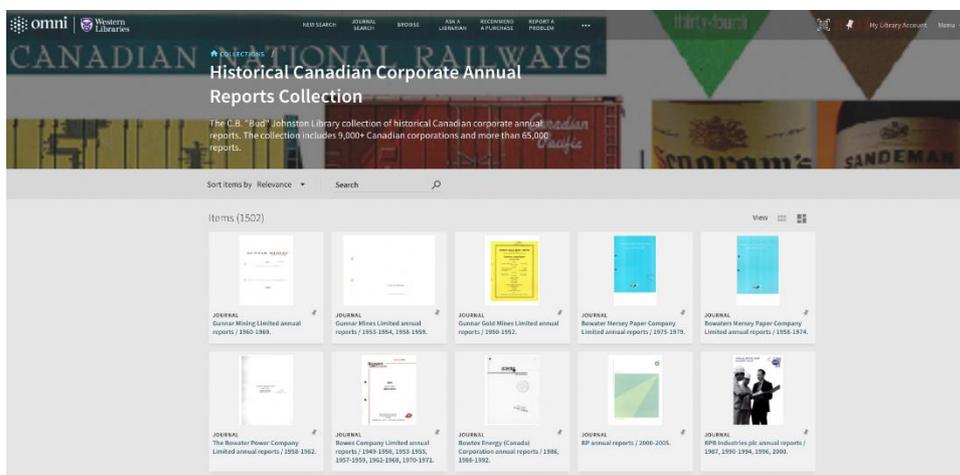
### ***Utilizing Alma and Primo VE collection discovery***

Incorporated into Alma's infrastructure is the ability to create digital collections and display them in Primo VE. Alma digital collections aggregate bibliographic records with

a relationship, such as topics or subjects (Ex Libris, 2021b), and group them together for users. A collection can house a sub-collection and a sub-collection can have a sub-collection within it. For this project, a collection was created entitled “Historical Canadian Corporate Annual Reports” (Figure 1). When a bibliographic record for a corporation was cataloged, it was added to this digital collection and digital representations (the annual reports) were attached to the bibliographic record. In Alma, representations were added using the digital representation resource editor File List tab. When the annual reports uploads are complete, users can access the bibliographic records and their associated reports via the collection discovery area in Primo VE. The bibliographic records are also keyword searchable for users utilizing the basic and advanced search toolbars.

### Figure 1

*A screenshot of the Collection Discovery lobby page of the Historical Canadian Corporate Annual Reports Collection in Western Libraries Primo VE.*



### Uploading reports to Alma

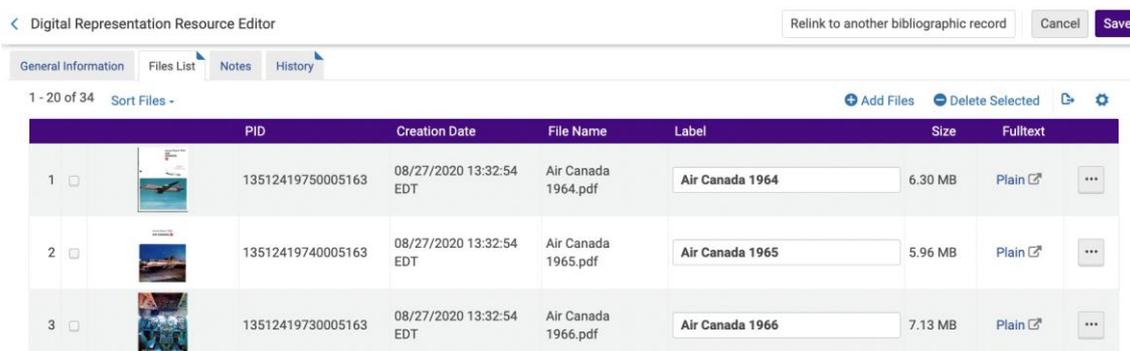
Alma has a maximum upload size of one gigabyte per file. The digitized annual report files typically range between 100-300 kilobytes to 100-200 megabytes, though there are instances where some files are over five hundred megabytes. Alma does not limit the number of files in a collection, and this project currently has more than 5,000 uploaded

annual reports. More than 2 terabytes of digitized content are stored on Western Libraries internal servers.

To upload reports in Alma, representations need to be added to each bibliographic record. The representations for this project are labelled as “Company Name” Annual Reports and have restricted access for registered users of Western University and its affiliates. After the representation is created, files are uploaded from Western Libraries’ servers to the Alma cloud. Next, inconsistent file names are updated to maintain a uniform experience for the user, as shown in Figure 2. Finally, the labels are sorted to confirm that the files are listed in chronological order in Primo VE.

## Figure 2

*A screenshot of Alma’s Digital Representation Resource Editor – File List tab.*



	PID	Creation Date	File Name	Label	Size	Fulltext
1	13512419750005163	08/27/2020 13:32:54 EDT	Air Canada 1964.pdf	Air Canada 1964	6.30 MB	Plain
2	13512419740005163	08/27/2020 13:32:54 EDT	Air Canada 1965.pdf	Air Canada 1965	5.96 MB	Plain
3	13512419730005163	08/27/2020 13:32:54 EDT	Air Canada 1966.pdf	Air Canada 1966	7.13 MB	Plain

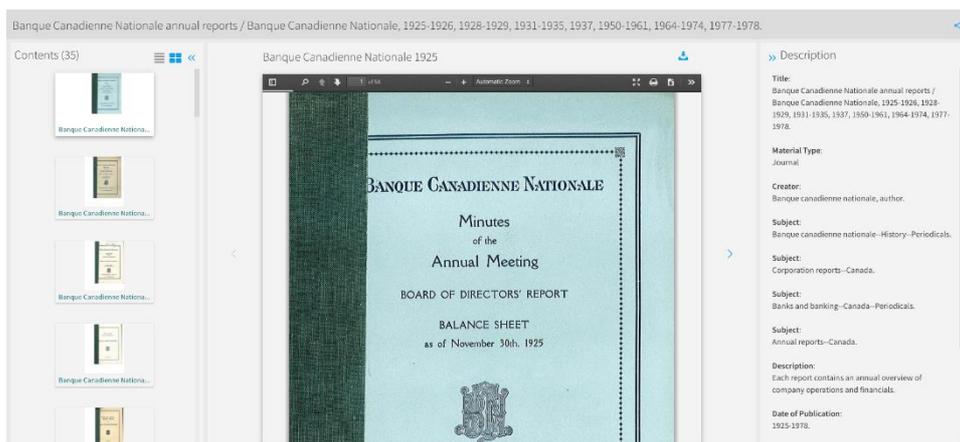
## Testing in Primo VE

The co-op librarian tests the uploaded files in Primo VE to ensure that the metadata displays correctly for users. The 78X linking fields are also tested to confirm they lead to the correct associated bibliographic records for accessibility and searchability via the other company names. Uploaded material is tested by accessing the PDF files in the Primo VE PDF viewer, after logging into My Account. Access to the digitized reports is currently limited to primary users of the university, staff, faculty, and students. Authorized users can view and download these reports once they have logged in with their university credentials. Those who do not have access, or have yet to sign in, will

simply see a prompt that they do not have permission to view the PDFs. The PDF viewer displays the first chronological dated report first and subsequent years display on the left sidebar for users to select from as they wish, as displayed in Figure 3. To date, there have been no issues accessing these files, however, loading time of files can vary from seconds to minutes, depending on their size and page length. Lastly, users can search words or phrases within the text of each PDF and can download the PDFs or print each file while in the viewer.

### Figure 3

*A screenshot of Primo VE's PDF viewer when a user is signed in, displaying the digitized corporate annual reports.*



### Progress to date and future steps

Progress on the project has been very successful to date. Digitization efforts continue at the Johnston Library with student assistants scanning the remainder of the collection with library assistants' vetting their completed work. Digitization will continue for the next several years until the collection is scanned in its entirety. Cataloging and uploading of digitized content will be paused in January 2022 to evaluate the eight-month pilot project with the co-op librarian and determine future goals. Areas of the project that require further examination include usage analysis, staffing, and the possibilities of future collaboration with partners. The usage of the uploaded files by researchers will be

monitored by the metadata librarian using Alma Analytics, which records the total number of views and downloads each report has received. Further investigation also needs to be conducted on cloud storage space availability and fees in our current system. Sharing these figures with managers may help to determine the future staffing model for this project and its continuation.

In addition to staffing, consortia cataloging guidelines of specialized collections such as this need to be further developed. Currently, the bibliographic records for this collection are stored in Alma's Institution Zone and are not shared with consortia partners in the Network Zone. As these bibliographic records are unique to the Johnston Library collection, their usefulness to partners is not clear and discussions with the consortia metadata standards committee must be investigated. Alternatively, approaching the Canadian Research Knowledge Network (CRKN), an 81 member Canadian consortium of libraries, and provider of the Canadiana database (Canadian Research Knowledge Network, n.d.a.) is another option for this collection. The Canadiana database "contains over 19 million pages (96,000 titles) of digitized historical publications, including monographs, serials, and government publications" (Canadian Research Knowledge Network, n.d.b.), and would be an ideal collaborator for the early Canadian corporate annual reports in this collection. Further conversations with all interested parties will be necessary prior to a second phase of this project. It is the desire of the authors that this project continue with adequate staffing and resource allotment.

## **Conclusion**

The corporate annual reports collection curated by the C.B. "Bud" Johnston Library at Western University is an archive of Canadian historical business significance and is the largest Canadian retrospective of print corporate annual reports. Most of these reports are not available freely on the internet and are a valuable tool for researchers. Throughout the

past decade, student assistants at the Johnston Library have digitized a significant number of individual reports and considerable progress has been made to provide online access to this collection over the past eighteen months. Alma was chosen to host the collection, MARC 21 was used as the format for displaying the bibliographic data, and a co-op librarian was hired to begin cataloging and uploading these reports. During the co-op librarian's eight-month term at Western Libraries 1,372 corporations were cataloged out of 9,013 total, which accounts for 15.2% of the collection. Of the 52,847 digitized PDF files, 12,198 have been uploaded to Alma, which is 23% of the collection. While progress will be paused to discuss and evaluate the pilot project, the metadata management librarian hopes that the project will continue, that all the companies will be fully cataloged, and a collaboration with CRKN is possible to further increase the accessibility of this important Canadian collection.

### **Acknowledgments**

This article is dedicated to Jerry Mulcahy, retired Director, and Patrick Nelligan, retired Library Assistant, both from the C.B. "Bud" Johnston Library. The continued growth of the collection and access to the corporate annual reports would not have been possible without the forethought and commitment of these two individuals.

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## Appendix A

### Annual reports cataloging template

Element & Indicators	Label	Use
<b><i>Leader</i></b>		
05	Record status	n – New
06	Type of record	a – Language material
07	Bibliographic level	s - Serial
17	Encoding level	Blank – full level
18	Descriptive cataloging form	i – ISBD punctuation (RDA)
19	Multipart resource record level	# - not specified
<b><i>006 – Additional Material Characteristics</i></b>		
00	Form of material	m – Computer file/electronic resource
06	Form of item	o – Online
09	File type	d – Document
<b><i>007 – Physical Description Fixed Fields</i></b>		
00	Category of material	c – Electronic resource
01	Specific material designation	r – Remote
03	Colour	c – Multi-coloured
04	Dimensions	n – Not applicable
05	Sound	No attempt to code
06-08	Image bit depth	No attempt to code
09	File formats	a – One file format
10	Quality assurance targets	a - Absent

11	Antecedent/source	a – File reproduced from original
12	Level of compression	u – Unknown
13	Reformatting quality	a – Access
<b>008 – Fixed-Length Data Elements – General Information</b>		
Language material		
06	Type of date/Publication status	i – Inclusive dates of the collection
07-10	Date 1	Year the reports began
11-14	Date 2	<b>Required</b> Input 9999 if the company is still active. Input the year the reports end if the company is defunct, acquired, merged, etc.
15-17	Place of publication	<b>Required</b> (e.g. ont - Ontario) <i>If you are unsure, use xx</i> (unknown)
18	Frequency	a - Annual
19	Regularity	r - Regular
20	Undefined	#
21	Type of continuing resource	# - None of the following
22	Form of original item	# - None of the following
23	Form of item	o – Online

24		Nature of entire work	# - No specified nature
25-27		Nature of contents	# - No specified nature of contents
28		Government publication	# - Not a government publication
29		Conference publication	0 – Not a conference publication
30-32		Undefined	#
33		Original alphabet or script	a – Basic Roman
34		Entry conversion	0 – Successive entry
35-37		Language	eng – English <b>OR/AND</b> fre – French <i>Examine reports to determine language(s).</i>
38		Modified record	# - Not modified
39		Cataloging source	d – Other
<b><i>Variable Data Fields</i></b>			
020	Blank	ISBN	If provided <i>(Examine reports – often not available)</i>
022	Blank	ISSN	If provided <i>(Examine reports, often not available)</i>
040	Blank	Cataloging source	\$a Institution Code \$b eng \$e rda

041	Blank	Language code	Required if there are more languages than 008/35-37 allows
088	Blank	Report number	If applicable/found
110	2 #	Main entry (corporate body)	<b>Required</b> \$a [Corporation name], \$e author. Always consult Library of Congress Authorities
243	0 0	Collective uniform title	<b>Required</b> \$a Annual reports
245	1 0	Title	<b>Required</b> <i>Example: \$a Imperial Life Assurance Company of Canada annual reports / \$c Imperial Life Assurance Company of Canada, \$f 1949-78, 1986-90, 1992, 1994.</i>
246	1 #	Varying form of title	<b>Required</b> Only if the company has a name in another language. <i>Example: \$a Company Name annual reports \$f 1949-</i>

			1978, 1986-1990, 1992, 1994
264	# 1	Publication, distribution (imprint)	<b>Required</b> <i>Example: \$a Toronto, ON : \$b Air Canada, \$c 1964- 1995.</i> <i>If unsure of location use:</i> <i>\$a [Place of publication not identified]</i> <i>\$c [For dates, use the first year of the reports to the last.]</i>
300	Blank	Physical description	<b>Required</b> <i>\$a 15 reports : \$b illustrations (full color) ; \$c 23-30 cm</i>
310	Blank	Current publication frequency	<i>\$a Annual</i>
336	Blank	Content type	<i>\$a text \$b txt \$2 rdaccontent</i>
337	Blank	Media type	<i>\$a computer \$b c \$2 rdamedia</i>
338	Blank	Carrier type	<i>\$a online resource \$b cr \$2 rdacarrier</i>
362	1 #	Dates of Publication and/or Sequential Designation	<i>\$a Reports available for the years of [report dates].</i>
500	Blank	General note	<i>\$a Description based on: [first year in collection]; title from cover.</i>

500	Blank	General note	<p>Include if the company has changed its name, merged, etc. Anything you would include in a 785 or 787 include information here for the user. Include dates if you can.</p> <p><i>Example:</i></p> <p><i>\$a Abitibi Power &amp; Paper Company Limited changed its name to Abitibi Paper Company Ltd in 1965.</i></p>
513	Blank	Type of report	\$a Annual report, \$b [years of coverage]
520	Blank	Summary note	\$a Each report contains an annual overview of company operations and financials.
533	Blank	Reproduction note	\$a Digitally scanned in \$b [city, province] \$c [library], [University]

546	Blank	Language note	<p><b>Use only if there is more than one language. Include in the 041.</b></p> <p>\$a In both English and French</p>
588	0 #	Source of title proper	<p>\$a December 31, [year]; title from cover.</p> <p><i>Note: consult latest report (issue).</i></p>
610	2 0	Subject added entry – Corporate name	<p>\$a Corporation name \$x History \$v Periodicals</p> <p><i>Example: \$a Canadian Tire Corporation \$x History \$v Periodicals</i></p>
650	0-2 (based on primary or secondary subject) 0	Subject added entry – Topical term	<p>\$a Corporation reports \$z Canada</p> <p>\$a [Industry] \$z Canada \$v Periodicals</p> <p><i>Example: \$a Retail trade \$z Canada \$v Periodicals</i></p> <p>Consult: assigning Library of Congress subject headings guide</p> <p>Consult: Classification Web</p>

655	# 0	Genre	\$a Annual reports \$z Canada \$2 lcf
710	2 #	Added Entry - Corporate Name	\$a [Corporation name], \$e associated name. <b>Include any names mentioned in the 780, 785 and/or 787.</b> <i>Only for subsidiaries, or parent companies, etc.</i>
780	0 2	Linking entry – Preceding entry (earlier title)	\$t [Corporation name] annual reports, \$d [years we have scanned available for the other company name] Use if a company has been merged or acquired. <i>Example: \$t Trans-Canada Airlines annual reports, \$d 1937-1965.</i>
785	0 2	Linking entry – Succeeding entry (later title)	\$t [Corporation name] annual reports, \$d [years] Use if a company has been merged or acquired.

			<p><i>Example: Supertest Petroleum was acquired by BP Canada, Inc.</i></p> <p><i>Example: \$t Supertest Petroleum Corporation, Limited annual reports, \$d 1950-1970.</i></p>
787	0 #	Linking entry -- Other relationship	<p><b>Required</b></p> <p>\$t [Corporation name] annual reports, \$d years we have available.</p> <p>This field can be used if there is a relationship between two companies that you know of (e.g., subsidiaries). For example, <u>George Weston Limited</u> is the parent organization (owner) of Loblaw Companies. We can use a linking relationship (787 field) to assist users in finding the other company that may</p>

			<p>have relevant information for them.</p> <p><i>Example:</i></p> <p><i>787 = \$t Loblaw Companies Limited annual reports, \$d 1956, 1962-1996.</i></p>
976	Blank	Local field	<p>\$e Canadian Business History Collection Paper Reports</p> <p>\$9 local</p>
977	Blank	Local field	<p>\$a Insert PDF file names here.</p>