

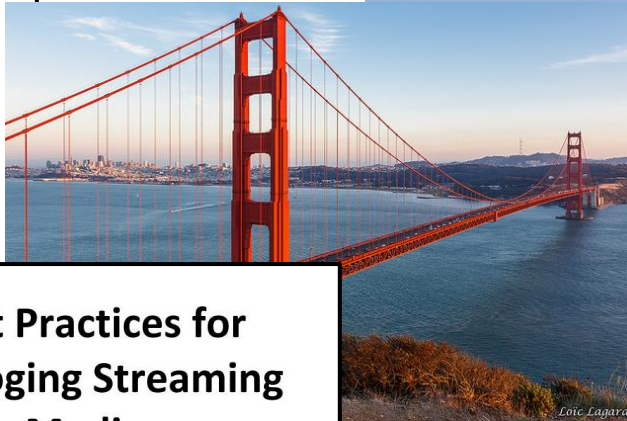
# 2015

## OLAC NEWSLETTER

### Best Practices for Cataloging DVD-Video and Blu-ray Discs

Using RDA and MARC21

Version 1.0  
January 2015



### Best Practices for Cataloging Streaming Media

Using RDA and MARC21

Version 1.0  
February 2015

Prepared by the Online Audiovisual Catalogers, Inc.  
Cataloging Policy Committee  
Streaming Media RDA Best Practices Task Force  
With additional contributions from...

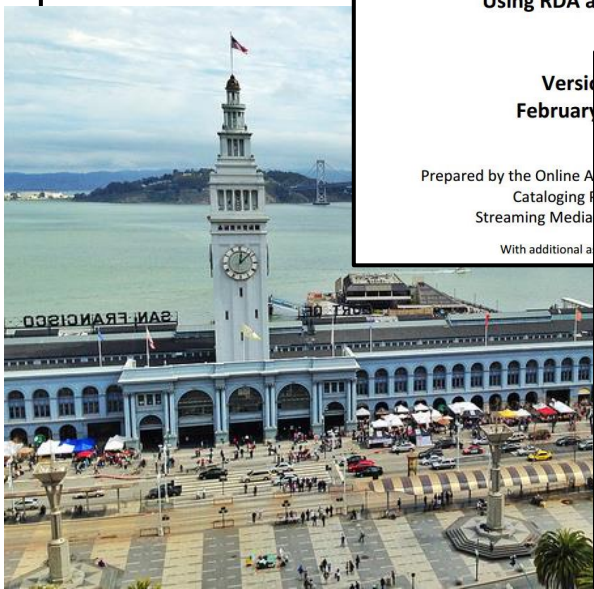
### Best Practices for Cataloging Video Games

Using RDA and MARC21

Version 1.0  
June 2015

\* incorporates the October 2014 RDA updates

Prepared by the Online Audiovisual Catalogers, Inc.  
Cataloging Policy Committee  
Video Game RDA Best Practices Task Force



Photos courtesy: [Loic Lagarde](#) (Golden Gate Bridge ) & [Markus Splering](#) (San Francisco Ferry Building)

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## THE OLAC NEWSLETTER

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Material for publication in the OLAC Newsletter should be sent to the appropriate editor. Persons wishing to review books should contact Richard Leigh and indicate their special interests and qualifications. For AV cataloging questions, contact Jay Weitz. Articles should be submitted in electronic form, using standard word-processing software, and consistent in length and style with other items published in the Newsletter. For further guidance, please check the [OLAC Newsletter Editorial Stylesheet](#). Persons wishing to nominate themselves or other OLAC members for *In the Spotlight* should contact Lisa Romano.

# From the Editor

Marcy Strong

I hope you were able to join us for ALA Annual in San Francisco, where OLAC sponsored many programs about audiovisual cataloging. You will find a summary of some of those programs and conference reports in this issue, including [CC:DA](#), [LC](#), [MAC](#), and the [OLAC Video Games Best Practices Report](#), to name a few. This has been a tremendous year for OLAC, and we're celebrating the release of three different RDA-based best practice reports. The [Best Practices for Cataloging DVD-Video and Blu-ray Discs Using RDA and MARC21](#), the [Best Practices for Streaming Media Using RDA and MARC21](#), and the [Best Practices for Cataloging Video Games](#) are now freely available to the cataloging community.

This issue also includes a [call for candidates in OLAC leadership](#). If you have ever considered giving back to OLAC by getting more involved with the organization, now is a great time. We are looking for candidates for the Vice President/President Elect and Secretary positions.

Don't forget to take some time to meet [Sandy Roe](#), who is profiled in this issue. Sandy is a long-time OLAC member and the editor of Cataloging & Classification Quarterly. We also have lots of [announcements from OLAC members](#) on publications, appointments and retirements!

## Contents

From the Editor .....	2
OLAC Executive Board .....	3
From the President .....	4
From the Treasurer .....	5
From the Secretary .....	6
From the Outreach Coordinator .....	16
Conference Reports from the 2015 Annual Conference .....	17
OLAC Needs YOU: Call for Candidates .....	32
News and Announcements .....	34
Members on the Move .....	35
In the Spotlight with... Sandy Roe .....	37
OLAC Cataloger's Judgment: Questions and Answers .....	39
News from OCLC .....	41

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## 2015-2016

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## From the President

### Stacie Trail



After an exciting year as Vice-President/President-Elect, I was honored to take the OLAC gavel from Marcia Barrett at the conclusion of OLAC's membership meeting at ALA Annual in San Francisco last June. Under Marcia's leadership OLAC had a fabulous year, with a successful OLAC conference in Kansas City, the publication of three best practices guides, and co-sponsorship of two pre-conferences at ALA Annual. I'm thrilled to be working with Annie Glerum, our new Vice-President/President-Elect, who brings to the office both deep cataloging knowledge and great enthusiasm for the organization. Annie has previously served as a member of CAPC and on several CAPC task forces, and I'm delighted to have her among OLAC's leaders.

I'm also pleased to welcome Autumn Faulkner to the OLAC executive board in the role of Treasurer/Membership Coordinator. This is an important role, and I know Autumn will do a great job. I would like express deep thanks to Heather Pretty, who passed the torch (or more accurately, the checkbook) to Autumn after having served OLAC capably and well for the past two years. OLAC is a stronger organization as a result of Heather's care and attention to detail.

We are also very fortunate that Mary Huismann has graciously agreed to serve one more year as CAPC Chair. CAPC's work under Mary's leadership has been extraordinary. CAPC will also have several new members this year, who I know will bring excellent fresh perspectives and skills to the work of the committee.

The need for the work that OLAC does has never been greater, as is clear from the extremely positive response of the greater cataloging community to the publication of OLAC's RDA best practices guides for DVD/Blu-ray, streaming media, and video games. I strongly encourage all OLAC members to become involved with the organization, whether by volunteering for a CAPC task force, assisting with conference planning, or running for the Executive Board. Some of the most rewarding professional experiences of my career have been in OLAC, and I would enthusiastically recommend active OLAC participation to any cataloger who would like to make real contributions to the profession while working with a wonderful group of people. I'm looking forward to another great year for OLAC. Please don't hesitate to contact me with any questions, concerns, or suggestions.

# From the Treasurer

**Heather Pretty**

## Treasurer's Report 4<sup>th</sup> Quarter FY15 Apr 1 - Jun 30, 2015



2015	4th Quarter	FY-to-Date
<b>Opening Balance</b>	\$12,826.01	\$12,826.01
<b>Income</b>		
Memberships	\$483.00	\$5,884.25
OLAC Conference Scholarship		\$101.00
Consistent discrepancy Quarterly Reports vs. Bank Account		\$195.20
Total Income	\$483.00	\$6,180.45
<b>Expenses</b>		
ALA Annual/MidWinter Conference Stipends	\$300.00	\$1,850.00
ALA Room Charge (Annual 2014/MW 2015)	\$140.00	\$280.00
ALA Association Membership	\$150.00	\$150.00
OLAC 2014 Conference Stipends		\$1,850.00
OLAC Board Dinners (Annual 2014, OLAC 2014, MW 2015)		\$624.74
OLAC Logo Work	\$250.00	\$387.50
BluHost for olacinc.org		\$263.76
SurveyMonkey Select Subscription		\$204.00
OLAC 2014 Conference Scholarship		\$1,000.00
OLAC 2014 Conference Reimbursement		\$100.00
Membership Reimbursement		\$53.25
Wild Apricot Subscription (Nov 2014-Nov 2015)		\$610.20
PayPal Fee	\$14.57	\$158.93
Total Expenses	\$854.57	\$7,532.38
<b>Closing Balance</b>		<b>\$12,454.44</b>
Personal Membership	268	As of June 22, 2015
Institutional Membership	37	
Total	305	

## From the Secretary

### Jennifer Eustis



### OLAC Executive Board Meeting

ALA Annual Conference

San Francisco, CA

Friday, June 26, 2015

**Present:** Marcia Barrett, Jennifer Eustis, Autumn Faulkner, Heidi Frank, Annie Glerum, Mary Huismann, Liz Miller, Jeremy Myntti, Heather Pretty, Marcy Strong, Stacie Traill, Jay Weitz

#### 1. Officer Reports:

- **President (Marcia Barrett):** We have a location and a local arrangements committee for the next OLAC Biennial Conference (2016) which will take place in Baltimore, MD. Thanks to the creation of a program planning committee, much of the burden of planning has been removed from the local arrangements committee.

The Board would like to welcome two new officers: Autumn Faulkner, incoming OLAC Treasurer, and Annie Glerum, incoming OLAC Vice President/President-Elect.

- **Vice President/President-Elect (Stacie Traill):** There is no report.
- **Treasurer (Heather Pretty):** In the fourth quarter of FY2015 or as of June 22, 2015, OLAC has a total of 305 members, 37 institutional and 268 personal. The closing balance as of June 22 was \$12,754.44. OLAC's recent expenses include the room charge for ALA Midwinter (\$140), the upcoming room charge for ALA Annual 2015, the association member fee (\$150), the second half of the fee for the work on the logo for MMK Design (\$125 for a total of \$250). Our total income was \$483 and expenses \$554.57. One of the more expensive costs was the microphone and projector for the Membership meeting at ALA Annual, which came to \$603.

The member management software, Wild Apricot, announced a fee increase. They are

offering OLAC the opportunity to pay for 2 years up front to lock in the subscription fee at its current price or to raise the subscription price from \$540/year to \$854.20/year. The Board has voted to pay the subscription fee up front for 2 years to lock in our subscription at its current rate. The Board has also asked the new Treasurer to investigate why Wild Apricot is charging OLAC tax on top of the subscription price.

- **Secretary (Jennifer Eustis):** An updated handbook and conference manual are up on the website in PDF format. The Board requested that a timeline and the requirements for conference proposals be added to the handbook along with cross references to each document. Further the Board asked that the reference to the stipend for the Production Editor be removed from the handbook.
- **Outreach/Advocacy (Jeremy Myntti):** OLAC is seeking any pictures from past conferences and the recent preconferences from ALA Annual 2015. As of today, pictures cover OLAC conferences back to 2002. Work continues on the creation of a Wikipedia page for OLAC. For the *Members on the Move* column, featured posts will be about the Board's new officers, new CAPC members and Bobby Bothmann's recent appointment.
- **Newsletter Editor (Marcy Strong):** Currently the Newsletter is being published only as a PDF without an HTML version. The HTML version is good for deep linking and this is functionality that the Board would like to keep. The Board will investigate a way of providing either an HTML version or a better way to deliver deep linking for the Newsletters.

## 2. Committee Reports

- **Web Steering Committee (Liz Miller):** The committee continues to advance the new OLAC website, which should be rolled out for ALA Midwinter.
- **CAPC (Mary Huismann):** CAPC is fully staffed this year! Later this fall, a call will go out for intern and full member positions. These positions will be appointed at Midwinter with terms to begin after Annual 2016.

Just a reminder - in an effort to remove barriers to participation, the Executive Board has approved reduction of the attendance requirement for full CAPC members. CAPC members must commit to attending one meeting at an ALA conference per year of their term. Mary will continue as chair for one more year and will identify possible candidates for CAPC chair for a term that will begin after ALA Annual 2016

### Task Force Reports

*Streaming Media Task Force, DVD/Blu-ray RDA Guide Task Force, Video Games RDA Task Force:* Best Practice Guides from all three of the groups have been approved and issued!



*New Task Forces:* The Video Games Genre Task Force has been reactivated. A joint task force with SAC working on game headings is underway. A joint task force with MLA to update the Playaways guide for use with RDA has been formed.

#### **Future Plans**

CAPC will be revisiting the process for keeping CAPC documents updated. This review will look at the current SMaCR process and propose any changes needed. CAPC will also be involved in positioning our documents for future use, such as inclusion in the RDA Toolkit.

- **MOUG Report (Mary Huismann):** Karen Peters has been appointed as the new OLAC/MOUG Liaison and will begin her term following this conference.
- **Archives (Liz Miller):** There is no report.

**OLAC CAPC Meeting**  
ALA Annual Conference  
San Francisco, CA  
Friday, June 26, 2015

Present: Cate Gerhard, Annie Glerum, Rosemary Groenwald, Jessica Hayden, Jeannette Ho, Mary Huismann (chair), Kelley McGrath, Julie Moore, Laurie Neuerburg, Patricia Ratkovich, Jessica Schoenberg, Trina Soderquist, Janis Young

Others attending: Bryan Baldus, Marcia Barrett, Ivan E. Calimano, Shi Deng, Thomas Dukleth, Jennifer Eustis, Heidi Frank, Kevin Furniss, Tina Gross, Caitlin Hunter, Beth Iseminger, Teresa Keenan, Andrea Leigh, Maria Mastromonaco, Jeremy Myntti, Jim Soo Nynn, Heather Pretty, Neil Robinson, Marcy Strong, Stacie Traill, Jay Weitz, Walt Walker

**1. Welcome and Introductions (Mary Huismann):**

**2. Approval of minutes:** The [minutes](#) were approved.

**3. Announcements:**

- We would like to say farewell to full CAPC members Stacie Traill, Joy Roberts, and Diane Robson, who are rotating off the committee after serving two terms, and to Laurie Neuerburg, Beth Cox, and Annie Glerum, who are leaving CPAC after one term. We also bid farewell to interns Patricia Ratkovich and Thomas Whittaker. We would like to welcome as full members for a 2-year term, Rosemary Groenwald, Julie Moore, and Thomas Whittaker; as full members for a 1-year term, Jessica Schomburg, Trina Soderquist, Jessica Hayden; as interns for a 1-year term, Amanda Scott and Lisa Romano.
- Marcia Barrett: OLAC is proud to present the **Nancy B. Olson Award to Mary Huismann** for her tireless work on documentation and RDA among others, her outstanding contributions in the field and her numerous achievements.



*Nancy B. Olson Awardee, Mary Huismann  
Photo courtesy: Jeremy Myntti*

**4. Liaison Reports:**

- **CC:DA Report (K. McGrath):** OLAC is going to propose for a third time that RDA should include a short list of common current terms on descriptions for optical discs and that this list could be supplemented by other resources. It was explained that JSC wanted these terms to be in the Open Metadata Registry, which they are in now. The optical disc term was broken out into 3 parts: physical type of disc (CD, Blu-ray, etc.), optical disc recording method (R. RW, etc.), and

optical disc data type or whether the disc has some type of formatting to go along with a stand-alone player. The aim is to improve the extensibility of RDA to formats such as moving images.

The machine readable data task force is working on a way to make RDA machine actionable. There is a quasi-proposal that is working with different measurements for extent such as an extended extent for pages, dimensions, or duration. Work on determining whether a difference exists between width and gage is also a part of this group in addition to clarifying what goes into the statements of responsibility. Also see the full [CC:DA Report](#).

- **MAC Report (C. Gerhart):** There is a recommendation to expand what can be added to the 257 field which is currently limited. A proposal will hopefully be done by Midwinter that will allow for use of autonomous or semi-autonomous territory names such as Hong Kong.

There is work being done to request that the language for the field 046 be modified so that this field contains the date of the film even if this date appears elsewhere in the record. At this time, it is unknown whether this would be an editorial change or require a proposal.

A proposal was brought forward concerning the 007 for physical sound recordings to broaden this field to encompass born digital sound recordings and those that have been digitized. MAC is looking at adding “v” to the 007 as well as “not applicable” codes.

There is a proposal to define the subfield w in the 670 field. This proposal would allow for the addition of an OCLC number with the citation or the LC number.

The music community has proposed a new definition for the format of printed music. Currently the format is in the field 250. The new field would have a controlled vocabulary and be a field where the format of the music would always go.

On Sunday, Stephen Folsom will present on a white paper on linked data and how to go about making best practices for getting linked data in our records. Also see the full [MAC Report](#).

- **LC Report (J. Young):** See full [Library of Congress \(LC\) Report](#)
- **OCLC Report (J. Weitz):** See full [OCLC Report](#)
- **MOUG Liaison Report (M. Huismann):**  
*New OLAC-MOUG Liaison:* Karen Peters (Bates College) is set to start her term after ALA Annual 2015.

*MOUG Conference:* The program last February with sessions and lightning talks is now available on the [MOUG website](#). The next MOUG conference will be in early March and take place in Cincinnati, OH.

*MOUG Website:* [MOUG has a new site](#). There are many new features such as social media. Content is still being migrated from the old site. Also see the full [MOUG Report](#).

- **AMIA Liaison Report (T. Ross):** There is no report.

## 5. Subcommittee, Coordinator Reports

- **Subcommittee on Maintenance for CAPC Resources (M. Huismann for R. Leigh):** This subcommittee is charged with reviewing the frequency and method of how CAPC resources are maintained and kept current. There is a document now that outlines this information. Any changes will be sent to the OLAC webmaster. There are 15 reviews that need to happen which will be split between the 5 committee members. Also see the full [SMaCR Report](#).
- **NACO/AV Funnel Coordinator Report (M. Huismann for P. Lisius):** See full [NACO report](#)

## 6. Task Force Reports

- **Audiovisual Materials Glossary Update Task Force (H. Frank):** The task force will try to complete the work on an administrative interface to add terms and work on Open Metadata Registry for new terms.
- **DVD/Blu-Ray Disc RDA Guide Task Force (M. Huismann):** The final task of this task force is to incorporate the changes from the April RDA toolkit update for a version 1.1 of the guide.
- **Video Games RDA Task Force (G. de Groat):** Feedback was received and incorporated into the final version, which will be added to the OLAC website soon. This task force will plan on coming together in the future for revisions.
- **Joint SAC/OLAC Games Preferred Title Task Force (G. de Groat):** This task force has developed a controlled vocabulary for games. The task force had encountered some issues with terminology such as how to deal with franchises. This work focuses on physical games and the Task Force hope to have a paper completed soon. Also see the full [SAC/OLAC Games Preferred Title Report](#).
- **Video Games Genre Task Forces (C. Gerhart):** This task force is working on writing a proposal to suggest genres for video games, which should be finished by Midwinter and ready to submit to LC.

- **Joint MLA/OLAC Playaways RDA Best Practices (M. Huismann):** Rob Freeborn (Penn State) has been appointed chair of this task force. Jay Weitz will be the advisor. The goal of the task force is to update the playaway guide for use with RDA.

## 7. New Business

- **A Style guide for CAPC Publications: A Progress Report (M. Huismann & T. Keenan):** While working on the Streaming Media and Blu-ray guides, the notion of having a style guide for CAPC publications was brought up. Previously, CAPC documents had an inconsistent look and formatting. A style guide was borrowed from MLA and applied to the guides with good feedback. We would like to also ensure CAPC documents are accessible and have relied on T. Keenan's recommendations to help documents be better read by screen readers.
- **Discussion: Best Practices for the Best Practices: How do we keep documents up-to-date?** We will also revisit the Subcommittee for Maintenance of CAPC Resources (SMaCR) review process.

The current procedure is to review documents on a 5-year cycle. This doesn't make sense with RDA. We are looking for ideas to streamline this process. One idea is to review RDA documents when there are changes to the RDA Toolkit. These changes occur on a regular quarterly basis, although substantial changes seem to occur only twice per year. Would it be possible to appoint a person who would watch for these types of changes? CAPC is now the consultative group for RDA revision proposals and could be tasked with this action. For major revisions, CAPC could create ad hoc committees when necessary and be involved in the current review process. It was suggested that there be one review process for RDA documents while others fall under the 5-year review cycle. CAPC will continue to investigate this.

- **Discussion: Positioning the Best Practices documents for future use (M. Huismann)**

How do we want to position CAPC documents for future use such as including them in the Toolkit? Part of the feedback from the recent CAPC guides was the question of when these guides would appear in the Toolkit. Jay Weitz had previously suggested creating one master reference document with all the guides. Should we consider one large document? This begs the question of what such a document would look like. Would the guides be totally integrated or would it just be one document with the guides, one after another? It may be easier to have all of this information in one document to harmonize content as well as remove multiple instances of basic information that could be put in just one place. This will be investigated.

Adjournment

## OLAC Membership Meeting

ALA Annual Conference

San Francisco, CA

Saturday, June 27, 2015

Present: Marcia Barrett, Jennifer Eustis, Autumn Faulkner, Cyrus Ford, Heidi Frank, Cate Gerhart, Annie Glerum, Greta de Groat, Tina Gross, Eric Kaltman, Liz Miller, Julie Moore, Jeremy Myntti, Heather Pretty, Ned Robinson, Marcy Strong, Stacie Traill

### 1. Welcome and Introductions

### 2. Reports

- **President's Report (Marcia Barrett):** The Nancy B. Olson Award was presented last night at the CAPC meeting to Mary Huisman for her numerous accomplishments and achievements.

The 2016 OLAC Biennial Conference will be held in Baltimore, MD. If you are interested in helping out either the local arrangements committee or the OLAC planning committee, let the Board know.

The Board would like to welcome two new officers: Autumn Faulkner, incoming OLAC Treasurer, and Annie Glerum, incoming Vice President/President-Elect.

- **Vice President's Report (Stacie Traill):** There is no report.
- **Treasurer (Heather Pretty):** In the fourth quarter of FY2015 or as of June 22, 2015, OLAC has a total of 305 members, 37 institutional and 268 personal. The closing balance as of June 22 was \$12,754.44. OLAC's recent expenses include the room charge for ALA Midwinter (\$140), the upcoming room charge for ALA Annual 2015, the association member fee (\$150), the second half of the fee for the work on the logo for MMK Design (\$125 for a total of \$250). Our total income was \$483 and expenses \$554.57. One of the more expensive costs was for the microphone and projector for the Membership meeting at ALA Annual, which came to \$603.

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- **Secretary (Jennifer Eustis):** An updated handbook and conference manual are up on the website in PDF format. The Board requested that a timeline and the requirements for conference proposals be added to the handbook along with cross references to each document. Further the Board asked that the reference to the stipend for the Production Editor be removed from the handbook.
- **Outreach/Advocacy (Jeremy Myntti):** OLAC is seeking any pictures from past conferences and the recent pre-conferences from ALA Annual 2015. As of today, pictures cover OLAC conferences back to 2002. Work continues on the creation of a Wikipedia page for OLAC. For the Members on the move column, featured posts will be about the Board's new officers, new CAPC members and Bobby Bothmann's recent appointment.
- **CAPC/MOUG (Marcia Barrett for Mary Huisman):** CAPC is fully staffed this year! Later this fall, a call will go out for intern and full member positions. These positions will be appointed at Midwinter with terms to begin after Annual 2016.

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#### **Future Plans**

CAPC will be revisiting the process for keeping CAPC documents updated. This review will look at the current SMaCR process and propose any changes needed. CAPC will also be involved in positioning our documents for future use, such as inclusion in the RDA Toolkit.

### **3. Other**

- **OLAC Logo (Liz Miller):** OLAC has a new logo that is now on the test web site. The new website uses the colors of the logo which are appropriate also for those with visual disabilities. The new website will be rolled out at ALA Midwinter.

#### 4. Program

- **Video Game Best Practices Guide (Greta de Groot):** This task force has developed best practice guidelines specific to games based on the work of [GAMECIP controlled vocabularies](#). The task force dealt primarily with physical media but does reference some online games as examples. The task force recommended treating games as provider neutral. See full [Video Games report](#).
- **Controlled Vocabulary for Computer Platforms (Eric Kaltman):** The Game Metadata and Citation Project (GAMECIP) is a multi-year funded joint initiative to improve library and institutional practice for computer games. The controlled vocabulary developed by GAMECIP can be found on the online [Metadata Registry](#).

#### 5. Passing the Gavel

The OLAC gavel officially passed to Stacie Traill as President of OLAC.



*Stacie Traill accepts the gavel from outgoing OLAC President, Marcia Barrett  
Photo courtesy: Jeremy Myntti*



## From the Outreach Coordinator

**Jeremy Myntti**



Thank you to Debbie Ryszka (Copy Cataloging Unit Coordinator at the University of Delaware) for sharing some of her photos from the 2010, 2012, and 2014 OLAC Conferences to add to the collection of OLAC photos on Flickr. We now have photos from every OLAC Conference from 2002 through 2014. If you have photos from any OLAC Conference, especially if they are prior to 2002, please share them with us. [Contact me](#) and I will help you send the files to us to load in Flickr. We would also like to have photos of other OLAC events such as those at the ALA Annual Conference and Midwinter Meetings or any event where you may have shared an OLAC resource in a presentation.

If you haven't seen the OLAC photos on Flickr yet, [go and take a look](#). You may even find yourself or one of your colleagues at a past OLAC event.

Thank you to Scott Dutkiewicz (Metadata and Monographic Resources at Clemson University) for promoting OLAC at the Annual Conference of the Church and Synagogue Library Association, held at the University of North Texas, July 29-31, 2015. Scott's presentation at this conference, titled "3 R's of RDA," gave attendees a refresher in the principles of RDA, with an emphasis on audiovisual material. One of the resources that Scott used in his presentation was the recent CAPC Publication "Best Practices for Cataloging DVD-Video and Blu-ray Discs Using RDA and MARC21."

Two OLAC members, Jay Weitz (Senior Consulting Database Specialist at OCLC and OLAC/OCLC Liaison) and Keith Knop (Associate Music Cataloger at Florida State University), conducted a workshop for ALA/MLA titled "Cataloging Music Audiovisual Materials Using RDA" on August 26, 2015. During this workshop, several CAPC resources were demonstrated such as "Best Practices for Cataloging DVD-Video and Blu-ray Discs Using RDA and MARC21," "Best Practices for Cataloging Streaming Media Using RDA and MARC21," and "Video Language Coding: Best Practices."

We would love to know if you have promoted OLAC or used any OLAC resources in any presentations that can be featured in the quarterly newsletter. To submit any outreach activities or if you have an idea for a way to help us with outreach for OLAC, please contact [Jeremy Myntti](#).

# Conference Reports

## from the 2015 ALA Annual Conference

Jan Mayo, Column Editor

### **Committee on Cataloging: Description and Access (CC:DA) Report**

*submitted by Kelley McGrath*

OLAC had one proposal on the CC:DA agenda at Annual. This is our third attempt to incorporate elements describing the characteristics of optical discs into RDA. The [proposal discussed at CC:DA](#) has been submitted to the [JSC for their November meeting](#).

A JSC working group has prepared [draft guidelines for proposing new content and carrier categories](#) in RDA. These describe how to map proposed categories to underlying values from the RDA/ONIX Framework for Resource Categories. This provides a path for proposing more specific categories than those that currently exist in RDA. In order to be approved by the JSC, our proposed elements will also need to map to values in the RDA ONIX framework.

We proposed three new characteristics:

- Optical disc physical standard describes the type of physical disc, such as CD, DVD or Blu-ray. This is going forward with the name Optical disc storage format.
- Optical disc recording method refers to the method used to write data to an optical disc. The basic values are stamped and burned. The specific type of burned disc, such as CD-R or DVD+R, can also be identified. This is going forward as a sub element of Production method, Production Method of Optical Disc.
- Optical disc data type includes three high-level categories: music, video and data. Music and video data types are used for specialized disc standards that are designed to play on standalone players, such as CCDAs and DVD video. Data is used for everything else, including applications, games, text and images, and refers to discs that contain files that require a general-purpose computer and often require specialized software. This element was particularly intended to make RDA's distinction between "computer" discs and audio and video discs clearer. We were unable to agree on a mapping to the RDA/ONIX Framework for Resource Categories that is likely to be acceptable to the JSC so this element is not included in the final proposal.

OLAC was asked at the 2014 ALA Annual CC:DA meeting to add the proposed optical disc vocabularies to the Open Metadata Registry. Earlier versions of these vocabularies are posted in the [Open Metadata Registry sandbox](#). Thank you to Dominique Bortmas and Yu-Hung Lin for help with inputting the terms.

CC:DA has made a [proposal that clarifies the sources for statements of responsibility](#) when sources other than the preferred source contain fuller or additional statements. The proposal suggests that additional statements should be added without square brackets. It also suggests that the form on the preferred source should be given even if there is a fuller form of the statement elsewhere on the resource. Fuller forms and information about sources of information may be given in notes if it is thought useful.

The Task Force on Machine-Actionable Data Elements in RDA Chapter 3 prepared a [lengthy discussion paper](#). They would like to create or revise instructions for: Measurements, Extent of the Carrier, Pagination and Foliation, Dimensions, Extent of the Content, and Duration. One of their proposals, in the interest of consistency, is to change the measurements of cartridges and cassettes from length x width to height x length. In practice, I believe that we would record the same dimensions that we currently record, only in reverse order. It appears to me that the existing instructions [orient that cartridge or cassette](#) flat on a surface and omit height as uninteresting. The proposed change would stand the cassette on its [long side](#).

Gordon Dunsire, the JSC chair, gave a [presentation on upcoming changes to the RDA governance structure](#). The governance structure needs to be updated to reflect the international reach of RDA. They also want to include new communities, such as museums and archives. It is anticipated that much of the future work of the JSC will be done by working groups. The transition to the new structure will begin this year and end before 2020. ALA will not have its own representative to the new RDA steering committee. Instead, there will be a single representative for the North American region. CC:DA members expressed much concern that ALA's influence will be diluted in the new structure. ALA is the largest constituency and traditionally one of the most active.

## **Joint OLAC/SAC Task Force on Preferred Titles for Games Report**

*submitted by Greta de Groat*

The Joint OLAC/SAC Task Force on Preferred Titles for Games was formed in March to address several issues regarding practices for preferred titles and authorized access points for games that came up during the work on the Video Game Best Practices. These are: choice of qualifier, form of preferred title for games in franchises, treatment of franchises, and game titles currently residing in LCSH. There are also issues with the terminology of video/computer/electronic games. At LC's request, we are also including physical games. We are currently working on a white paper for LC outlining the issues and our recommendations, along with a plan of action and impact on existing records. We hope to hand this over to LC soon.

## Library of Congress (LC) Report

*submitted by Janis L. Young*

**Personnel Changes.** Dr. James H. Billington, the Librarian of Congress, announced to Library staff on June 10, 2015, that he intends to retire effective Jan. 1, 2016. Dr. Billington is the 13th Librarian of Congress. He began his tenure at the Library in 1987 and will retire with a total of 42 years of federal government service.

**BIBCO Music Funnel.** The PCC BIBCO Music Funnel was formally established after the approval of PCC Steering Committee in April 2015. The Music Funnel was the result of efforts by the music community in the past year. The BIBCO Music Funnel is joining the long-established NACO Music Project as well as the SACO Music Funnel. The Funnel will be instrumental in helping develop PCC best practices for music cataloging.

**BIBFRAME.** In the first half of 2015, work was underway to create a simple system to support an LC cataloger experiment with creating BIBFRAME descriptions. The experimental system will be seeded with a conversion of the Library's MARC bibliographic records and the reconfiguration of MARC title authority records to BIBFRAME work descriptions. The questions being explored are intentionally kept simple: Can catalogers input native BIBFRAME? Is the BIBFRAME Work/Instance dichotomy clear and useful? Do type-ahead and other "helpers" work? Major challenges will be the useful conversion of the MARC file and implementation of adequate search in the new file model.

The BIBFRAME system is being developed on a MarkLogic platform and will make heavy use of the Linked Data vocabularies the Library has made available to the public since 2009. This pilot is expected to begin in July and continue for at least 3 months. The pilot uses the core RDF-based vocabulary that has been kept relatively stable since early 2014. The pilot is expected to yield points for the revision of the vocabulary and many answers and questions about the adaptability of the library data to the Linked Data environment.

**PCC RDA Authorities Phase 3 Task Group.** Staff at LC continue to work with Gary Strawn (Northwestern University) and the PCC Phase 3 RDA Authorities Task Group to prepare for the final phase of recoding all eligible name authority records in the LC/NACO Authority File with the appropriate RDA indicia. Phase 3B is projected to take place during the summer of 2015, with the exact date yet to be determined. The two major tasks to be achieved in Phase 3B include: re-coding AACR2 authority records as RDA when 1XX fields contain no RDA-contrary elements, and most importantly, adding 024 fields for ISNIs (the International Standard Numerical Identifier) to names in the LC/NAF that match the OCLC-Leiden supplied list of ISNIs (these additions may occur on records already coded as RDA).

As part of this collaboration with OCLC-Leiden, LC and the British Library have agreed to a workflow for future maintenance in order to assure that all newly assigned ISNIs will be added. As reported earlier, Phase 3B will not include any changes to name authority field 1XX. Besides changes in the two major areas, other changes to name authority records will include: replacing obsolete indicators in 1XX, 4XX

and 5XX fields with blanks; adjusting Leader/17 appropriately; adjusting 008/39 to remove obsolete data; supplying qualifiers for initialisms and acronyms in 410 fields, when that can be done reliably; evaluating contents of 370 field for compliance with LC/NAF or LCSH, etc.; generating 046 field from \$d or 670 for personal names, and formulating 046s with hyphens & adding \$2 edtf. This last enhancement was added as a result of cataloger discussions on PCClist and the subsequent deliberations of the PCC Standing Committee on Standards, the Network Development and MARC Standards Office at LC, and the Phase 3 Task Group that determined that adopting the Extended Date and Time Format would provide greater efficiency for catalogers as they no longer will need to remember when to use hyphens and the subfield \$2, and when not to use it. Some examples of what the 046 will look like follow:

046## \$f [1666, 1667] \$2 edtf  
046## \$g [1268-11-28,1268-11-29] \$2 edtf  
046 ## \$f 1936-09-07 \$g 1959-02-03 \$2 edtf  
046## \$f 1946 \$2 edtf

Documentation (DCM Z1 and LC-PCC PSs) will be updated in accordance with this best practice; catalogers should wait for the documentation revisions before using the new edtf formulation. Detailed descriptions of the changes in the upcoming Phase 3B are contained in the [Task Group's report](#).

**Redefined Coding in the 046 Field of Authority Records.** MARC Update no. 20 (April 2015) was issued recently, and in that release 046 subfields \$s and \$t have been redefined and subfields \$q and \$r have been added for use with corporate bodies. Please continue to use the former definitions for \$s and \$t (RDA's corporate establishment date and termination date, respectively) until the new values are implemented. Remember that catalogers may not use any new MARC fields in a NAR contributed to the LC/NAF until LC gives the green light. LC works with the NACO-nodes to determine if all are ready to exchange the fields, successfully tested, and announcements have been made with a start date. LC has a project on the back burner to programmatically handle the change from \$s and \$t to \$q and \$r after Phase 3B.

**RDA Relationship Designators in Bibliographic Records.** LC's RDA catalogers will implement the new "Training Manual for Applying Relationship Designators in Bibliographic Records" produced earlier this year by the PCC Standing Committee on Training. While many LC catalogers already provide relationship designators that meet or exceed the PCC requirements (relationship designators for all creators), all LC catalogers will be asked to do so beginning on July 1, 2015. The PCC continues to work on guidelines for the use of relationship designators in authority records.

**Music Genre/Form Project.** The music genre/form project is a partnership undertaken by PSD and the Music Library Associations' Bibliographic Control Committee, Form/Genre Task Force. PSD approved 567 genre/form terms for music in February 2015. The Task Force and PSD are continuing to discuss approximately 100 more terms. As the issues with those terms are resolved, proposals for them will be published and approved on future Tentative Lists according to the standard practice.

**Literature Genre/Form Project.** The literature genre/form project is a collaboration undertaken by PSD and the ALA/ALCTS Subject Analysis Committee's Subcommittee on Genre/Form Implementation, which formed the Working Group on LCGFT Literature Terms.

In May 2015, PSD approved approximately 230 genre/form terms for literary works, which was about half of the proposals that appeared on Tentative List 1515. The [list of terms that were approved](#) may be viewed online. Review of the remaining proposals was postponed due to staffing and workload levels within PSD. Proposals from Tentative List 1515 that were not reviewed now appear on [Tentative List 1516](#), and will be approved in September 2015.

**Religion Genre/Form Project.** The religion genre/form project is a collaboration between PSD and the American Theological Library Association. [Tentative List 1518](#), which comprises the initial terms for religious materials, is available. It will be approved in September 2015. Comments on the proposals may be sent to [Janis L. Young](#) by August 31, 2015.

**Proposals for New and Revised Genre/Form Terms.** PSD is not currently accepting proposals for new and revised terms in the areas of music, literature, religion, or the "general" terms (e.g., handbooks, dictionaries), but continues to accept proposals in the areas of moving images, non-musical recorded sound, cartography, and law.

**LC Implementation of New Genre/Form Terms.** The Music Division and the Motion Picture, Broadcasting and Recorded Sound Division, which catalog music, books on music, and musical sound recordings, began to implement genre/form terms in new cataloging in April and May 2015, respectively. Library of Congress' Acquisitions and Bibliographic Access Directorate, which catalogs most of the textual works acquired for the Library's general collections, has not yet decided when it will implement the "general," religion, and literature genre/form terms.

**Library of Congress Demographic Group Terms (LCDGT).** LCDGT will be used to describe the creators of, and contributors to, resources, and also the intended audience of resources. It will be created and maintained by the Policy and Standards Division, and be distinct from the other vocabularies that are maintained by that division.

A [Tentative List](#) comprising the pilot vocabulary and the guiding principles under which it was developed were made available for public comment in May 2015. The three goals of the LCDGT pilot were to indicate how LC intends to structure the vocabulary, provide consistent patterns for future development, and generate a discussion that will help inform LC as it fine-tunes the guiding principles. There was no attempt at comprehensiveness within the vocabulary, but representative terms from each category were included. Some terms were incorporated because they illustrate a particular problem (e.g., a conflict situation) and the solution to that problem.

The pilot vocabulary was revised and approved in June 2015, and PSD thanks all those who provided their insights. PSD will now undertake a second phase of development and enhance LCDGT's scope and

coverage. Since the initial development of LCDGT will take place within PSD, proposals for new and revised terms are not being accepted at this time.

PSD recommends that libraries wait until the second phase of development is completed before widely implementing LCDGT in cataloging; the vocabulary is not yet robust enough to support general use. Libraries that choose to implement immediately do so at their own risk.

**Programs on LCGFT, LCMPT, and LCDGT at ALA.** Janis L. Young, a senior subject policy specialist in PSD, will present two programs on LC genre/form, demographic group, and medium of performance (LCMPT) terms at the ALA Annual Conference.

*Coming to Terms with the New LC Vocabularies: Genre/Form (Literature, Music, General), Demographic Groups and Medium of Performance.* The Library of Congress, ALCTS/SAC and MLA have collaborated on new vocabularies to provide genre/form access to literature, music, and "general" works as well as controlled lists of demographic terms and medium of performance terms; new MARC fields are in place for attributes of works including audience, creator characteristics, and time period of creation. The presenters will describe the context, development, and practical application of these new vocabularies and fields. This program is presented in cooperation with Hermine Vermeij, team leader of the subject specialist catalogers, UCLA, and Adam Schiff, principal cataloger, University of Washington Libraries on Monday, June 29, 2015, 1-12:30 p.m., at the Moscone Convention Center, Room 2003(W).

*Enhancing Access To Literary Works For Children: LC's Genre/Form and Audience Terms.* This Saturday program will introduce participants to *Library of Congress Genre/Form Terms for Library and Archival Materials* (LCGFT) and *Library of Congress Demographic Group Terms* (LCDGT) and explain how to use them to catalog and provide access to materials for children. LCGFT and LCDGT will be placed into the context of existing practice, and the relationships among subject headings, genre/form terms, and demographic terms will be discussed. Real-world examples and hands-on exercises will be provided. Saturday, June 27, 8:30-10 a.m., Moscone Convention Center, Room 2016(W).



## **MARC Advisory Committee (MAC) Report**

*submitted by Cate Gerhart*

This report provides information of interest to the OLAC constituency from the June 2015 MARC Advisory Committee (MAC) meetings in San Francisco, California. The [complete list of topics discussed](#) is also available online.

### **Proposal No. 2015-07: Extending the Use of Subfield \$0 to Encompass Content, Media and Carrier Type**

This proposal passed as amended. This proposal requested the addition of \$0 to the 33X block of the both Authority and Bibliographic Formats. The inclusion of this subfield will bring the 33X block into alignment with the 34X block and will be beneficial to the linked data applications. The amendment to this proposal was to also add the \$0 to the 33X in the Holdings Format.

### **Proposal No. 2015-08: Recording RDA Format of Notated Music in the MARC 21 Bibliographic and Authority Formats.**

This proposal passed as amended. This proposal adds Field 348 to the Bibliographic and Authority Formats. The RDA element “Format of Notated Music” currently maps to a 500 field but it is felt that a separate tag would allow for controlled lists and codes to be used. This field would be unlike the 250 since it is not a transcribed field. It might duplicate information found in genre headings, but the decision on whether to use the 348 or the 655 or both will be left up to individual institutions, based on the needs of the local user community and system capabilities or limitations. It was agreed to amend the proposal to add the “field definition and scope” currently appearing the 336, 337 and 338 indicating that terms and codes from different vocabularies are to be recorded in separate occurrences of the field.

### **Proposal No. 2014-09: Defining 670 \$w (Bibliographic record control number) in the MARC 21 Authority Format**

This proposal passed. This proposal add the \$w to the Authority Format. It lets the cataloger add the OCLC number (or other record control number like LC number) to the 670 in an authority record. This will very nicely take much of the guesswork out of identifying what bibliographic record was used as the basis for the entity in the 1XX field.

### **Discussion Paper No. 2015-DP02: Coding 007 Field Positions for Digital Sound Recordings in the MARC 21 Bibliographic Format**

This discussion paper looks at enhancements to the 007 for sound recordings. Specifically, it looks at how the 007 could be revised to reflect more current materials including digital recordings. The proposal that will be returning at Midwinter 2016 will address adjusting the definition of sound recording to apply to both physical and digital media, define a “specific materials designation” (007/01) for remote sound

recordings, and address changes to the rest of the 007 positions to support the addition of digital sound (both physical and remote) to this field.

Since this change is so basic to many our cataloging duties, I'd be happy to [hear any ideas](#) any of you have for how this might be accomplished. I will send your ideas to the Canadian Committee on Metadata Exchange who wrote this discussion paper and will be putting forward the proposal.

### **URIs in MARC: A Call for Best Practices**

In addition to the normal proposals and discussion papers, MAC also discussed a “white paper” written by Steven Folsom (Discovery Metadata Librarian at Cornell University) entitled “[URIs in MARC: A Call for Best Practices](#).” This white paper looked at the lack of standards when it comes to capturing URIs in bibliographic and authority records. While MAC determined that it might not be the best “group” to decide and implement these standards, MAC did support the need for them and gave Steven extensive feedback. We also found a number of places where MARC could be improved to help with this standardization and Steven will be working with PCC to develop a discussion paper for Midwinter looking at a number of these enhancements.

## **MOUG/OLAC Liaison Report**

*submitted by Karen A. Peters*

### **New Officers**

Last November, the MOUG membership elected Casey Mullin to the position of MOUG Vice Chair Elect, and Tomoko Shibuya to that of MOUG Treasurer Elect. Casey and Tomoko assumed their new positions at the end of the MOUG annual meeting last February, and will become Chair and Treasurer, respectively, at the end of 2016 annual meeting next March.

### **2015 Papakhian Travel Grant Awards**

Three Papakhian Travel Grant awards were made to support attendance at the 2015 MOUG annual meeting held in Denver last February. The Awardees are:

- Anna Alfeld LoPrete (Indiana University)
- Colin Bitter (Westminster College Choir of Rider University)
- Sophie Rondeau (Syracuse University)

### **NACO-Music Project Moved from MOUG to MLA**

The NACO-Music Project (NMP) has made an administrative move from MOUG to the Music Library Association, where it now falls under the oversight of the Cataloging and Metadata Committee (MLA-CMC) alongside the other PCC music funnels (BIBCO and SACO). It is expected that the closer connection between NMP and MLA-CMC will facilitate ongoing work with cataloging guidelines and policies.

### **Annual Meeting 2016**

MOUG's 2016 annual meeting will be held on March 1-2, 2016 at the Hilton Netherland Plaza Downtown in Cincinnati, Ohio, in conjunction with the Music Library Association's 2016 annual meeting. More information will be forthcoming in my next report.

### **New Website**

If you haven't had a chance to do so yet, please be sure to visit MOUG's new website! Note that the address hasn't changed: <http://musicocclusers.org/>.

## NACO-AV Coordinator's Report

*submitted by Peter H. Lisius*

- 1) Contributions to the funnel
  - a. Independent contributors (institutional):
    - i. Carnegie Library
    - ii. Kent State University
    - iii. University of Akron (Personal names)
  - b. Independence-seeking mode
    - i. Illinois State University (June 2014 – present)
    - ii. University of Alabama (Personal names;
    - iii. University of Akron (Corporate names; April 2014 – present)
  - c. Possible/probable future contributors to the NACO-AV project:
    - i. University of North Carolina—Wilmington
    - ii. University of South Carolina—Columbia
    - iii. Clemson State University
    - iv. University of Nevada—Las Vegas
    - v. Loyola Marymount University
    - vi. Access Educational Media
    - vii. Rock & Roll Hall of Fame Library
    - viii. University of Missouri—Kansas City
    - ix. Kansas State University
  - d. Stats from PCC site (called “OLAC” on the page)
    - i. [FY 2014](#)
      1. New names: 680
      2. Changed names: 374
    - ii. FY 2015 (Through February 2015; March-May 2015 not posted)
      1. New names: 223
      2. Changed names: 99
  - e. Current reviewers: Chuck Herrold (Carnegie Library); Peter Lisius (Kent State)
- 2) NACO-AV workshop, Kansas City, MO (October 2014)
- 3) Goals
  - a. Next FY (2015-16)
    - i. Officially document the method by which an individual gets independence in the NACO-AV funnel (to be placed on NACO-AV pages on OLAC website)
    - ii. Officially document how one becomes member of the NACO-AV (currently addressed in the FAQ section; I think this would be better on its own).
  - b. Long term
    - i. Increase number of reviewers
    - ii. Find a new assistant coordinator
    - iii. Create a “best practices” document for creating NACO-AV NARs; possibly follow the work of the NMP as a model.

- iv. Update/reevaluate “[AV Authority Tools](#)” page on the OLAC website; contact individuals who originally compiled the document
- v. Official incorporate/offer training in the contribution of motion picture/television program/radio program title NARs (130s) into the work of the funnel.

## **OLAC Video Games Best Practices Report**

*submitted by Greta de Groat*

The Video Games Best Practices Task Force has taken the feedback that we got on our draft document over the winter and spring and incorporated it into the final version. This should be up on the OLAC website soon. I'd like to thank all the task force members and advisors for their hard work! Though we were scheduled to sunset this month, there is going to be a need to continue revising the document as RDA rules and LC policies keep evolving. We are currently planning to come together on an as-needed basis when revisions are necessary. We gave only interim guidelines on genre while we await the work of the Game Genre Task Force, and a Joint OLAC/SAC Task Force on Preferred Titles for Games has been formed to work on various game title issues.

I'd also like to thank the Game Metadata and Citation Project, aka GAMECIP, for supporting the work of myself and Marcia Barrett and for giving feedback. Aside from the best practices themselves, an outcome of this project has been the development of controlled vocabularies for game platforms and media.

I'll be giving a presentation on the best practices at the Membership Meeting on Saturday, and I'll be joined by Eric Kaltman of the GAMECIP project, who will present on the controlled vocabularies. Necessary future steps to encourage adoption will be to apply for inclusion in the MARC source codes lists and propose the addition of \$2 and \$0 to MARC 753 field.

## **Subcommittee on Maintenance for CAPC Resources (SMaCR) Report**

*submitted by Richard N. Leigh*

The [Subcommittee on Maintenance for CAPC Resources \(a.k.a. SMaCR\)](#) “is charged with identifying those CAPC resources that need ongoing maintenance, determining how often and who will update them, and examining the structure of the CAPC web pages and making recommendations for reorganization (in collaboration with [Teresa Keenan], the OLAC Webmistress).”

SMaCR submits a report “whenever CAPC meets.” SMaCR’s [General Operating Procedures](#) specify that this report should contain: “What resources are tagged for review; What resources have been reviewed; What resources have been updated; & What resources have been archived”.

In the first half of 2015 (See [Addendum](#) for detailed list of resources):

- 15 resources are currently tagged for review.
- 0 resources completed their reviews.
- 0 resources were substantially updated.
- 2 resources were archived.
- 1 task force was added to the list of Active Task Forces & Subcommittees.
- 1 task force was moved to the list of Past Task Forces & Subcommittees (from the Active list).
- 1 addition was made to the Cataloging Tools and Training Documents section.
- 0 additions were made to the Reports and Thought Papers section.

SMaCR keeps a spreadsheet with information about the content and organization of the CAPC section of the OLAC website. That spreadsheet has been updated to reflect the most recent round of changes to the CAPC website. Future lists of requested changes will be sent to OLAC Webmistress Teresa Keenan, with the Chair of CAPC being copied.

The last six months of 2015 look to be a busy time for SMaCR. Management of the 15 reviews will be split between SMaCR’s five members (John Baga, Cyrus Z. Ford, Richard N. Leigh, Elizabeth A. Morgan, Heather Pretty). Upkeep of the website will also be divided between all 5 SMaCR members.

Please direct all questions about SMaCR to its chair, [Richard N. Leigh](#). Thank you for your time!

## **Subcommittee on Maintenance for CAPC Resources (SMaCR) Addendum Report** *submitted by Richard N. Leigh*

### **Fifteen resources are currently under review:**

1. [Authority Tools for Audiovisual and Music Catalogers: An Annotated List of Useful Resources](#)
2. [Library of Congress Genre/Form Terms for Library and Archival Materials - LCGFT, Moving Image Genre-Form Headings .](#)
3. [Source of Title Note for Internet Resources](#)
4. [Summary Notes for Catalog Records](#)
5. [Rationale for Cataloging Nonprint Collections](#)
6. [Report of the FAQ/Best Practices Project Task Force : Preliminary report](#)
7. [General Material Designations in the Twenty-First Century : Results of a Survey by Jean Weihs](#)
8. [FRBR, Facets, and Moving Images : A Literature Review](#) (July 31, 2010 version)
9. [Faceted, Work-Centric Moving Image Discovery Interface Demonstration](#)
10. [Moving Image Work-Level Task Force Report and Recommendations](#) (7 documents, treated collectively)
11. [OLAC/CAPC Task Group on Treatment of Non-Human Entities, etc.](#)
12. [OLAC/CAPC White Paper on the Treatment of Non-Human Entities, etc. :](#)
13. [Online Audiovisual Catalogers \(OLAC\) Statement on OCLC's Proposed Policy for Use and Transfer of Worldcat® Records](#)
14. [OLAC/CAPC Expert Panel Task Force Final Report](#)
15. [Playaways and RDA : Summary of relevant sections from RDA Chapters 3, 6, and 7](#)

### **Two resources were recently archived:**

1. [Guide to Cataloging DVD and Blu-ray Discs Using AACR2r and MARC 21](#) (2008 Update)
2. [Best Practices for Cataloging Streaming Media](#)

### **One task force was added to the list of Active Task Forces & Subcommittees:**

- [Joint MLA/PLAC Playaways Task Force](#)

### **One task force was moved to the list of Past Task Forces & Subcommittees:**

- [RDA Revision Proposals Task Force](#)

### **One addition was made to the Cataloging Tools and Training Documents section:**

- [Best Practices for Cataloging DVD-Video and Blu-ray Discs Using RDA and MARC21](#) : Version 1.0 : January 2015



## OLAC Needs YOU: Call for Candidates

OLAC is seeking nominations for the offices of OLAC **Vice President/President Elect** and OLAC **Secretary**. Anyone interested in a challenging leadership position and an opportunity to learn about the organization from the inside should submit a letter of nomination indicating the position for which he or she wishes to run. All OLAC personal members are eligible to serve, and self-nominations are highly encouraged.

The letter of nomination should include a brief description of pertinent qualifications and professional activities. It may also include a statement of the why the nominee wants to serve, and what he or she would like to accomplish, if elected. For those who wish to nominate an OLAC colleague, please be sure that person is willing to serve.



*Photo courtesy: Heidi Frank*

### OVERVIEW OF DUTIES

#### Vice President/President Elect

This office is elected annually, with a term beginning in the summer, and serves four years: a one-year term as Vice President, followed by one year as President, one year as Immediate Past President, and one year as Past-Past President. The VP/President Elect performs all duties delegated by the President and presides at meetings when the President cannot attend. The Vice President/President Elect is expected to attend OLAC Membership and Executive Board meetings (held during ALA conferences) while in office. The Vice President is also responsible for the OLAC Program at the ALA Annual Conference, should OLAC decide to sponsor a program. The VP/President Elect chairs the OLAC Research Grant Committee.

The OLAC President presides at all OLAC Membership and Executive Board meetings, is or appoints OLAC's Observer to the OCLC Members Council, submits quarterly reports for the OLAC Newsletter, and works closely with other members of the OLAC Executive Board in guiding the operations of the organization.

The Immediate Past President serves as Chair of the OLAC Awards Committee, Chair of the Website Steering Committee, and as a member of the OLAC Executive Board. The Past-Past President serves as Chair of the Elections Committee.

## Secretary

The OLAC Secretary serves a two-year term. The next Secretary's term will run from summer 2016 to summer 2018, with the term beginning and ending at the close of the ALA Annual Conference for those years. The Secretary is expected to attend OLAC Board, CAPC and Membership meetings at both ALA Annual and Midwinter conferences, and record the minutes of those meetings. The Secretary also maintains and disseminates the roster of the Executive Board, past OLAC Presidents, and OLAC appointees. In addition, he or she maintains the OLAC Handbook, and prepares any corporate reports required by the State of Minnesota.

Members of the Executive Board receive a \$100 stipend for attending OLAC Membership meetings during ALA conferences. Anyone who wishes to run for either of these positions should submit a brief description of their qualifications and professional activities in time for them to be printed with the ballot. The deadline for this information is December 31, 2015.

Please submit all requested nomination materials in electronic form to:

[Liz Miller](#)

Chair, OLAC Elections Committee

## News and Announcements

### T.J. Kao, Column Editor

#### OLAC Best Practices for Cataloging Video Games

OLAC CAPC announces the publication of “[Best Practices for Cataloging Video Games Using RDA and MARC21](#).” Including many in-line and full MARC record examples, it is accessible at the OLAC website. Feedback is welcome and may be directed to CAPC chair [Mary Huismann](#).

#### MLA RDA Best Practices—August Update

The August 11, 2015 Update of the RDA toolkit includes some revisions to MLA’s Best Practices to bring it in line with revisions made to the RDA instructions in the April update. This update includes improved guidance and examples for 2.4.1.1 (state of responsibility—scope), 2.11 (copyright date), and 7.13.3 (form of musical notation). The updated document is available via the RDA Toolkit.

#### Installation of OCLC-MARC Bib, Authority, and Holdings Format Update 2015

OCLC plans to install the OCLC-MARC 2015 Update in August 2015. All details are available in the [OCLC Technical Bulletin 265](#). This update includes changes announced by the Library of Congress in MARC 21 Update [No. 19](#) and [No. 20](#).

#### MLA/ALA’s “Cataloging Music AV Materials Using RDA” Webinar – Save the Dates!

The MLA Educational Outreach Subcommittee and the MLA Cataloging and Metadata Committee are pleased to announce a series of cataloging webinars that takes place between August and October 2015. For webinar description and registration, check out the [ALA store page](#). Any questions should be directed to [Mac Nelson](#).

#### AMIA Online Webinar Series – Save the Dates!

Beginning in September, AMIA is offering three webinar series, including an introduction to digital formats and storage, and best practices for personal audiovisual collections and small audiovisual archives. For webinar description and registration, check out the [AMIA Online page](#).

## **Members on the Move**

### **Jeremy Myntti, Column Editor**



### **Annie Glerum and Autumn Faulkner, OLAC Board Members**

The OLAC Executive Board would like to welcome Annie Glerum, Head of Complex Cataloging at Florida State University, as the new OLAC Vice President/President Elect and Autumn Faulkner, Assistant Head of Cataloging and Metadata Services at Michigan State University, as the OLAC Treasurer/Membership Coordinator.

### **Mary Huismann, recipient of the 2015 Nancy B. Olson Award**

Mary Huismann, Technical Services and Specialized Cataloging Librarian at the University of Minnesota, was awarded the 2015 Nancy B. Olson Award for the great work that she accomplishes related to audiovisual cataloging, especially related to her work as CAPC Chair. This award was presented to Mary at the CAPC Meeting during the ALA Annual Conference on June 26, 2015 in San Francisco, CA.

### **New CAPC Members**

Welcome to all of the new CAPC Members whose service began right after the ALA Annual Conference in June. This includes Rosemary Groenwald (Mount Prospect Public Library), Julie Renee Moore (California State University, Fresno), Thomas Whittaker (Indiana University), Jessica Hayden (University of Northern Colorado), Jessica Schomberg (Minnesota State University, Mankato), and Trina Soderquist (Boston College) as full CAPC members as well as Lisa Romano (University of Massachusetts Boston) and Amanda Scott (Auburn University) as CAPC interns.

### **Liz Miller published book titled “Fundamentals of Technical Services”**

Congratulations to Liz Miller, Cataloging Librarian at New Mexico State University and a Past President of OLAC, who has recently published a book titled “Fundamentals of Technical Services,” co-authored with John Sandstrom (Acquisitions Librarian at New Mexico State University).

## Carolyn Walden retires

Carolyn Walden, Associate Librarian, Mervyn H. Sterne Library, University of Alabama at Birmingham retired in June after 37 years of service. She joined the library in September 1978 as a music and audiovisual materials cataloger after receiving an M.A. in library science from the University of Iowa earlier that year. She also earned a master's degree in piano performance from the University of Cincinnati. Carolyn served as Head of the Department of Cataloging and Collection Management from 2008-2015, which by this time had expanded to encompass electronic resource management and digital collections.



Photo courtesy: Carolyn Walden

Carolyn attended the first joint OLAC/MOUG meeting in 1984 in Dublin, Ohio. She served as an intern on the Cataloging Policy Committee, 2006-2007 and as a member from 2007-2009. She was chair of the DVD Guide Update Task Force from 2007-2008 and a member of the Planning Committee for the 2009 ALA pre-conference *Cataloging Digital Media Back to the Future* co-sponsored by OLAC. She worked with OLAC members Marcia Barrett, Julie Moore, and Anchalee Roberts. Carolyn is also a member of the AV Glossary Task Force. Presently, she plans to remain a reviewer for *Educational Media Reviews Online*, to continue volunteer work with UAB Medicine Music and Wellness, and to begin volunteer work with adult literacy.

## Bobby Bothmann and Vicki Sipe, ALCTS leadership positions

Bobby Bothmann, Metadata and Emerging Technologies Librarian at Minnesota State University, Mankato, is now the chair of the ALCTS Cataloging and Metadata Management Section (CaMMS) Executive Committee. Vicki Sipe, Catalog Librarian at the University of Maryland, Baltimore County, was recently elected as President-Elect for ALCTS. She will assume her presidential responsibilities on July 1, 2016. Thank you to the two of them on their willingness to accept these leadership responsibilities.

## ***In the Spotlight with... Sandy Roe***

### **Lisa Romano, Column Editor**

OLAC members may know our September Spotlight profile Sandy Roe as the editor of *Cataloging & Classification Quarterly (CCQ)*. Sandy is currently the head of the Cataloging & Metadata Services Unit in Milner Library at Illinois State University (ISU), which is a former teacher's college (Normal school). The nine-person unit handles the cataloging for the school libraries of the Thomas Metcalf School (Pre-K-8) and University High School laboratory schools, plus the Teaching Materials Center (a collection of pre-K through Grade 12 materials supporting ISU's teacher education programs).



*Photo courtesy: Sandy Roe*

When asked, *What is one of the things that you most enjoy about your job?* Sandy responded: "Without a doubt the thing I most enjoy is seeing new ideas result in improvements that benefit my library's users – whether by providing more access, devising workflows that bring new efficiencies, making enhancements that better support our new discovery systems, and so forth. Save the time of the user!"

Sandy's unit just reached an important milestone after participating in the OLAC funnel for several years. They completed NACO training this past January and were declared "independent" in the spring. The unit is currently focusing on establishing personal and corporate body names related to ISU and its faculty.

At ISU, the Teaching Materials Center, in particular, has a large variety of special formats to be cataloged. Thus, the cataloging unit is aware and appreciative of the guidelines and training provided by OLAC and its members. Sandy first became aware of OLAC at her first professional position in 1999, which required cataloging special formats. She was honored to be trained and mentored by Nancy Olson at Minnesota State University, Mankato. "During those sessions, Nancy exhorted me to attend my first OLAC meeting and to become involved with this organization that she had helped to found."

The first OLAC/MOUG meeting Sandy attended was in Seattle in 2000. Since then, she has made many contributions to OLAC. Sandy was involved with the local arrangements committee responsible for registration for the OLAC 2002 conference (held in St. Paul, Minnesota), been on CAPC, served twice on the Nancy B. Olson Award Committee, and attended many OLAC conferences, and membership and CAPC meetings held during ALA.

It might surprise OLAC members to know that Sandy did not work in a library until she was 39 years old! However, she has been an “ardent” library user her whole life and actually lived just behind the local public branch library during her grade school and high school years. Sandy reflects, “I found myself contemplating going back to school for an MLS. Consequently, I took a shelving job at Champaign Public Library, and never looked back.”

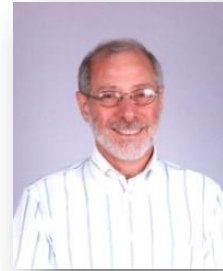
Not long after graduating from the library school at the University of Illinois at Urbana-Champaign. Sandy first began her career at *Cataloging & Classification Quarterly*. One of her professors recommended her to the editor, Ruth Carter, who was looking for a news column editor. Sandy served in this role from 2000-2005, where she learned about soliciting and planning content for future journal issues from the journal’s editorial board. While in this role, Ruth Carter suggested to her, “CCQ has never had a theme issue on audiovisual cataloging. Why don’t you do one?” As a result, *The Audiovisual Cataloging Current* was published in 2001. A few years later, Sandy had the opportunity to partner with another editorial board member on another theme issue on thesauri, which happened to be an interest of hers. That special issue *The Thesaurus: Review, Renaissance and Revision* was published in 2004. When Ruth Carter was ready to retire, she encouraged Sandy to apply as the editor. And Sandy has been the editor since 2005.

When queried about OLAC members publishing in CCQ, Sandy responded: “Always keep in mind that all journals are looking for the highest quality and the most timely content that they can acquire. If you see a hole in our professional literature that you could fill with a paper, or perhaps by guest editing a collection of papers for a thematic issue, please do so! CCQ, like other journals that publish special issues, are always looking for authors and for guest editors to bring good ideas to publication.”

And what if you are new librarian? Sandy offered the following advice: “*Stay curious; ask questions; read; seek out and learn from those more knowledgeable than yourself; share what you know.*”

## OLAC Cataloger's Judgment: Questions and Answers

**Jay Weitz, Column Editor**



### Uniform Title Pastabilities

Question: I have several spaghetti westerns “For a few dollars more” and “The good the bad and the ugly.” The primary sound track is in English with optional French or Spanish sound tracks. I have added the following fields:

730 02‡i Container of (work): ‡a For a few dollars more (Motion picture).

730 02‡i Container of (expression): ‡a For a few dollars more (Motion picture). ‡l French.

730 02‡i Container of (expression): ‡a For a few dollars more (Motion picture). ‡l Spanish.

If I control the fields they are changed to the Italian title:

730 02‡i Container of (work): ‡a Buono, il brutto, il cattivo (Motion picture).

730 02‡i Container of (expression): ‡a Good, the bad and the ugly (Motion picture). ‡l French.

730 02‡i Container of (expression): ‡a Good, the bad and the ugly (Motion picture). ‡l Spanish.

I realize that the movies were filmed/produced in Italy but weren't the soundtracks dubbed into Italian for release there? Should I use the Italian titles for the 730 fields?

Answer: If we can believe the Wikipedia article on the “Spaghetti Western,” which corresponds to what I remember about how these films were created, both casts and crews tended to be multinational and multilingual. The three big Sergio Leone films -- *A Fistful of Dollars* (oca07509779); *For a Few Dollars More* (oca07178740); and *The Good the Bad, and the Ugly* (oca08068003) -- were each originally released in Italian, hence the Italian preferred title (née, “uniform title”) in each case. So, not only should the French and Spanish dubbed expressions be identified with the respective Italian-language preferred title, but so should the English-language expression, with the subfield \$l added (in field 130). At least that's what I think would be correct.



## What's the Point of Power, Anyway?

Question: We have a book with an accompanying DVD-ROM which contains PowerPoint files, no moving video (in the usual sense) or sound. The master record in OCLC has "two dimensional moving image" as the content type for the 336 field. RDA toolkit defines two dimensional moving image as "content expressed through images intended to be perceived as moving, in two dimensions." Does that definition really apply to this situation? If not, what content type would best suit a DVD-ROM containing only PowerPoint files?

Answer: With each new version of PowerPoint there are increasingly sophisticated options for animation effects for entrance, exit, and emphasis, as well as for transitional effects from slide to slide. Not to mention the abilities to embed audio and video into a slideshow. But setting those aside, the sort of basic PowerPoint file that you briefly describe is a presentation of text and/or still image. Your RDA Content Type fields 336 should reflect those:

336 text \$b txt \$2 rdacontent

336 still image \$b sti \$2 rdacontent

That assumes the presence of both significant textual and significant image content. If one or the other isn't present, use only the appropriate 336.

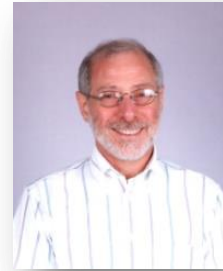
## Subfield and Stream

Question: I am currently working my way through some streaming videos that we have access to and trying to fix some of the problems with these records. I have come to dislike the Provider-Neutral record practice for online videos and wanted to ask your opinion on one particular record that I came across. The only streaming record for the video "Fishing in the sea of greed" is # 809029574, which looks like a locally-reproduced video record. The commercial streaming version is essentially the same as this and the public performance rights note at least has subfield \$5, but I wonder about the "converted from DVD with permission" note. Should I just ignore that and use this record?

Answer: The Streaming Media Best Practices document and OCLC recommend Provider-Neutral practices for streaming media, but we all recognize some of the problems that arise. You are certainly free to follow or not follow PN locally; the document's Sections IV.B and VII.C in particular have details on both practices. In either case, I'd be inclined to use the record you've found.

# News from OCLC

Compiled by Jay Weitz



## General

### **Lynn Silipigni Connaway Elected President-Elect of ASIS&T:**

Lynn Silipigni Connaway, OCLC Senior Research Scientist, has been elected President-elect of the Association for Information Science and Technology (ASIS&T) for the 2016 administrative year, and President for 2017. Connaway has been a member of ASIS&T for 25 years. She has served in a variety of leadership positions within the organization, including co-chair of the ASIS&T 2011 annual meeting and a Director on the Board from 2012-2015. Becoming President-elect at the conclusion of the 2015 Annual Meeting in St. Louis, Missouri, Connaway will support 2016 President Nadia Caidi, University of Toronto, with planning and developing programs and structure. Connaway will have completed a three year term on the Board as Director at Large in November before becoming President-elect.

## Cataloging and Metadata

### **OCLC-MARC Update 2015:**

The 2015 OCLC-MARC Update will implement MARC 21 Bibliographic, Authority, and Holdings format changes announced in MARC 21 Updates [No. 19 \(October 2014\)](#) and [No. 20 \(April 2015\)](#), including:

- Defining code “q” (Lease) in the Holdings 008/07 (Method of Acquisition).
- Removing “university presses” as part of the definition of Government Publication in the Books, Computer Files, Continuing Resources, Maps, and Visual Materials Bibliographic 008/28 and 006/11 (GPub) elements.
- Implementing the First Indicator (Source of Acquisition Sequence), subfield \$3 (Materials Specified), and subfield \$5 (Institution to which Field Applies) in Bibliographic 037 (Source of Acquisition).
- Implementing subfields \$q (Establishment Date) and \$r (Termination Date), and redefining subfields \$s (Start Period) and \$t (End Period), in Authority 046 (Special Coded Dates).
- Broadening the scope of Bibliographic 088 (Report Number) to include series report numbers.
- Implementing Bibliographic 370 (Associated Place).

- Implementing subfield \$e (Number of Ensembles) and making subfield \$s (Total Number of Performers) Non-repeatable in both the Bibliographic and Authority 382 (Medium of Performance) fields.
- Implementing Bibliographic and Authority 388 (Time Period of Creation).
- Invalidating the First Indicator in Bibliographic field 648 (Subject Added Entry: Chronological Term).
- Implementing field 884 (Description Conversion Information) in the Bibliographic, Authority, and Holdings formats.
- Implementing the repeatable subfield \$g (Miscellaneous Information) or making it repeatable in some 22 Bibliographic fields and 24 Authority fields.
- Implementing subfield \$i (Relationship Information) in thirteen 7XX Authority fields.
- Implementing subfield \$4 (Relationship Code) in fourteen 7XX Authority fields.

We will also make additions to WorldCat indexing, validate all MARC Codes defined by LC since July 2014, and implement subfields \$8 (Field Link and Sequence Number) in some 46 Bibliographic fields. In conjunction with our ongoing work to update *Bibliographic Formats and Standards* (BFAS) to incorporate RDA, we are harmonizing BFAS, WorldCat validation, and MARC 21 as to subfield validity and repeatability in both the MARC-defined and the OCLC-defined 1XX, 6XX, 7XX, and 8XX fields. All details will be available in an upcoming OCLC Technical Bulletin. We plan to install the OCLC-MARC 2015 Update during the third quarter of calendar year 2015 and will make announcements widely through the usual discussion lists and Connexion logon greetings.

**New Addition to the Dewey Decimal Classification (DDC) Editorial Team:**

OCLC is delighted to announce the appointment of Dr. Carol A. Bean as associate editor of the Dewey Decimal Classification (DDC). Carol comes to us from her position as Senior Research Scientist at the Center for Biomedical Informatics Research at Stanford University, the culmination of an illustrious career combining medical informatics and knowledge organization. The medical informatics perspective is evident in positions Carol has held as research information scientist, biomedical informatics program officer, and chief enterprise terminology officer within the (U.S.) National Institutes of Health (NIH) and as director of the Office for Certification in the Office of the National Coordinator for Health IT (ONC). The knowledge organization perspective is visible through a faculty appointment in the School of Information Sciences of the University of Tennessee, where Dr. Bean taught courses in cataloging and classification, abstracting and indexing, and health care informatics. Carol’s research and publications have focused on, inter alia, relationships in knowledge organization systems (KOS), creating mappings between KOS, semantic interoperability, information extraction from medical texts, and topical relevance relationships. She holds graduate degrees in biopsychology (University of Georgia),

information science (University of Maryland), epidemiology/biostatistics (University of California), and medical informatics (Columbia University). Carol is based in the Dewey Editorial Office at the Library of Congress. Please join us in welcoming Carol to the Dewey editorial team.

## Discovery and Reference

### **A New Interface for QuestionPoint:**

QuestionPoint's more contemporary interface design features easier-to-read screen displays, menus, and action buttons for librarians. It also delivers an improved user experience across devices, with screens that display as well on smartphones and tablets as they do on desktop or laptop computers. The new look is also present in patron chat and email forms, and on patron account screens. Details are available in [June 2015 QuestionPoint Release Notes](#). The Cooperative Resources page accessible only to 24/7 Cooperative members has also been redesigned, to give you an easier-to-use interface that mirrors changes throughout the service. We encourage you to review the Cooperative-specific features on this page. No changes are required for your staff to use the new QuestionPoint interface. You will automatically begin to use the new QuestionPoint interface when you login to the service. You may wish to review the way your library's logo displays in the redesigned page banner, to determine whether changes are needed for it to display appropriately in the updated banner design and colors.

### **OCLC Signs Agreements with Leading Publishers Worldwide:**

OCLC has signed agreements with leading publishers in Science, Technology, Engineering, Medicine, and other subject areas to add metadata for books, e-books, journals, databases, and other materials that will make their content discoverable through WorldCat Discovery Services. OCLC has agreements in place with more than 180 publishers and information providers to supply metadata to facilitate discovery and access to key resources. OCLC recently signed agreements with the following providers:

Science, Technology, Engineering and Medicine:

- American Society of Civil Engineers, based in Reston, Virginia, USA, is America's oldest national engineering society and publishes journals, books, proceedings, and standards.
- BMJ Publishing Group, based in London, UK, publishes more than 50 of the world's leading medical and allied science journals.
- EAGE (European Association of Geophysicists and Engineers), based in Houten, the Netherlands, is a global professional, non-profit association for geoscientists and engineers and publisher of EarthDoc.
- Informa Healthcare, based in London, UK, connects librarians, scientists, professionals, clinicians, and medical practitioners with books, journals, and reliable resources.

- SAE International, based in Warrendale, Pennsylvania, USA, is a global association of more than 138,000 engineers and related technical experts in the aerospace, automotive, and commercial-vehicle industries. SAE International offers SAE journals and technical papers.
- SPIE, the international society for optics and photonics based in Bellingham, Washington, USA offers books, journals, and a digital library in support of interdisciplinary information exchange, professional networking, and patent precedent.

#### Open Access and Multi-Discipline Content Providers:

- Canadiana.org, based in Ottawa, Ontario, Canada, provides broad access to Canada's documentary heritage via books, newspapers, periodicals, images, and nationally-significant archival materials.
- Directory of Open Access Books (DOAB), based in The Hague, the Netherlands, aims to increase the discoverability of peer-reviewed, academic Open Access books.
- Directory of Open Access Journals, based in Kastrup, Denmark, is an online directory that indexes and provides access to quality open access, peer-reviewed journals.
- Érudit, based in Montréal, Québec, Canada, is the largest disseminator of French-language resources in North America. Through its research platform, Érudit offers centralized access to francophone publications in the social sciences and humanities from North America.
- Korean Studies Information (KSI), based in Paju, South Korea, created the scholarly database of Korean Studies Information System (KISS) offering 3,200 scholarly journals and over 120 million scholarly papers.
- OpenEditions, based in Paris, France, serves the humanities and social sciences research communities through OpenEdition Books (books series), Revues.org (scientific journals), Calenda, (academic announcements), and Hypotheses (research blogs).
- Project Euclid, based in Durham, North Carolina, USA, and jointly managed by Cornell University Library and Duke University Press, is a not-for-profit online publishing initiative that provides access to journals, monographs, and conference proceedings in theoretical and applied mathematics and statistics.
- Publishing Technology PLC, based in Oxford, UK, is a content solution partner for publishers and provides content to OCLC from over 250 trade and scholarly publishers from around the world.

- Rittenhouse Book Distributors, based in King of Prussia, Pennsylvania, USA, provides libraries, retailers, and other businesses with print and electronic books in medicine, nursing, and allied health.

Metadata from some of these publishers will also be made available to users through other OCLC services based on individual agreements. Details about how this metadata may be used in library management workflows will be communicated to OCLC users as the data is available. By providing metadata and other descriptive content for more than 1.8 billion resources, these partnerships help libraries represent their electronic and physical collections more completely and efficiently. More about WorldCat Discovery Services and OCLC partnerships is on the [website](#).

### **WorldCat Discovery Adds Citations, Improves Temporary Lists, and More:**

[WorldCat Discovery Services](#) now includes APA, MLA, and Chicago citations to help students and faculty cite their sources and format them automatically. Improvements to the temporary list feature supports information-gathering for larger research projects. Many libraries also now have more time to make the transition to WorldCat Discovery, with the extension of unlimited access to FirstSearch. New features added in July 2015:

- Automated citations for APA, MLA, and Chicago: Users can now cite their sources from WorldCat Discovery automatically, in addition to using EndNote or RefWorks. The service supports APA, MLA, and Chicago citation styles to help users quickly format their citations correctly.
- Improvements to temporary lists: Now users who make a session-based list can add up to 100 items to their temporary list, and email or print the list to include local call numbers and locations. These enhancements make it easier for researchers with larger projects to follow up on all their sources—or for reference staff or faculty members to print lists for use by others.
- More time to make the transition to WorldCat Discovery: Based on member feedback, OCLC will extend unlimited access to FirstSearch beyond the previously announced date of 2015 December 31 to a to-be-determined date in late 2016. Access to per-search searching on FirstSearch will end on 2015 December 31.

## **Management Services and Systems**

### **VU University in Amsterdam Selects OCLC WorldShare Management Services:**

Vrije Universiteit (VU University) in Amsterdam, the Netherlands, has selected WorldShare Management Services to manage its library resources. VU University is part of the UKB consortium of Dutch university libraries that is moving its library services to WorldShare, the technology platform that makes it possible to integrate their metadata management and resource sharing into a global network to gain efficiencies

in workflow and IT infrastructure. Today, more than 330 libraries worldwide are using WorldShare Management Services to share bibliographic records, publisher and knowledge base data, vendor records, serials patterns and more. WMS also provides libraries with the unique opportunity to share innovation, applications, infrastructure, vision, and success in serving their users.

**Canadian Academic Institutions Select OCLC WorldShare Management Services:**

Carey Theological College, Portage College, Regent College, St. Mark's College, and Vancouver School of Theology, have selected OCLC WorldShare Management Services as their library management system. [WorldShare Management Services](#) (WMS) provide cloud-based library management and discovery applications in an integrated suite. WMS offers librarians a cost-effective way to manage workflows efficiently, and improve access to library collections and services for their students, faculty, and staff. Portage College is a public, board-governed college with eight campuses throughout Alberta. Portage provides continuing education, ad-hoc training, certificate, diploma and degree opportunities to more than 4,000 students, nearly one-third of whom are Aboriginal. The four theological institutions—Carey Theological College, Regent College, St. Mark's College, and Vancouver School of Theology—represent a broad range of Protestant and Catholic traditions and will share a single license. The libraries are all located in Vancouver, British Columbia. These five institutions will join Medicine Hat College, Lethbridge College, Redeemer University College, Tyndale University College & Seminary, and University of New Brunswick, bringing the total to 10 institutions in Canada to select WMS. All will use the OCLC data center in Canada. The five latest institutions to join the WMS community are scheduled to go live with the service later this year.

**American University of Sharjah Selects OCLC WorldShare Management Services:**

The American University of Sharjah, based in the United Arab Emirates, has selected OCLC's WorldShare Management Services as its new library management solution. The American University of Sharjah (AUS) noted several features of WMS that made it most appealing to library staff, including its ability to increase effectiveness of e-resource management workflows. Staff also noted that the integration of applications within the WMS suite, combined with the benefits derived from network effects as OCLC member libraries share data, work, and resources in the cloud-based environment, were instrumental in its selection of WMS. AUS is a member of the American International Consortium of Academic Libraries (AMICAL), which brings together 26 institutions of higher education located in 21 countries across Europe, West and North Africa, the Middle East, and Central and South Asia. AUS is the second member of the AMICAL group to select WMS. John Cabot University in Rome announced in April 2015 that it was moving to WMS.

## Resource Sharing

**WorldShare Interlibrary Loan Release, June 2015:**

A new release of WorldShare Interlibrary Loan took place on 2015 June 7. This release contains many requested enhancements and new features including:

- Book-club features that let you request and track multiple copies.

- Validations that help ensure only desired charges are triggered: WorldShare Interlibrary Loan now lets you know if your ILL or IFM charge exceeds the borrower’s maximum cost, as well as if you have specified IFM payment, but the borrower has not.
- Patron ID no longer passed to lender: For patron privacy, borrower data is no longer passed to the lenders who are not using WorldShare Interlibrary Loan (e.g., Clio).
- Clarified “Can you supply?” message: When saving a “Can you supply?” request, the message is now more specific.
- IFM pilot of charges triggered on Shipped: In the coming weeks, several libraries will help OCLC pilot test a new workflow in which IFM payments will be triggered when the lender marks the request as Shipped. Release of this feature to all libraries is planned for August 2015, and the ability to grant IFM refunds is targeted for the following release.

The [release notes for this install](#) are available on the OCLC website.

### **ILLiad Software Version 8.6 Now Available:**

ILLiad software version 8.6 is now available to ILLiad subscribers. Upgrade to ILLiad version 8.6 for these new features:

- Ability to send text message notifications (requires a Twilio account).
- Email templates all moved to database.
  - Note: It is suggested to move all .txt email templates to the ILLiad Customization Manager prior to your upgrade.
  - See the [following resource](#) for more details about the email template change.
- Odyssey Helper renamed to Electronic Delivery Utility and includes sending via Article Exchange.
- Transaction statuses can have aliases on the web.
- Users blocked for overdues can be automatically unblocked once they return the items.
- Shipping addresses pull from the OCLC request and not from the address book record, to ensure proper shipping.
- [Redesigned documentation](#).

ILLiad version 8.4 will not work with OCLC as of 2015 July 1. You must discontinue use of version 8.4 by 2015 June 30 so you do not lose access to OCLC interlibrary loan. You can update directly to version 8.6 from 8.4 without having to install 8.5 on client workstations. Users of ILLiad hosted should contact their hosted service provider to schedule an update. Self-hosted ILLiad users can run the server updater and then update client workstations. Additional details about ILLiad version 8.6 are provided [in ILLiad 8.6 Release Notes](#) and in [Implementing the New Features in ILLiad 8.6](#).



## Member Relations, Advocacy, and Training

### **New Community Center Offers a Place Online for Library Staff to Share:**

The new [OCLC Community Center](#) offers a place for library staff to connect online, share best practices, stay up to date on new product releases, and contribute ideas to improve OCLC services. Introduced to user groups at the 2015 ALA Annual Conference in June, the Community Center is now available to users of WorldCat Discovery Services, WorldShare Management Services (WMS), WorldShare Interlibrary Loan, WorldShare Collection Manager, WorldShare Record Manager, and WorldShare License Manager. More OCLC services will be added to the Community Center in the future. The Community Center enables library staff who use WorldShare and WorldCat Discovery services to find information they need in one place, including product updates, news, upcoming events, and discussion boards. Users can provide feedback and suggestions to peers and to the OCLC product teams to help improve and enhance products and services. The Community Center was inspired by the success of the OCLC Developer Network, where developers share ideas about a variety of OCLC services, and the WMS User Support Center, where libraries access news and information about WorldShare Management Services and share best practices. Library staff can sign in with the same credentials used to access WMS, WorldShare services, or the staff view for WorldCat Discovery to participate in the Community Center. Staff can create a profile and join the community related to specific services of interest. The new Community Center makes it easy for users to contribute to discussions using listserv-like email functionality, offer feedback, and make connections with peers who use the same OCLC services.

### **Seventeen New Webinars Added to the WebJunction Catalog:**

We'd like to thank the Nebraska Library Commission and the Washington State Library for collaborating with WebJunction to bring you even more archives to access via the WebJunction Course Catalog. The Nebraska Library Commission hosts the weekly series, [NCompass Live](#), with fantastic production by Christa Burns and wonderful presenters from around the country. The Commission also hosts the annual [Big Talk from Small Libraries online conference](#), and one of the archives added is from this year's conference. And from the Washington State Library, we've added the archives from a 4-part Tech Training Webinar Series they hosted in 2013 with Stephanie Gerding, covering practical tips and best practices for planning and promoting computer classes at the library, engaging students and evaluating success. The Washington State Library also hosts the [First Tuesdays webinar series](#). Certificates of completion are made available to all learners after completing any course or webinar enrolled in from the catalog. With more archive additions from TechSoup, Infopeople, OCLC, and ALCTS, you'll now find 143 webinar archives produced by WebJunction or by one of our content collaborators. Visit [WebJunction](#) to browse all the courses and webinar archives.

### **Now Available: ABLE Courses in the WebJunction Catalog:**

Some people mention them simply as ABLE. Others know them by their full collection title: Alternative

Basic Library Education (ABLE) Program. Those familiar with these courses know the amazing job the staff of the Idaho Commission for Libraries has done developing this content for newer members of the library community. And now, WebJunction is excited to include each course in this program in our free course catalog. Developed by staff of the Idaho Commission for Libraries, the collection of 13 online, self-paced courses offers a wide-range of introductory courses for individuals new to the library field. We are pleased to expand our self-paced offerings to support your continuing education efforts. The ABLE courses are organized around three key topical areas: Collection Development, Technical Services, and Public Services. With titles including *Collection Development Basics*, *Introduction to Technical Services and Catalog Records*, and *The Reference Interview*, you, or your staff, will find great introductory or refresher topics, good for the whole library. Through the support of OCLC, the Bill & Melinda Gates Foundation, and many state library agencies, WebJunction provides free, open, and easy access to library-specific courses for anyone in the library field. Today, the WebJunction Course Catalog hosts 143 webinar archives and 38 self-paced courses, including this strong collection of core library topics. A special thank you to the Idaho Commission for Libraries, for partnering with us, providing this content, and making it accessible within the WebJunction Course Catalog. Create your [free account today](#) and explore this great content.

## OCLC Research

### **The Archival Advantage:**

*The Archival Advantage: Integrating Archival Expertise into Management of Born-Digital Library Materials*, by Jackie Dooley argues for involving archivists in the management of born-digital library materials (i.e., created and managed in digital form). Key highlights include:

- The full array of traditional archival skills is equally relevant in the born-digital context.
- Research data sets, email, websites, blogs, and many other born-digital library materials have characteristics similar to analog archival materials.
- It is beneficial for digital librarians, IT experts, curators, library administrators, and other research library colleagues who manage digital materials to be aware of archivists' skills and expertise and their relevance to the digital context.
- Areas of archival expertise that other experts may lack include donor relations, appraisal, context of creation and use, authenticity, transfer of ownership, and permanence.

This essay also focuses on ten areas of archival expertise and their relevance to the digital context. These include confirming ownership, appraising the significance of content, documenting the context of creation, negotiating with collection donors and nurturing these relationships over time, recognizing and navigating legal issues, ensuring authenticity of files, and using practical approaches to creating metadata for large collections. Each of these is equally relevant for digital and analog (physical) materials. Archivists' in-depth knowledge of each area helps to ensure that the right questions are

addressed. The intended audiences for this publication include library directors and other managers who set the vision and direction for digital initiatives; technology specialists who manage systems and services in areas such as repository design, hardware and software, digitization, and website development; research data curation experts; digital preservationists; liaison librarians who have close relationships with users, including knowledge of their research methods; and metadata specialists. Archivists may find value in both the explication of the ten areas of archival expertise and the arguments for including them in a wide range of digital initiatives. This work is part of our Research Collections and Support efforts to inform libraries' current thinking about research collections and the emerging services that they are offering to support contemporary modes of scholarship.

### **Stewardship of the Evolving Scholarly Record:**

*Stewardship of the Evolving Scholarly Record: From the Invisible Hand to Conscious Coordination*, by Brian Lavoie and Constance Malpas, presents a view of future stewardship models of the evolving scholarly record and their practical implications. The scholarly record is increasingly digital and networked, while at the same time expanding in both the volume and diversity of the material it contains. The long-term future of the scholarly record cannot be effectively secured with traditional stewardship models developed for print materials. This report describes the key features of future stewardship models adapted to the characteristics of a digital, networked scholarly record, and discusses some practical implications of implementing these models. Key highlights include:

- As the scholarly record continues to evolve, conscious coordination will become an important organizing principle for stewardship models.
- Past stewardship models were built on an "invisible hand" approach that relied on the uncoordinated, institution-scale efforts of individual academic libraries acting autonomously to maintain local collections.
- Future stewardship of the evolving scholarly record requires conscious coordination of context, commitments, specialization, and reciprocity.
- With conscious coordination, local stewardship efforts leverage scale by collecting more of less.
- Keys to conscious coordination include right-scaling consolidation, cooperation, and community mix.
- Reducing transaction costs and building trust facilitate conscious coordination.
- Incentives to participate in cooperative stewardship activities should be linked to broader institutional priorities.

### **OCLC's Work with Library Linked Data Detailed in New Book:**

OCLC's work to help increase the visibility of library collections on the Web through the creation of library linked data—moving from a web of documents to a web of data—is described in a new book, *Library Linked Data in the Cloud: OCLC's Experiments with New Models of Resource Description*. Written by OCLC Research staff members Carol Jean Godby, Shenghui Wang, and Jeffrey K. Mixter, the book focuses on the conceptual and technical challenges involved in publishing linked data derived from traditional library metadata. This transformation is urgent, the book maintains, because it is common knowledge that most searches for information start not in a library, or even in a Web-accessible library catalog, but elsewhere on the Internet. Modeling data in a form that the broader Web understands may help keep libraries relevant in the network environment. In the book, the authors explain how the new Web is a growing "cloud" of interconnected resources that identify the people, places, things, and concepts that people want to know about when they approach the Internet with an information need. They also explain why linked data is an appropriate architecture for the description of library resources. The publication aims to achieve a balanced treatment of theory, technical detail, and practical application for librarians, archivists, computer scientists, and other professionals interested in modeling bibliographic descriptions as linked data. It is available in libraries, in print from Amazon and a variety of other retailers, and also as an e-book from Morgan and Claypool Publishers.

### **Factors in Archaeologists' and Zoologists' Skepticism About Data Preservation:**

Written by Rebecca D. Frank, Elizabeth Yakel and Ixchel M. Faniel, [\*Destruction/Reconstruction: Preservation of Archaeological & Zoological Research\*](#) is available in a special digital curation issue of *Archival Science*, Volume 15, Issue 2. A [preprint is also available online](#). Archaeology and zoology are fields in which data collection and analysis involve destruction. In this study, we examine the results of 49 interviews with archaeologists and zoologists, focusing on researchers' discussions of internal or disciplinary norms and external factors affecting their attitudes and actions concerning preservation. We identified two categories of disciplinary practices: data collection and data management/recordkeeping as key to shaping attitudes and activities about preservation. Likewise, we found three external factors: funding, legal requirements, and the status of museums and repositories, influencing attitudes toward preservation. We found that while archaeologists and zoologists are uniquely positioned to appreciate the value of data preservation, because data collection in both disciplines involves destruction, they are skeptical about whether preservation is possible and that these attitudes are influenced by both internal and external factors.

### **Making Archival and Special Collections More Accessible:**

[\*Making Archival and Special Collections More Accessible\*](#) represents the efforts of OCLC Research over the last seven years to support change in the end-to-end process that results in archival and special collections materials being delivered to interested users. Revealing hidden assets stewarded by research institutions so they can be made available for research and learning locally and globally is a prime opportunity for libraries to create and deliver new value. *Making Archival and Special Collections More Accessible* collects important work OCLC Research has done to help achieve the economies and efficiencies that permit these materials to be effectively described, properly disclosed, successfully discovered, and appropriately delivered. Achieving control over these collections in an economic

fashion will mean that current resources can have a broader impact or be invested elsewhere in other activities. Much of the work represented in this compilation was done with the specific advice, guidance, or participation of the staff at OCLC Research Library Partnership institutions. OCLC is grateful for this relationship, privileged to provide this venue, and committed to listening and leading in this Partnership. This publication will be beneficial to anyone interested in enhancing the library's value proposition by mobilizing unique materials in the networked environment. For more information about our work in this area, see our [Research Collections and Support theme page](#).

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