

2010

OLAC NEWSLETTER



Macon, Georgia

OLAC Biennial Conference

October 14-17, 2010



Volume 30
Number 3

September
2010

"Photos courtesy of the Macon-Bibb County CVB."

THE OLAC NEWSLETTER

The OLAC Newsletter (ISSN: 0739-1153) is a quarterly publication of the Online Audiovisual Catalogers, Inc. appearing in March, June, September and December. Permission is granted to copy and disseminate information contained herein, provided the source is acknowledged.

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FROM THE PRESIDENT

Sevim McCutcheon



Dear OLAC Members,

It is a pleasure to write this first column as the incoming President of OLAC. I would like to thank the outgoing members of the OLAC Executive Board, especially Pat Loghry, last year's President, for her steadfast leadership and consistently solid advice; and Paige Andrew, who served diligently as secretary for a number of years. They were much appreciated by all of us who had the chance to work with them. We welcome Amy Weiss as the incoming Vice President/President Elect, and Marcia Barrett, the incoming secretary.

The 2010 OLAC Conference is right around the corner! It takes place Friday, October 15th through Sunday, October 17th in Macon, Georgia, with a preconference on NACO funnel training on Thursday, October 14th. I look forward to meeting a number of you there. The conference website is: <http://olacinc.org/drupal/conference/2010/index.html>

Congratulations are in order to the winners of scholarships to attend the 2010 OLAC Conference. These are Christina L. Hennessey, Loyola Marymount University, Los Angeles, California; and Nerissa Lindsey, 2010 graduate of the University of Washington Information School, Seattle, Washington.

Among the fine presentations at the conference, expect to hear from Kevin Furniss and Morag Boyd, who received the 2009 OLAC Research Grant. They will present their findings on "Describing Reproductions: A Series of Decisions"

Congratulations also to Peter Lisius, who received the 2010 OLAC Research Grant, to facilitate his work on "PCC Practice for Assigning Uniform Titles to Motion Pictures, Television Programs and Radio Programs"

Finally, feel free to contact me at Lmccutch@kent.edu with any questions, concerns or suggestions you may have about OLAC.

FROM THE EDITOR

Kate James



I love summer and am always sad to see it go but the fall is an exciting time as well. This fall will be even more exciting than usual, as it features the 2010 OLAC Biennial Conference. The average high temperature of host city, Macon, Georgia, in October is a pleasant 77 degrees, perfect for traveling and sight-seeing. For more information, please see Julie Huskey's 2010 OLAC Biennial Conference Preview on page 32.

This issue of the Newsletter has the standard features you love, and also a few twists. OCLC's Tip of the Month appears for the second time. Its last installment was well received, so we've decided to make it a permanent feature. Additionally, the Book Reviews section will be transitioning to a Reviews section, where different types of cataloging resources will be reviewed. Starting this off is Phillip Suda of the Saint Louis County Library, who wrote reviews of three cataloging blogs: Cataloging Futures, Catalogablog, and The Cataloguing Librarian. Hopefully these reviews will help you discover additional resources to assist in your cataloging.

On a personal note, I would like to encourage everyone to read the text found on the Nancy B. Olson Award Plaque that was given to Julie Moore on June 27, 2010. Its inscription can be found on page 26, in the OLAC Membership Meeting minutes taken at ALA Annual 2010. Julie has made significant contributions to the audiovisual cataloging community, and it gave me great pleasure to see her receive this well deserved award. Congratulations, Julie!

Enjoy the fall, everyone.

TREASURER'S REPORT
3rd Quarter FY10
January 1 - March 31, 2010



Nathan Putnam

Treasurer's Report 4th Quarter FY10, Apr. 1-June 30, 2010 Nathan Putnam, Treasurer		
	4th Quarter	FY-to-Date
Opening Balance	\$ 22,498.51	\$ 20,281.92
Income		
Memberships	\$ 779.00	\$ 9,219.00
Other Inc	\$ -	\$ 27.41
Total	<u>\$ 779.00</u>	<u>\$ 9,246.41</u>
Expenses		
ALA	\$ -	\$ 240.00
Bank Charges	\$ 6.00	\$ 83.10
Board Dinner*	\$ -	\$ 565.39
Newsletter Production	\$ 50.00	\$ 3,277.09
PayPal Fees	\$ 8.26	\$ 18.30
Postage	\$ -	\$ 336.56
Stipends*	\$ 100.00	\$ 1,800.00
Supplies	\$ 200.00	\$ 294.64
Total Expenses	<u>\$ 364.26</u>	<u>\$ 6,615.08</u>
Closing Balance		\$ 22,913.25
Personal Membership	348	-8 for the FY
Institutional Membership	<u>128</u>	-37 for the FY
Total	<u>476</u>	

Joining OLAC through the mail or online. See <http://www.olacinc.org/drupal/?q=node/420> for more information

*Expenses for ALA Annual in June will be recorded in July

OLAC MINUTES JUNE 2010

Paige Andrew



OLAC Executive Board Meeting Minutes

June 4, 2010, 1:00 p.m.

Conference Call Hosted by OCLC

Present: Paige Andrew (Secretary), Marcia Barrett (incoming Secretary and guest), Debbie Benrubi (Outreach/Advocacy Coordinator), Bobby Bothmann (Immediate Past President), Robert Freeborn (Chair of CAPC), Julia Huskey (Chair, Program Planning Committee for 2010 Biennial Conference and guest), Kate James (Newsletter Editor), Patricia Loghry (President), Sevim McCutcheon (Vice President/President-Elect), Nathan Putnam (Treasurer), Jay Weitz (OCLC Liaison and guest).

Absent: Amy K. Weiss (incoming Vice President/President-Elect)

The meeting opened at 1 p.m. with President Pat Loghry leading.

1. Welcome and Introductions

Everyone introduced themselves so that we knew who was present online.

2. Announcements

Pat announced that she will work with Paige Andrew to determine a restaurant for the Executive Board Member dinner in Washington, D.C. that is scheduled for 6 p.m., Saturday, June 26th. Once a restaurant is chosen and reservations made she will communicate that information to everyone.

3. Amend and adopt the Agenda

No amendments to the agenda were heard. The agenda was adopted as stands.

Officers Reports:

1. Secretary's Report (Paige Andrew)

Paige reported that the minutes to all three OLAC meetings for the 2010 ALA Midwinter Meeting were published in the March issue of the OLAC *Newsletter*. He asked for any needed changes to the any of the sets of minutes, none were heard. A motion to accept the 2010 Midwinter Meeting minutes as published was made by Pat Loghry and seconded by Sevim McCutcheon. **Motion approved unanimously.**

2. Treasurer's Report (Nathan Putnam)

Nathan reported that at the end of May we are down 21 personal memberships and 35 Institutional memberships since the end of December 2009. However, he also noted that he is receiving about 10 new personal memberships per month, so it appears that membership remains stable overall.

In addition, nearly everyone renewing or joining OLAC is successfully using the online registration form and PayPal, so both of these implementations in recent months are working well for the organization. Also, the online registration form and paying via PayPal is working for the 2010 Biennial Conference.

3. CAPC Report (Robert Freeborn)

Rob recently sent out a draft Agenda for the upcoming CAPC meeting at ALA Annual to CAPC members and is waiting for any proposed changes and additions. Basically, an agenda is in place for the meeting as he does not expect any notable changes, with the following areas to be covered: Task Force updates, reports from various liaisons to CAPC, and updates to ongoing activities. He also reported that almost all of the group efforts at creating or updating documents have been completed or will be by the time the conference hits. RDA testing will be discussed at this meeting since OLAC is a partner in the testing process. Also, the outcome of the new Bibliographic Standard Record for BIBCO (BSR) for Visual Resources and Electronic Materials will be shared. Paige noted that he has worked in recent months as a member of the BSR for Cartographic Materials and all of the new BSR's will likely be completed and adopted by the PCC at Annual Conference.

Rob asked for Board input on the following two items:

a. CAPC's Subcommittee for Maintenance of CAPC Resources (SMCR)

David Procházka, long-time Chair of this Subcommittee, announced in recent months that he is stepping down from his position. He recommended another long-time Subcommittee member, Richard Leigh, as a replacement/new Chair. Rob contacted Richard awhile ago and asked if he would be interested in being the new Chair of SMCR and he is interested. Rob also asked for volunteers from CAPC but has not received any. Would it be okay to re-contact Richard and appoint him as the new Chair?

Action Item: The Board unanimously agreed this was acceptable and asked Rob to contact Richard Leigh for follow-up.

b. Possible new Best Practices group

Rob announced that CAPC may establish a new group called the Flash Memory Device Best Practices Task Force to create a set of guidelines.

4. Newsletter Editor's Report (Kate James)

Kate reported that the March issue of the Newsletter, first one in electronic form only, was successfully published. The June issue will go out the week of June 7-11 so be on the lookout for that. Specific business for the Board includes:

a. Book Review Editor position

Kate has received five worthy applications for this position, members of the Board will discuss in the Closed Session.

b. Newsletter Content

Kate is always looking for content for each issue, and suggested one thing we might want to pursue is to do “member interviews” as a means to get to know individual OLAC members on a more personal basis. Kate would create a set of standard interview questions, input on these from the Board are welcomed, and then serve as a liaison between matching up interviewees and an interviewer (perhaps an “interviewer” position could be appointed for the newsletter?) and then collect the outcome and get it published in the next issue. Board members received this idea with enthusiasm. Bobby also suggested that Kate use Survey Monkey as an easy way to contact OLAC members to find out what kind of content they would like to see in future issues.

Action Item: Kate was tasked by the Board to pursue this idea of publishing one interview in each issue of the Newsletter.

5. Outreach/Advocacy Report (Debbie Benrubi)

Debbie reported that she continues to send out copies of the membership brochure and other promotional materials to folks who will be doing such things as teaching cataloging workshops and this seems to be getting positive results. Debbie has also noticed that, and asked other Board members if they have also noticed, various published OLAC Guidelines and similar materials are being referenced regularly on various lists such as AUTOCAT. This is also a great way to make catalogers everywhere aware of what CAPC is doing for the profession and hopefully will also serve to generate new members.

Debbie has recently been receiving a few queries about membership in OLAC from Teresa via the OLAC website and interacting with these potential new members.

Debbie asked Pat if there has been a recent update to the schedule for the Affiliates Booth at ALA Annual Conference in D.C. Pat noted she had not seen anything recently but would follow up on this [note: Debbie received this information and posted the most-current schedule to the Board as well as placing an open invitation to OLAC members to sit at the Booth through OLAC-L.] Pat asked if an OLAC sign for use in the Affiliates Booth was completed, Debbie reported that it was.

Debbie’s next goal is to work with the Board on making changes to the Membership Brochure in the coming weeks.

Old Business:

1. OLAC Elections Committee (Pat for Vicki)

Pat read a report sent to her by Vicki Toy-Smith, which included:

- a. 2010 Election Results

Amy Weiss was elected the incoming Vice-President/President-Elect for two years (2010-2012)

Marcia Barrett was elected the incoming Secretary for two years (2010-2012)

Vicki thanked all OLAC members who ran for election and wished all well into the future.

2. 2010 ALCTS Preconference Program sponsorship, do we need to help with anything?

Paige reported that he would be co-teaching an ALCTS Preconference workshop, along with OLAC members Susan Moore and Mary Lynette Larsgaard, at the upcoming ALA Annual Conference. The Preconference is sponsored by ALCTS and co-sponsors are the Map and Geography Round Table (MAGERT) and OLAC. Everything is set in the way of co-sponsorship, nothing more needs to be done.

3. Discussion of time for ALA Annual, if we hold an open executive meeting, what do we want to do at that time? Do we want to set an amount of time/adjourn if no one else comes to the meeting but the board. Also, we are scheduled for a Membership meeting at 3:00 p.m. Sunday after-noon. Agenda updates?

Those present discussed the need for continuing to request of ALA, and pay for, a physical meeting space for a face-to-face Executive Board meeting given that using telephone conference calls to conduct our business seems to be working well. Pat asked the Board if we wished to continue the practice of conducting our meetings via telephone conference call, the consensus was that we wished to continue in this manner. Pat then asked if we could officially declare that there would not be a physical Executive Board Meeting held at the ALA conferences in the future. One point of concern raised was a scenario whereby an OLAC member wished to speak to the Board directly on a given issue or provide a presentation of some kind. While this certainly could happen, these instances of non-Board members attending a Board meeting in person have been rare and we could certainly conduct business through email and other means if this were to occur.

The Executive Board thereby agrees that from now on we will not request a room at ALA conferences in order to conduct our meetings.

Action Item: Pat will contact the membership via OLAC-L to let folks know that if they have any concerns or needs to discuss matters with the Executive Board it will be done through email or similar means in the future.

4. Nancy B. Olson Award Committee (Bobby Bothmann)

Bobby noted that this year's Nancy B. Olson Award Committee members are himself, Lori Kupsy of St. Louis University, and Paige. Julie Renee Moore is the 2010 Nancy B. Olson Award recipient and will be present to accept the award at the OLAC Membership Meeting, which will be held from 4-5:30 p.m. on Sunday, June 27th. Bobby also reported that the award plaque wording was completed by the Committee a few weeks ago and is on order, noting that the bill is expected to be sent to Treasurer Nathan Putnam directly but that if it ends up in his hands it will be forwarded to Nathan.

5. OLAC Conference Scholarship Committee (Bobby Bothmann)

Bobby noted that a recent email announcement was sent by him to OLAC-L and the committee has received some nominations so far but another announcement will go out soon. The closing date for nominations for the Scholarship is July 31st. Members of this year's committee include Bobby, Katie Eller of the St. Louis County Public Library, and Debbie Benrubi.

6. OLAC 2010 Conference (Julie Huskey)

Julie noted first that registration numbers so far are very disappointing, only 10 for the Conference, and 6 for the Preconference workshop, plus 5 individuals have applied to present Poster Sessions. More public relations efforts need to happen, and soon. Members of the Board agreed and asked to see regular announcements go out on OLAC-L plus suggested moving the link to the Conference website to the first page of the OLAC webpage to make it prominent.

Action Item: Julie will work with Teresa on the latter idea and follow through with email announcements.

Julie reported that a brochure was developed some time ago and sent by mail to all of the library schools in the southeastern region, she hopes to get some turnout of prospective new catalogers in the profession to the conference this way. Other items needing attention include:

a. Workshop Presenters

Some of the workshops are set in terms of presenters, but two that were identified by the OLAC membership as training needs are not; Cataloging in an Archives setting and one for Graphic Materials. Julie has been trying to find individuals to teach these two workshops without success. Marcia asked in relation to the Archives workshop if she really meant cataloging of materials in a Special Collections library setting versus teaching about doing true archival cataloging and suggested that a workshop on materials in special collections is probably what folks are after. Other Board members agreed, and after further discussion and suggestions Marcia volunteered to teach this workshop.

Action Item: Julie will contact the Board members after this meeting and ask for assistance in locating an instructor for teaching a Graphics Materials workshop upon the Board's suggestion that members of the Board have a broad and deep network of fellow catalogers that can be tapped into.

b. Julie brought a suggestion to the Board regarding a separately-held Sunday afternoon meeting to accommodate Georgia catalogers attending either the OLAC Biennial Conference or the Georgia Library Association Conference that starts on Monday. Julie's goal is to provide an opportunity for catalogers from around her state and nearby to be able to come together to discuss issues related to them since they have lost the support they used to have from SOLINET for such meetings (this happened when LYRASIS was formed) and folks cannot afford to attend two separate organization's conferences. She worries that it might be a conflict of interest to hold such a meeting, Bobby and others noted that if the meeting time is established for after the official closing of the Biennial meeting at Noon on Sunday and before any GLA meetings officially opened then such a proposed meeting cannot be considered a conflict of interest. Board members agreed that if Julie wished to pursue setting up such a meeting she should move forward with the idea.

Julie also reported that a site has been chosen by the Conference Committee for the Friday night banquet. It will be held at the Federated Garden Club of Macon, which owns an antebellum home in the city and rents it out for such events. Cost for rent is a very reasonable \$70/hour. Board members were pleased to hear this news and looked forward to the banquet.

New Business:

1. OLAC 2010 Conference – any new business

Julie asked whether there were any formal reimbursement procedures in place that she needs to know about after receiving a recent request for information. Bobby noted that there is not a formal procedure in place, this activity has been handled by past Conference chairs at their own discretion and asked Julie to work with her Committee to set up something that they are comfortable with using. Julie noted that speaker expenses naturally cannot be reimbursed without conference income, which is very small right now, so she will inform the speaker that they will be reimbursed at a later date.

Action Item: Julie will work with the Biennial Conference Committee members to establish a reimbursement procedure for speakers and others and communicate this to the Board, especially with Treasurer Nathan Putnam.

2. Small group to review and implement online and/or regional training. (Bobby)

Bobby shared ideas that the Board has brought up in the past about putting to use newly-found OLAC Income since the Newsletter is no longer being published in hardcopy. We have discussed in the past the need for such things as regional training initiatives and training opportunities using the online environment and he suggested that we move forward now on this idea.

Board members discussed the idea in general and several thoughts were brought out, including possibly co-sponsoring regional training initiatives with LYRASIS or similar, or even with individual state library associations since current library school students do attend those conferences. All agreed that whenever possible co-sponsorship with other organizations should be pursued to either share costs or take advantage of in-kind opportunities such as the free use of room/meeting/training space.

Possible training topics were also brainstormed and include delivering online training for specific cataloging topics, and doing a session on the NACO Funnel Project. Another suggestion was to start doing the Membership Meeting held at ALA Midwinter as an online meeting, keeping the face-to-face one intact at the Annual Conference.

Rob noted that MLA formed a committee to start up and run just such an effort a couple of years ago and it has been successful, perhaps we could partner with the MLA group?

Debbie also urged that we reach out for training initiatives to non-professional staff at our institutions by offering free or very low cost training to them. If this is successful it might get a few individuals to also join the organization.

Pat asked for volunteers to form an Online/Regional Training Committee, Bobby volunteered to chair the group. Marcia Barrett and Debbie Benrubi volunteered to serve as members.

Action Item: Bobby will get this group up and running immediately following the upcoming ALA Annual Conference.

3. Website rewrite – I'll be the board liaison for this, do we want to submit different pieces to different individuals or the whole board for comment. Do we have to submit to membership for approval (changes)? (Pat)

Pat and other volunteers have looked through the current website in recent weeks and would like guidance on how to pursue making changes. Bobby noted that it takes more time to farm out different pieces to individuals to review and make suggestions than for the Committee to do the work and then make sure to get approvals from the Board, the webmaster, and anyone else necessary. Paige concurred with the suggestion for the committee to do the work first and then seek out approvals when necessary. Board members agreed that Pat's group should take the lead and not work through other individuals. Changes do not have to be approved by the membership, but input can be received later and changes made based on that input.

Action Item: Pat will work with her committee to start making changes to the website, working with Teresa as needed to get the changes done technologically.

4. Other?

No other new business was raised.

Closed session:

Topics discussed at the closed session of the Executive Board included Conference Scholarship Committee needs, the Book Review Editor's position, and Biennial Conference issues.

Reported by Paige Andrew, Secretary of OLAC

OLAC Cataloging Policy Committee (CAPC) Meeting Minutes

Friday, June 25, 2010, 7:30-9:30 p.m.

Washington Convention Center 149 A/B

Chair Rob Freeborn called the CAPC Meeting to order at 7:30 p.m. There were approximately twenty-seven in attendance (listed on the sign-up sheet passed around).

Rob asked that we each introduce ourselves, and he started the process. CAPC Members and Interns, and OLAC Officers also indicated such.

1. Approval of Minutes (R. Freeborn)

Rob asked for any needed changes to the minutes of the CAPC Meeting held in Boston at the ALA Midwinter Meeting, as published in the March issue of the OLAC Newsletter. There were no changes heard. Paige Andrew moved to accept the minutes as published, Marcia Barrett seconded the motion, motion carried unanimously.

2. Announcements (R. Freeborn)

a. Rob announced that in September he will put out a call for new CAPC members and interns. If anyone present was interested in joining CAPC see Rob after the meeting or send him an email.

b. Rob reminded everyone that the 2010 OLAC Biennial Conference will be held in Macon, Georgia, October 14-17, and that the Conference website will allow you to register for the conference and for the conference hotel. See: <http://www.olacinc.org/drupal/conference/2010/index.html>

3. Reports & Discussions

- MARBI report (C. Gerhart)

See Cate's MARBI Report elsewhere in this newsletter.

- CC:DA report (K. McGrath)

See Kelley's CC:DA Report elsewhere in this newsletter.

- Subcommittee on CAPC Resources (SMCR) (R. Freeborn)

David Procházka, long-time Chair of this Subcommittee, alerted Rob in recent months that he is stepping down from his position. He recommended another long-time Subcommittee member, Richard Leigh, as a replacement/new Chair. The appointment of Richard Leigh as the new Chair of SMCR was approved by the Executive Board at its June 4th meeting. Rob will work with Richard to determine if more members

need to be added to this subcommittee. Rob thanked David for his many years of excellent service as chair of the subcommittee, and Richard for volunteering to take over.

- Video Language Coding Best Practices Task Force (K. McGrath)

The Video Language Coding Best Practices document has been a draft for a long time because the task force wanted to make some changes to the MARC format. We had to wait for the many RDA issues to be decided before MARBI had time to discuss our proposals. OLAC's suggestions have now been turned into a discussion paper for MARBI (<http://www.loc.gov/marc/marbi/2010/2010-dp05.html>). Our main recommendations are that (1) there be a clear distinction between oral languages (such as soundtracks) and written languages (such as subtitles, captions, and intertitles) when recording coded language information for moving images and (2) that there be a subfield where the original language of a work can be unambiguously coded.

- Moving Image Work-Level Records Task Force (K. McGrath)

This task force has fulfilled its charge. A summary of the task force's findings will be posted to the OLAC website to supplement the detailed reports.

- LC Genre/Form Headings for Moving Images Best Practices Task Force (Scott M. Dutkiewicz for B. Anderson)

A draft of these guidelines was placed on the OLAC website on June 22, 2010 and the Task Force is asking for comments and suggestions. The deadline for comments is July 23, 2010. The draft document is not related in any way to LC's recent decision regarding the creation of a separate thesaurus for genre/form headings.

- SlotMusic Best Practices Task Force (M. Barrett)

Marcia announced that this new set of guidelines is now published and available on the OLAC website for use, see http://www.olacinc.org/drupal/capc_files/SlotMusic.pdf. This was a joint effort from members of both OLAC and the Music Library Association (MLA). An email was sent out to OLAC members on OLAC-L a couple of weeks before this conference with the document attached, and a member noted an error in one of the subject heading examples due to a very recent change to the heading by LC. This error will be taken care of immediately following the conference.

Marcia identified and thanked the members of the TF: Marcia Barrett, chair (OLAC), Jim Alberts (MLA), Cyrus Ford (OLAC), Steve Henry (MLA), Michi Hoban (MLA), and Jay Weitz (OLAC & MLA).

- Audiovisual Materials Glossary Update Task Force (H. Frank)

Heidi announced that on the web "administrative" interface, the ability to assign source citations to terms has been added, and is being tested for bugs, etc. The next step is to contact the task group and get them started on evaluating existing terms and entering new terms. There currently are 4 people

from the original group who are able to work on this part: Andrea Reed, Karen Sigler, Katia Strieck, and Amy Pennington, plus there is Carolyn Walden, who will be working on drafting the introduction, and Heidi. She plans to be available for training and helping people to use the administrative interface (for adding, editing terms, etc.), and she needs to program a public interface – at least something that will make it accessible to start.

- RDA Testing (K. McGrath)

OLAC and MLA were selected as a partner in the U.S. national libraries' RDA testing project. We are currently waiting for the release of RDA, after which there will be a three-month training period and a three-month period during which we will create test records.

There will be a meeting for U.S. RDA Test participants on Sunday, June 27, 2010, 10:30 AM-12:00 PM, Washington Convention Center 202A. There will also be an in-depth orientation session on the logistics and procedures for the test at the Library of Congress on Monday, which Kelley will be attending.

- Library of Congress Genre/Form Update (J. Young)

See Janis' Genre/Form Update report elsewhere in this newsletter.

Janis announced that LC catalogers will implement cartographic genre/form headings in new cataloging on Sept. 1, 2010. She also talked about the changes to the MARC coding for genre/form headings and announced that the Policy and Standards Division of the Library of Congress will provide at least 90 days' notice before beginning to distribute authority and bibliographic records that reflect the change in coding.

Janis asked if controlling the new LCCN prefix of "gf" in the 010 field would cause problems to the best of anyone's knowledge. Meeting participants didn't think it would be a problem.

John Attig and others expressed strong concerns about the short timeline for implementation of coding and other changes to both bibliographic and authority records, in relation to local ILS structure adjustments, and asked if the PSD could provide additional time to work through details at the local level. Janis will take this suggestion back to the PSD and provide information when she has it available.

Janis was asked if the forthcoming new genre/form thesaurus would contain its own syndetic structure, and she replied that it would. Janis was asked where the decisions about creating a separate thesaurus came from and she replied from the PSD based on input from other units in LC.

Cate Gerhart asked Jay Weitz if OCLC has been able to successfully control the \$2 subfield in bibliographic records and also add updates to the thesauri lists. Jay responded that OCLC is able to do both but has not had to do so yet.

4. Old Business

- Bibliographic Standard Records (BSR) for Video Recordings, Graphic Materials & Electronic Resources (W. Walker)

Walter shared the process by which the committee created the BSR's. The draft BSR for video recordings is at: <http://www.loc.gov/catdir/pcc/bibco/BSRPVM-Final-Report.pdf>. The draft BSR for graphic materials is at: <http://www.loc.gov/catdir/pcc/bibco/BSRGM-Final-Report.pdf>.

And the draft BSR for electronic materials is at: <http://www.loc.gov/catdir/pcc/bibco/BSRER-Final-Report.pdf>. The task group is waiting for final approval (and possibly more recommended revisions) from the PCC Policy Committee.

Walter thanked the members of the committee for their work, they are:

Greta de Groat (Stanford University)

Teresa Keenan (University of Montana)

Julie Moore (California State University, Fresno)

Donna Viscuglia (Harvard University)

Iris Wolley (Columbia University)

Walter Walker (Loyola Marymount University), Chair and Coordinator

- Moving Image Work Grant (K. McGrath)

Kelley is working on finding viable grant opportunities to test the practicality of the Moving Image Work-Level Records Task Force's recommendations and the utility of a work-centric, faceted interface for moving images. Last fall, she formed a discussion group to help plan a grant project. She hopes to make available some of this group's work, such as its literature review, on the OLAC website in the near future.

This spring, Bill Kules, an LIS professor at Catholic University whose research interests include faceted navigation and exploratory search, assigned his UI design class to sketch out possible scenarios for a work-centric user interface for moving images. These sketches will help to more clearly articulate requirements for the user interface. OLAC has agreed to fund a small-scale demonstration interface using around 100 sample works and a programmer has started working on this.

5. New Business

- MARBI 007 & 046 DP Ideas (K. McGrath & C. Gerhart)

There had been some discussion on the OLAC list and elsewhere suggesting that OLAC members are interested in possible changes to the MARC 007 and 046 fields. Kelley and Cate led a discussion of the issues related to each of these fields.

It has been suggested that explicit coding for remote and direct access electronic resources be added to 007 fields for content such as moving images and sound. OLAC best practices have recommended adding an 007 both for the electronic resource aspect and the content aspect. Right now catalogers have to choose “other” for many options in the content 007. OLAC’s streaming media best practices document acknowledges this by stating that “available options for MARC 007 coding have not kept up with technological change, so current 007 standards do not provide a wealth of appropriate choices for streaming media.”

One of the primary problems right now is that there is no reliable way to identify online media content. However, it has been pointed out that with the new 008 form codes, online and direct access resources can now be distinguished without recourse to 007. These resources should also have an electronic resource 007 that distinguishes between remote and direct access. This, in combination with Leader/06 Type of Record is sufficient for identifying online versions of various kinds of content and, at least in most cases, direct access electronic versions.

There was some discussion of the option of adding new codes to video, sound, and possibly other 007 fields for electronic resources, primarily for the specific material designation, but also for the videorecording format, and possibly dimensions for videos.

Kelley posed the following questions: “Is it worthwhile to pursue specific code values rather than relying on ‘other’ as a category?” “Should we have a different 007 for streaming media versus downloadable?” and “Will the new Form codes for online versus direct access electronic resources be sufficient to bring out these aspects of online or electronic media?” There was no consensus on the issues and a suggestion was made to pose these questions to the membership at large on

OLAC-L for further input. Kelley and Cate will pursue this suggestion.

046\$*k* in the MARC bibliographic record is for recording the beginning or single date of creation of a resource. 046\$*k* had been suggested in a discussion on the OLAC list as a good place to consistently record the original date of moving images. LC has agreed to revise the instructions for 046\$*k* to remove the prohibition on repeating dates that are coded elsewhere in the bibliographic record. They do not need a proposal.

The remaining question is whether 046\$*k* is sufficiently specific or whether we need separate subfields for different types of work dates.

The Moving Image Work-Level Records Task Force identified the following types of dates that could be associated with a moving image work:

- Copyright: The year a moving image work is registered for copyright.
- Production: 1. The year or range of dates or specific date during which the material that forms the basis of a moving image work is created. 2. The year a moving image work is completed.
- Recording: The year or range of dates or specific date a performance is captured on a medium as a moving image work.

- Release / Distribution / Broadcast: The year or range of dates or specific date a moving image work is made available to the public through sale, lease, rental, and/or over telecommunications networks.
- Unknown

In the authority format, 046\$k is defined as the “earliest date (normally the year) associated with a work; that date may be the date the work was created or first published or released.”

It was decided that keeping all work dates in 046\$k without specifying the exact type of date is a workable solution at the present time. A task force will be created to develop a best practices document giving guidance and recommendations on which types of dates to prefer in this subfield. Rob will organize this new task force and ask for volunteers after the conference.

- Flash Memory Device Best Practices Task Force (R. Freeborn)

Rob lead a discussion on the desirability of creating a Task Force to create a format- and content-neutral document defining what these items actually are and how best to handle them. Committee members were asked if they had seen any bibliographic records for flash memory devices in OCLC, nobody has seen one yet, but some have been discussed on email lists.

This task force could possibly create a set of guidelines by distilling general principles from the current guidelines from the Playaway and SlotMusic Best Practices documents. It could be a joint task force with MLA, but would have to cover more than audio content.

Rob agreed to hold further discussions about forming a joint TF after the conference and lead the effort in pushing this forward.

6. Adjournment

Paige moved for adjournment, Marcia Barrett seconded the motion. The CAPC meeting was adjourned by Rob Freeborn at 9:33 p.m.

OLAC Membership Meeting Minutes

Sunday, June 27, 2010, 4:00-5:30 p.m.

Washington Convention Center 203AB

1. Welcome and Introductions (Pat Loghry)

We went around the room and introduced ourselves. There were twenty-four in attendance, twenty OLAC members and four guests.

2. Changes/Set Agenda

Pat asked for any changes or additions to the agenda. None were heard and the agenda was adopted as stated.

3. Announcements

From Pat Loghry:

When I was a kid, I used to watch Bob Hope sing his theme song "Thanks for the Memories." As I close out my year as President I do wish to say thank-you for the memories. It was a pleasure to serve the members, this organization and to help move forward some of the AV cataloging changes.

Over the past year OLAC has moved from a paper newsletter to an all electronic one. We have also added the option for electronic payment using PayPal for membership dues and registration fees for this year's upcoming conference in Macon, Georgia, October 14-17, 2010. Thanks to Nathan Putnam for moving the PayPal issue forward.

OLAC co-sponsored the ALCTS Preconference 2-part workshop, Cataloging & Description of Cartographic Resources: From Parchment to Pixels, Paper to Digital. Part 1, Basic Map Cataloging, is scheduled for Thursday, June 24, 8:30-5:00 p.m., and Part 2, Digital Cartographic Materials Cataloging, is scheduled for Friday, June 25, 8:30 a.m.-12:00 p.m. Both sessions will be held at the Washington Convention Center 146C. For more information go to:

<http://www.ala.org/ala/mgrps/divs/alcts/confevents/upcoming/ala/ac10/maps.cfm>

Look for the 2009 OLAC research award presentation at the Macon conference as Kevin Furniss and Morag Boyd will discuss "Describing Reproductions: A Series of Decisions" The research award winner has been picked for 2010, and we look forward to an announcement soon.

Finally, my thanks to the Executive Board: Sevim McCutcheon, Paige Andrew, Nathan Putnam, Kate James, Bobby Bothmann, Robert Freeborn and Deborah Benrubi. You are a great group to work with and I so appreciate your patience and your support. A word of thanks goes out to Jay Weitz for all your help with the conference calls. I look forward to seeing you all at the OLAC meetings in Washington, D.C and also at the OLAC conference.

Thanks for everything.

4. Officer's Reports

- Secretary's Report (Paige Andrew)

Minutes to all three OLAC meetings from ALA Midwinter were published in the March issue of the OLAC Newsletter. Minutes to all three meetings from this conference will be published in the September edition. The OLAC Executive Board Meeting was held via conference call on June 4, 2010.

Paige asked that anyone providing reports at this meeting to please send them to him in writing if at all possible.

This conference marks the end of two years for Paige as your Secretary. He noted that he believes he has provided the OLAC membership with a job done well, though in one area he did not do so well. That area was in reviewing and revising the OLAC Handbook. There was work put into this effort during the first year or so of Secretarial duties, but in the past six months circumstances prevented a continuation of this work, and thus it will now be up to the incoming Secretary, Marcia Barrett, to bring this important document up to speed. Paige noted that the Executive Board has made a number of important and positive decisions in the past two years to better the organization, but some of them have not been documented, or documented well, while others have.

Paige concluded with the following remarks "I hope that I have met your expectations both as your Secretary and as a contributing member of the Executive Board. It has been an honor and a privilege to serve the members of OLAC."

- Treasurer's Report (Nathan Putnam)

Nathan announced that overall OLAC is in fine financial shape. Currently membership stands at 345 personal members and 128 institutional members. The number of institutional members has fallen but overall membership remains about the same as last year. He also noted that as of this conference he has 84 expired memberships and Nathan asked if anyone present fell into this category to contact him after the meeting.

The treasury currently stands at just over \$20,000. For a complete Treasurer's Report see the June 2010 issue of the newsletter.

Under new business, Nathan noted that in the past few months we have implemented both an online registration form and a means for paying for both dues and conference registrations through PayPal. This has been a huge success; in recent weeks nearly everyone renewing their membership dues has done so online through this means.

- Newsletter Editor's Report (Kate James)

Kate noted that the first online-only OLAC newsletter was the March issue. The June issue is due out in very early July. She will also soon be sending out a survey to all OLAC members seeking information and input towards newsletter content. Finally, Kate announced that we have a new Book Review Editor, Katie Eller from the St. Louis County Public Library.

- Cataloging Policy Committee (CAPC) Report (Robert Freeborn)

Rob reported that CAPC met Friday night, June 24th with another excellent turnout. Nearly all of the Task Force's and committees formed in the past couple of years have completed their specific assignments, and new guidelines and other documents now reside on the OLAC website for everyone's use. The AV Glossary Task Force has a plan in place to complete its work by the time of the ALA Midwinter Meeting in January 2011.

Efforts to create new BIBCO Bibliographic Standard Record (BSR) cataloging standards, one for Graphic Materials, one for Electronic Resources, and one for Video Recordings, are nearly complete. Final drafts of these can be found on LC's BIBCO website at: <http://www.loc.gov/catdir/pcc/bibco/BSRPVM-Final-Report.pdf>, <http://www.loc.gov/catdir/pcc/bibco/BSRGM-Final-Report.pdf> and <http://www.loc.gov/catdir/pcc/bibco/BSRER-Final-Report.pdf> and it is anticipated that the PCC Steering Committee will officially adopt these sometime in July. OLAC members who worked diligently on the two BSR's include Greta de Groat (Stanford University), Teresa Keenan (University of Montana), Julie Moore (California State University, Fresno), Donna Viscuglia (Harvard University), Iris Wolley (Columbia University), and Walter Walker (Loyola Marymount University), coordinator and chair.

Rob also noted that CAPC is looking into the possibility of forming a joint Task Force with MLA to create a new set of general principles guidelines for flash memory devices in both AACR2R and RDA.

- Outreach/Advocacy Report (Nathan Putnam for Debbie Benrubi)

Nathan read Debbie's report in her absence:

Thanks go to the many OLAC members who have promoted OLAC when teaching workshops and attending regional conferences in recent months. These include Dana Tonkonow from Central Connecticut State University, who taught a workshop entitled "Video & Sound Recordings: Cataloging Basics" at the Middletown Library Service Center in Middletown, Connecticut; Rebecca Lubas from the University of New Mexico, who promoted OLAC at a meeting of the New Mexico Library Association Conference; Shelby Harken from the University of North Dakota who uses OLAC materials and promotes OLAC while mentoring cataloging interns; Amy Pennington from St. Louis University who promoted OLAC at workshops on cataloging audiovisual materials at the MOBIUS Annual Conference in Columbia, Missouri and the Missouri Library Association Annual Conference; and Paige Andrew from Pennsylvania State University who promotes OLAC at his map cataloging workshops. OLAC has been promoted at

several regional cataloging meetings in Northern California and OLAC and CAPC publications are referenced regularly on discussion lists such as AUTOCAT and on OCLC messages. I know there are many others who promote OLAC and I'm sorry if I left out your name here; please let me know anyone else who should be included and I'll make sure it gets into the newsletter. Your efforts to raise OLAC's profile are much appreciated. It really helps to let everyone know the great work CAPC is doing and I think it helps to generate new members, especially as the Biennial Conference draws near.

The OLAC website also helps generate interest. I occasionally receive inquiries on membership or the conference through the website.

Several members are representing OLAC at the ALA Affiliates Booth this week. Thanks to everyone who signed up including Heidi Frank, Annie Glerum, Sevim McCutcheon, Pat Loghry, Paige Andrew, and Rob Freeborn. There are still a couple of slots open tomorrow, at noon and 3 pm, so if you want to sit for an hour, do some people watching and talk up our organization to passers-by, you can do it at Booth 2533 on the Exhibits floor.

5. Liaison Reports

- MARBI Report (Cathy Gerhart)

No report given. See the MARBI Report elsewhere in this newsletter.

- CC:DA Report (Kelley McGrath)

No report given. See the CC:DA Report elsewhere in this newsletter.

- OCLC Report (Jay Weitz)

Jay provided another very informative report, details of which can be found in the "News from OCLC" report published in the June 2010 newsletter. The items that he highlighted and provided details at the meeting include:

1. An update of the activities of the Expert Cataloging Community
2. News about the next version of the Connexion Client, which will include a link to the RDA Toolkit and will be released in early 2011
3. Connexion Client 2.2 has been released and works with old 64-bit computers
4. An overview of the numbers of records scanned and merged under the new DDR software implementation in recent months, which is quite impressive. Jay also asked that if anyone notices incorrect merges occurring to please notify him or OCLC's Quality Control unit immediately.

- Library of Congress Report (Paige Andrew for Janis Young)

Paige noted that he failed to bring handouts to the meeting as he agreed to do in Janis' absence, but did indicate that two key items included information about genre/form headings updates and also the LC decision to pull genre/form headings from LCSH and create a new and separate g/f thesaurus. See the LC Report from Janis elsewhere in this newsletter for further details.

- Music OCLC Users Group Report (Pat Loghry for Mary Huismann)

Pat read the following report for Mary:

The Music OCLC Users Group will hold its annual conference in February 8-9, 2011 in Philadelphia, PA, immediately preceding the Music Library Association Conference. The Program Committee is in the process of developing the program and details should be available by early autumn. In the meantime, you may read more about the Music Library Association conference theme "Born Digital: A New Frontier for Music Libraries" at the conference website: <http://program.musiclibraryassoc.org/Theme>.

6. Activities Reports

- Nancy B. Olson Award (Pat Loghry)



Pat read the content of the NBO Award plaque to the group and then presented the award to Julie Moore. Julie then delivered a moving acceptance speech to those in attendance. Pat also noted that she will Chair next year's Nancy B. Olson Award Committee and that Julie is automatically a member of that committee. This year's NBO Award Committee members, Bobby Bothmann (Chair), Lori Kupski, and Paige Andrew were thanked. Wording from the plaque:

OLAC...

presents the 2010 Nancy B. Olson Award
to
Julie Renee Moore

for significant, varied, and diverse contributions to audiovisual cataloging and catalogers at the local, state, and national levels over more than twenty years. Most especially she is honored for:

teaching, working with, and guiding a group of six interns in Alaska who have become successful Librarians in their own careers

contributing her own records to the bibliographic universe for formats that include electronic resources, videorecordings, realia, maps, legal materials, serials and more

promoting through poster sessions, presentations, teaching and writing, the understanding of cataloging a variety of formats of materials

teaching and promoting the new international cataloging rules, *Resource Description and Access* (RDA)

service and leadership in a variety of ways to her profession and to other communities of peoples

In addition she is recognized for strong and ongoing contributions to the OnLine Audiovisual Catalogers, Inc. organization, notably as a member and editor of a task force to update a heavily used cataloging guideline, as a member of a task force to create a new national standard for electronic resources cataloging, and coordinating and leadership roles for a highly successful ALA Preconference workshop "Cataloging Digital Media: Back to the Future" in Chicago.

- Elections Committee (Pat for Vicki Toy Smith)

The results of the 2010 election for open Executive Board positions of President/President-Elect and Secretary are as follows:

Amy Weiss was elected the incoming Vice-President/President-Elect for two years (2010-2012)

Marcia Barrett was elected the incoming Secretary for two years (2010-2012)

These results, along with pictures of both candidates, were published in the June 2010 issue of the Newsletter.

- OLAC Research Grant Report (Kevin Furniss)

Kevin delivered an update of progress on behalf of himself and Morag Boyd regarding their research on the topic of “Describing Reproductions: A Series of Decisions.” Kevin’s portion of the presentation to be given at the upcoming 2010 OLAC Biennial Conference in Macon, Georgia will focus on serial-related reproductions while Morag will be speaking on non-serial reproductions.

7. Old Business

- Moving Image Work Grant (Amy Weiss)

No report.

- Web Steering Committee (Pat Loghry)

Pat announced that a Web Steering Committee has been formed and begun initial work on reviewing the content of the OLAC website. The position of Past President will be the chair of this group moving forward; therefore Pat will serve as chair of the Web Steering Committee for 2010-2011. Look for announcements via OLAC-L in the near future. Members of the committee include Lucas Wing Kau Mak and Heidi Frank.

8. New Business

- 2010 OLAC Biennial (Macon) Conference (Sevim McCutcheon for Julie Huskey)

Sevim covered several details relating to the upcoming Biennial Conference in October, most notably that the conference website is up and running and that members can now register for the conference and the hotel. Also, all but one program now has a presenter attached to it; Julie is still looking for someone to do a presentation on cataloging Graphic Materials. For details relating to the upcoming conference see the June 2010 issue of the OLAC Newsletter and/or go to the conference website at: <http://www.olacinc.org/drupal/conference/2010/index.html>

- Passing of the Gavel to New President (Pat Loghry)

Pat invited Sevim McCutcheon to the podium and formally introduced her as the new President of OLAC and gave her the President’s gavel.

9. Move to Adjourn

Sevim moved to adjourn the Membership Meeting, which closed at 5 p.m.

CONFERENCE REPORTS
Jan Mayo, Column Editor

**** REPORTS FROM THE ****
2010 ALA Annual Conference
Washington, D. C.

Machine-Readable Bibliographic Information Committee (MARBI)
Liaison Report

submitted by Cate Gerhart
University of Washington Libraries

This report includes updates on proposals and discussion papers of interest to the OLAC constituency from the recent ALA MARBI meetings in Washington DC. If you would like to see the complete list of topics discussed, you can find them at: <http://www.loc.gov/marc/marbi/>

Proposal No. 2010-06: Encoding the International Standard Name Identifier (ISNI) in the MARC 21 Bibliographic and Authority Formats

This proposal extends the use of the \$0 “Authority record control number” to be available for the new ISNI which is a unique identifier of public entities, enabling these entities to be disambiguated when necessary.

Proposal No. 2010-07: ISBD punctuation in the MARC 21 Bibliographic Format

This proposal looks at solutions to a problem submitted by the German National Library. They would like to be able to indicate in the bibliographic record when ISBD punctuation has been left out of the record and instead supplied by using the MARC coding. This proposal passed with a number of amendments. Check the format for exact wording, but the basic decision was to define a new code in Leader/18 (Descriptive Cataloging Form, “Desc” in OCLC). The new code will be “c” and will indicate that punctuation has been excluded when redundant. Also, code “i” was redefined to indicate that punctuation is included when coded “i”. Small wording changes were also needed in some of the other codes.

Proposal No. 2010-08: Encoding Scheme of Coordinate Data in Field 034 (Coded Cartographic Mathematical Data) of the MARC 21 Bibliographic and Authority Formats

This proposal was tabled because more information was needed before a decision could be made. The proposal seeks to find a way to indicate that a system other than the standard one was used to encode the coordinates of a map. Although the bibliographic community has traditionally used one system, there are a number of other systems that it would be nice to use in our records when needed.

Proposal No. 2010-09: Addition of Subfield \$u to Field 561 (Ownership and Custodial History) to the MARC 21 Bibliographic and Holding Formats.

This proposal passed with one amendment. It added the \$u to the 561 so that web links can be created to provide access to additional information about the ownership/custodial history of an item. The amendment made the \$u repeatable so that more than one link could be made if necessary.

Discussion Paper 2010-DP04: Encoding the ISTC in the MARC 21 Bibliographic and Authority Formats

This discussion paper presented four options for encoding the new International Standard Text Code (ISTC) which was formally published as a standard in March 2009. This standard defines an identification system for textual works intended for use by publishers, bibliographic services, retailers, libraries and rights management agencies. The option that was preferred by the group was Option 2, which would record this identifier in the 024. Because the 024 is already in the format no further work would be needed to implement this solution.

Discussion Paper 2010-DP05: Language Coding for Moving Images in Field 041 of the MARC 21 Bibliographic Format

This discussion paper looked at revising some definitions in the 008/35-37 and 041 \$a and \$j for moving images so that there was a distinction between spoken, sung and signed, and written language. More discussion of the wording will be done using the MARBI list, but in general there was agreement that for moving image materials “zxx” should be used when there is no spoken, sung or signed content. This would move all coding of subtitles, captions, intertitles, etc. to the 041.

The other topic discussed in this paper was how to predictably tell what the original language of a moving image is. Currently this information might be in the 008/35-37, but sometimes this is the dubbed language, or it might be in the 041 \$h, but there might be a number of \$h’s in the record for other textual accompanying materials. There was no clear consensus about how to proceed with this part of the paper and CAPC will be discussing this further to decide whether or not it thinks this is worth working on. It may be that in the future authority records or “work” level records could unambiguously indicate this information.

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

submitted by Kelley McGrath
Ball State University Libraries

CC:DA has reviewed the list of issues deferred until after the first release of RDA (<http://www.libraries.psu.edu/tas/jca/ccda/docs/jsc1004.pdf>). OLAC and MLA have agreed to look into the issue of preferred source of information as it relates to items where a collective title is only found on the container (RDA 2.2).

OLAC members created four examples of non-print RDA records that will be posted on the JSC website. These include examples of cataloging a textual digital reproduction, a feature film, a computer game, and a kit. I would like to thank Jeannette Ho, Joy Panigabutra-Roberts, and Susan Wynne for their contributions.

A number of sticky points were uncovered during the development of the examples and John Attig has communicated our core concerns to the JSC. Issues raised include the lack of useful options to describe the computer game in some controlled vocabularies, such as content type, and difficulties with describing accompanying material that does not have a title. In addition, RDA reached the odd conclusion that, in the *Titanic* example, James Cameron, is a “creator” in his role as screenwriter, is “other person, family, or corporate body associated with the work” in his role as producer and director, and is a “contributor” in his role as composer for the expression. There is also a significant problem with relating the content, carrier, and media terms when more than one set of terms is needed to describe the content of a record, such as with kits. It is not clear that a computer can reliably link the individual groups of terms in order to present them to users as icons or in other more user-friendly ways.

CC:DA has also been working on reviewing proposed updates to the Greek Romanization table, reviewing changes to the procedures for creating and updating ALA/LC Romanization Tables and reviewing the 2010 draft of the ISBD Consolidated Edition.

Association of Moving Image Archivists (AMIA)
Cataloging and Metadata Committee
Liaison Report

submitted by Thelma Ross
Academy Film Archive

The AMIA Cataloging and Metadata Committee elected a new Chair, Randal Luckow, Digital Archivist, and Turner Broadcasting System. The Committee will be hosting a pre-conference cataloging workshop on November 2-3, prior to the 2010 AMIA Conference, to be held in Philadelphia.

2010 OLAC BIENNIAL CONFERENCE PREVIEW

Julie Huskey

Official registration for OLAC 2010 in Macon, Georgia will close September 20; after that, registration will be handled on a space-available basis. We have established a [short] waiting list for the preconference.

There are a couple changes in the breakout session offerings. Susan Wynne, of the University of Wyoming, will lead a session on Oral histories. 2009 OLAC research award winners Kevin Furniss, of Tulane University, and Morag Boyd, of Ohio State, will present "Describing Reproductions: A Series of Decisions" as a breakout session.

POSTER SESSIONS

We're looking forward to a good mix of topics for our poster sessions on the morning of Saturday, October 16. The following people are scheduled to present:

Anna Fiolek, NOAA Central Library, "Mapping, Cross-walking, Converting and Exchanging Oceanographic Metadata Information in Video Data Management System"

Cyrus Ford, University of Nevada Las Vegas, "Introducing SlotMusic and Guide to cataloging SlotMusic Based on AACR2 Chapters 6 and 9"

Marielle Veve, University of Tennessee-Knoxville SLIS, "The Streaming Guide to Cataloging Remote Access Multimedia: A How-to Virtual Manual for Catalogers"

Shelley Smith, University of West Georgia, "Creating the New Provider-Neutral Records"

Miriam Hudgins and **Kristin Howard**, Mercer University School of Medicine Library, "Cataloging Learning Resource Center Collections at Mercer University School of Medicine"

Kelley McGrath, "FRBR, Facets, and Moving Images"

Susannah Benedetti and **Gary Moore**, UNC Wilmington, "Law & Order: Implementing a DVD Security System at UNC-Wilmington"

Linda West, Northeastern State University, "More is better: enhancing access to classical music on CDs"

Valarie Adams, University of Tennessee-Chattanooga, "M-M-M Good! Reclassifying a Music CD Collection into LC"

Please check out our conference blog, <http://macon2010.wordpress.com/>, and our conference website, <http://www.olacinc.org/drupal/conference/2010/index.html>, for the most up-to-date information.

As always, do not hesitate to contact Julie Huskey (huskey_je@mercer.edu) or Muriel Jackson (jacksonm@biblib.org) if you have questions about the conference or about Macon.

LIBRARY OF CONGRESS UPDATE

Janis L. Young

Policy and Standards Division, Library of Congress

LC Booth. The LC booth theater will again feature LC staff giving presentations on a variety of topics. Webcasts will also be screened. Of special note are two showings of the HISTORY *Modern Marvels* program featuring the Library of Congress that aired on June 10, 2010. In the hour-long episode, titled “The Real National Treasure,” more than 50 staff members of the Library and the Architect of the Capitol are interviewed about the Library’s vast array of activities. The program will be repeated in the booth on Monday, June 28, at 3:00 p.m.

ILS Upgrade. The Library is planning to upgrade the LC ILS to Voyager 7.2.0 in November 2010 and does not anticipate any significant disruption in service to users. The OPAC will also be updated to the Tomcat interface at that time. Any planned outages will be announced on the OPAC sites prior to the upgrade.

Prints and Photographs Online Catalog. LC launched a new Prints & Photographs Online Catalog (PPOC) on March 23, 2010. In addition to completely rebuilding the application with a new search engine and new application framework, an inviting new interface was also provided. The new URLs for individual items are now persistent and thus more easily crawlable by external search engines. The result is a beautiful, highly visual presentation of some of the Library of Congress’ amazing content.
<http://www.loc.gov/pictures/>.

RDA Test. Library Services is working with the National Library of Medicine and National Agricultural Library to test the proposed cataloging standard, *Resource Description and Access*, for feasibility, compatibility with existing metadata, cost-effectiveness, and user satisfaction before decisions are made regarding implementation of the new standard. With the co-publishers’ recent announcement that RDA Online will be released in June 2010, the testing is expected to begin with a 3-month learning period over the summer, with actual creation of records in the test to run from October through December. Information about the U.S. RDA Test itself is available at <http://www.loc.gov/bibliographic-future/rda/>. Questions about the RDA content can be sent to LChelp4rda@loc.gov.

LC Documentation and Training Materials for the RDA Test. Documentation, policy decisions, training materials, etc., developed by the Library of Congress for the U.S. RDA (Resource Description and Access) Test, has been posted to <http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html>. This includes documentation about the U.S. RDA National Test Plan, Reconsidering the Cataloging Treatment of Reproductions, etc. All interested parties, whether participating in the RDA Test or not, are welcome to use and modify these files for their local situations. Note that these files represent decisions just for the RDA Test; some of the decisions may be changed as a result of feedback from the Test or rescinded, should the decision be to not implement RDA. Many of the documents are working drafts. As some decisions are modified due to other decisions, updated versions will be posted.

Pre- vs. Post-Coordination in LCSH. PSD has completed a review of the status of the initiatives and projects outlined in the 2007 report on pre- versus post-coordination of *LCSH*. The status review, entitled “The Policy and Standards Division’s Progress on the Recommendations made in ‘Library of Congress Subject Headings: Pre- vs. Post-Coordination and Related Issues’” was approved by the Acquisitions and Bibliographic Access Directorate (ABA) managers in May and is available to the public through LC’s web site at http://www.loc.gov/catdir/cpsd/pre_vs_postupdate.pdf.

Subject Headings for Cooking and Cookbooks. On the June 2, 2010 Tentative Weekly List, PSD approved revisions to approximately 800 subject headings for cooking and cookbooks, to replace the word “Cookery” with “Cooking” (e.g. **Cooking, Cooking (Butter), Cooking for the sick, Aztec cooking, Cooking, American--Southwestern style**). In approximately 500 additional authority records, the reference structure for a heading was revised but not the heading itself (e.g., **Brunches, Comfort food, and Tortillas** had the broader term **Cookery**); in such cases the revisions were made off list.

A new topical subject heading **Cookbooks** and a genre/form heading **Cookbooks** have also been approved, and are available for use.

Most of the *Children’s Subject Headings* in the form **Cookery--[ingredient]** have been cancelled in favor of the adult heading **Cooking ([ingredient])**. However, three of those headings have been retained and revised: **Cooking (Buffets), Cooking (Garnishes), and Cooking (Natural foods)**.

Distribution of the revised authority records began on June 14th and will continue until completed. The revision of *Subject Headings Manual (SHM)* H 1475, “Cooking and Cookbooks,” is forthcoming and will be posted as a PDF file on the Cataloging and Acquisitions web site, <http://www.loc.gov/aba/>, and will also be included in *SHM* Update Number 2 of 2010, to be distributed in the fall.

Cataloger’s Desktop Demonstration. A free *Desktop* demonstration and training during ALA will be held at the Library of Congress on June 28 from 1:30PM– 2:45 PM in the Pickford Theater, Madison Building.

Classification Web Demonstration. A free *Class Web* demonstration/training during ALA will be held at the Library of Congress on June 28 from 1:30-2:45 p.m. in Dining Room A, Madison Building.

Subdivisions for Video Recordings. The subdivisions **–Video catalogs, --Video recordings for foreign speakers, –Video recordings for French, [Spanish, etc.] speakers, and –Film and video adaptations** were revised or cancelled on March 3, 2010. This marked the final phase in the cancellation of headings and subdivisions for video recording forms and genres in *LCSH* in accordance with the decision announced on November 6, 2009 in the paper entitled “Decision Regarding the Final Disposition of *LCSH* Headings for Video Recordings.”

Genre/Form Thesaurus to be Separated from LCSH. The genre/form thesaurus is now entitled, *Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT)*. This title will appear in print for the first time in the *Supplemental Vocabularies* volume of the 32nd edition of *LCSH*. A separate MARC source code “lcgft” has been assigned to distinguish headings in *LCGFT* from *LCSH* headings. The authority records will be revised as follows.

- Byte 11 of the fixed field (008/11) will be coded “z” (“other”)
- The 040\$f will be coded lcgft

In bibliographic records, terms from LCGFT will be coded: 655 -7 \$a [Term.] \$2 lcgft

Additionally, LCCNs with the distinctive prefix “gf” will be used as record control numbers. The authority records will be revised to reflect these changes within the next few months, and PSD will provide at least 90 days’ notice before making these changes.

PSD is also beginning work on a separate, self-contained, manual for genre/form terms and is investigating the possibility of extracting *LCGFT* from *Supplementary Vocabularies* and publishing it separately.

Moving Image and Sound Recordings Projects. The moving image and sound recording headings have moved out of the development stage and are now being maintained.

Cartography Project. Approximately 65 cartographic genre/form headings were approved in mid-May and the subdivisions used for maps will be revised in late summer, with LC implementation to occur soon thereafter, but no earlier than August 1, 2010. PSD will announce the firm implementation date as soon as it becomes available.

Music Project. PSD is collaborating closely with the Music Library Association to deconstruct existing topical headings into their constituent genres/forms, carriers, and mediums of performance, so that those elements can be separately coded and searched.

Further Information. For more information on the genre/form projects at the Library of Congress, contact Janis L. Young, LC’s genre/form coordinator, at jayo@loc.gov or refer to LC’s genre/form web page, <http://www.loc.gov/catdir/cpsoc/genreformgeneral.html>.

CALL FOR CANDIDATES-OLAC OFFICES

OLAC is seeking nominations for the offices of OLAC Vice President/President Elect and OLAC Treasurer/Membership Coordinator. 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. It should include a brief description of pertinent qualifications and professional activities.

All OLAC personal members are eligible to serve and self-nominations are highly encouraged. For those who wish to nominate an OLAC colleague, please be sure that person is willing to serve. Nominations will also be accepted from the floor during the OLAC Membership meeting held at the 2011 ALA Midwinter meeting.

OVERVIEW OF DUTIES

Vice President/President Elect

This office is elected annually 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. S/he 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 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 and as a member of the OLAC Executive Board. The Past Past President serves as Chair of the Elections Committee.

Treasurer/Membership Coordinator

The incumbent of this office serves a two-year term, with the election being held in years alternating with that of the office of Secretary. The next Treasurer's term will extend from summer 2009 to summer 2011. The Treasurer attends all Membership meetings and must meet the same attendance requirements as the Vice President/President Elect. The Treasurer is responsible for the overall financial concerns of OLAC. S/he reviews the OLAC budget, submits financial statements at the OLAC Executive Board meetings and for the OLAC Newsletter, handles OLAC funds, and maintains records of all sources of income and payments disbursed. The Treasurer is also the OLAC Membership Coordinator. As such the Treasurer is responsible for keeping an accurate, current list of OLAC members and maintaining the database of the OLAC membership directory.

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, 2010.

Please submit all requested nomination materials in electronic form to:

Bobby Bothmann

Chair, OLAC Elections Committee

robert.bothmann@mnsu.edu

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CALL FOR CAPC PARTICIPATION

OLAC's Cataloging Policy Committee (CAPC) is seeking applicants for full member and/or intern positions with terms beginning after the ALA Annual Conference in July 2009. Members serve a two-year term; interns serve a one-year term. Qualifications for each are as follows: 3 years of current audiovisual cataloging experience or the equivalent; evidence of regular interaction with online cataloging systems or demonstrable knowledge of such systems. Most CAPC business is conducted during the ALA Midwinter and ALA Annual conferences. Candidates for appointment to CAPC positions must be willing to commit time and funds as necessary to attend these meetings.

If you are interested in applying for a CAPC position, please send a letter detailing your qualifications and your resume to Robert Freeborn by January 3, 2010. You can also send your application materials electronically to me at [rbf6@psu.edu]. Feel free to contact me with any questions you may have. Appointments will be made by ALA Midwinter 2010.

Robert Freeborn

Music/AV Cataloging Librarian

Cataloging and Metadata Services Dept.

126 Paterno Library

Pennsylvania State University

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(814) 954-0059 (voice)

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NEWS AND ANNOUNCEMENTS

Barbara Vaughan, Column Editor

Special MOUG Newsletter issue (public and technical services)

As you know, MOUG provides advocacy and education for music-related issues in OCLC products, addressing both the public- and technical-services perspectives. MOUG's June 2010 newsletter has several items that are of special interest for all. See the newsletter at <http://www.musicoclcusers.org/Newsletter/104June2010.pdf>.

* This special issue includes several tributes to Ralph Papakhian, who was a founding member of MOUG and a recipient of MOUG's Distinguished Service Award.

* You may not have heard that OCLC plans to phase out the FirstSearch interface to WorldCat (not before the end of 2012 though). WorldCat Local will eventually be the interface for WorldCat. This issue will impact everyone, including public services. MOUG Chair Steve Luttmann (Music Librarian, University of Northern Colorado) says more about this and what MOUG is doing in his "From the Chair" column.

* The newsletter has summaries of MOUG's San Diego sessions, as well as updates from OCLC about changes and services that will be of interest to both public and technical services library staff.

The special issue will be available online for the coming weeks free of charge so you can read the tributes and check out the rest of the content. For more information about MOUG (and MOUG membership/subscriptions), please see <http://www.musicoclcusers.org/>.

Originally posted by Tracey Rudnick, MOUG Past Chair (2010-2011 term) and Mary Huisman, OLAC/MOUG Liaison

REVIEWS

Katie Eller, Column Editor

Blog Reviews: Cataloging Futures, Catalogablog, and Cataloguing Librarian

Cataloging Futures

Cataloging Futures, www.catalogingfutures.com, is the blog to go to for up-to-date resources and links on the latest in cataloging trends. It is maintained by Christine Schwartz, the Metadata Librarian at Princeton Theological Seminary, and considers the future of cataloging and metadata in libraries. To that end, RDA (Resource Description & Access) is given considerable attention. Helpful links to RDA classes, resources, and tools are posted on a regular basis. Metadata standards and their continued importance for catalogers are a recurrent theme in the posts as well. OLAC members should find these entries particularly useful, especially those related to linked data, the semantic web, Publishers' ONIX schema, and digital content.

Many of the posts are links to articles, webinars, and presentations. Opinions and professional insights into trends and developments are kept to a minimum. The underlying intent is to provide news and links pertaining to advances in cataloging, not to discuss successful implementation.

As with any blog, especially cataloging ones, organization of content should be considered. The “Categories” tag cloud at Cataloging Futures is very useful in finding topics, and they are a good indication of what topics are addressed most often. The ability to comment on posts is also available, but the participation of readers is minimal. Another useful feature at Cataloging Futures is the “Future of Cataloging: Key Resources” section. It is a collection of academic papers, articles, and presentations by leaders in the field of cataloging. Cataloging Futures

Catalogablog

Catalogablog, <http://catalogablog.blogspot.com/>, is a great resource for librarians that need to stay on top of trends in the library world, but who also need information regarding the everyday maintenance and upkeep of library catalogs. The blog is maintained by David Bigwood, librarian at the Lunar and Planetary Institute in Houston, TX.

Catalogablog covers much, including: library trends, e-book readers, Google news, cataloging cartographic resources, and changes to Library of Congress Subject Headings. OLAC members should find posts on electronic resources, metadata, and digital libraries of particular interest. Like Cataloging Futures, many posts are simply links to news articles or cataloging updates, but Catalogablog also offers some personal insight and guidance as well.

Catalogablog does have an archive but finding past topics by tag or category is not possible. Readers must search the archive by date to find previous topics and posts. Considering the importance of easy access and navigation of information, Catalogablog should have tags and assigned categories for posts, especially with such a broad focus. The ability to make comments on posts is also missing. For those

librarians wanting to make comments and participate in the blogging process, Catalogablog is not the place, but to get the big picture on cataloging, from trends to everyday cataloging topics, it is a great resource.

The Cataloguing Librarian

While the previous two blogs focus mainly on providing blog readers with news updates, resources, and links to relevant information for cataloging librarians, The Cataloguing Librarian, <http://laureltarulli.wordpress.com/>, addresses how changes in the library world are dealt with in a real world setting. It is maintained by Laurel Tarulli, Collections Access Librarian at Halifax Public Libraries. Many of her posts show how trends and developments in cataloging are actually being implemented in a library, including posts on next generation catalogs.

The Cataloguing Librarian shows readers how trends are impacting libraries and librarians in a very concrete way. In so doing, it is useful for those librarians needing updates on advances in cataloging but also needing guidance on how these new standards are put into practice. It also addresses topics relevant to the daily upkeep of catalogs, such as Library of Congress updates and discussions of DDC (Dewey Decimal Classification). The blog is well organized with a tag cloud, list of top posts, Laurel's twitter updates, and even the option to view posts by month. Comments by readers and the discussions that follow each post are almost as rich with information as the posts, the sign of a very good blog. For those librarians wanting to see how the trends and daily activities of the cataloging world are handled in a real world environment, the Cataloguing Librarian should not be ignored.

Reviewed by Phillip Suda
Cataloger/Librarian
Saint Louis County Library
Saint Louis, MO

**OLAC CATALOGER'S JUDGEMENT:
QUESTIONS AND ANSWERS**

Compiled by Jay Weitz



Logic in "Stereo."

Question: Often in the 538 or 300 tag I see the word "stereo" with a period (full stop) after it (e.g., "DVD, stereo., ..."). I also see it in an example in AACR2, 7.7B10. I guess it's an abbreviation for "stereophonic." Do you keep the period in, to distinguish it from the noun, or delete it?

Answer: As illogical as it may seem in the context of everyday usage, "mono.", "stereo.", and "quad." are all considered to be abbreviations (for "monophonic," "stereophonic," and "quadraphonic," respectively) by AACR2 Appendix B.9. So whenever and wherever they appear, they should always be followed by a period (unless, for instance, they're being transcribed in a title or a quoted note). AACR2 often works in mysterious ways.

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Attention to Detail

Question: I am working with a graduate student on a cataloging practicum. We were cataloging some government documents and he asked me why I was putting the extra publication information (January 1956 for example) in a note field rather than using a DtSt "e" and putting the year in the first date field and the month in the second date field. I just love it when new people ask those gotcha questions <grin>. I didn't have a good answer for him other than I had never seen it done that way before. And to be honest I hadn't really noticed the option before. I'd like to give him a better answer than "I've never done it that way before". So do people use that option and if so in what circumstances? Is there a benefit to using one method over the other? And can anyone show me an example of a record in OCLC that uses the DtSt "e"?

Answer: The use of the "Detailed Date" code "e" in DtSt (008/06) and the corresponding YYYY, MMDD in "Dates" (008/07-14) is not common. When it is used properly, it is usually for one of two circumstances: (1) technical reports that state such a specific date, which is generally included in a quoted 500 note or in the 260 subfield \$c; or (2) a date of original broadcast for television programs, which usually appears in a note or in 260 subfield \$c. One reason that the "Detailed Date" is mostly limited to these two circumstances is at least partly historical in MARC terms. Until Format Integration in the mid-1990s, the "Detailed Date" code was valid only in the Books and the Visual Materials formats (and was actually a different code, but that's a long story for some other time if anyone really cares at this point). I'm not aware of any reason why the current "Detailed Date" code of "e" couldn't be used in other circumstances now, although there's no obvious advantage to using it. (Of course, we obsessive catalogers sometimes get a special thrill from correctly using obscure MARC elements, don't we?) The

text that is currently in BFAS under DtSt Code "e" (<http://www.oclc.org/bibformats/en/fixedfield/dtst.shtm>) about technical reports and Visual Materials is based on what the pre-Format Integration MARC document said. Such cataloging rules as AMIM and DCRM (B) allow for the recording of specific dates in the Publication, Distribution, Etc. area and/or in notes, a practice that could naturally translate into using DtSt "e" and "Dates" YYYY, MMDD. OCLC has some brief optional guidelines on the cataloging of technical reports in BFAS 3.3 (<http://www.oclc.org/bibformats/en/specialcataloging/default.shtm#CHDJHJDI>). Here are a few records that use DtSt "e", although I can't vouch for the quality of the cataloging: #24423293, #31501670, #27418572, and #436878879.

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Mess Kit

Question: I am banging my head against the definition of a "kit" right now. I have these "kits" by Lakeshore "products designed with learning [not cataloging] in mind!" One example is: *Is Your Mama a Llama?* This "kit" contains a "big book" (48 cm., published by Scholastic), a teacher's guide, riddle cards, puzzles, and a bag of plastic and plush animals (including one llama, bat, swan, seal, cow, and kangaroo) -- everything else says it's published by Lakeshore. It is packaged in a big hanging bag. What I have "feels" like a kit (Visual Material, Type o), but before I go ahead and catalog it as a kit, I want to run this by you because it sort of fits the AACR2 Appendix D definition of "kit": "An item containing two or more categories of material, no one of which is identifiable as the predominant constituent of the item." (The thing is, I think the big book is probably considered the predominant piece of the kit. But then if you asked my son, he would definitely say that the bag of animals is the predominant material.) But, LCRI 1.10 says "For items that are made up of two or more components, treat one component as the predominant component; treat the other components as accompanying material." That sounds like I should catalog the big book and add the other parts as accompanying material (Books, Type a; 300 + \$e). What's your take on this?

Answer: Confusion about how to deal with kits is understandable because there have been historical contradictions between LC and OCLC practice in this area. AACR2 1.1C1 has two lists of General Material Designations (GMDs), the first for British use and the second for use in Australia, Canada, and the United States. (Yes, this is in regard to GMDs, not SMDs, but please bear with me.) The 1.1C1 list includes the GMD "[kit]". LCRI 1.1C, however, further restricts the "LC practice" to a shorter list that excludes the GMD "[kit]". In BFAS 2.1 (<http://www.oclc.org/bibformats/en/onlinecataloging/default.shtm#BCGFCEEG>), though, OCLC posits its own longer list of permissible GMDs in WorldCat, explicitly including "[kit]". Now, if you are following AACR2 and the LCRIs for "Items Made Up of Several Types of Material," the relevant rule is 1.10. Rule 1.10C2 outlines three ways of specifying physical descriptions for these sorts of resources:

- a) Give the extent of each part or group of parts belonging to each distinct class of material as the first element of the physical description (do this if no further physical description of each

item is desired). Optionally, if the parts are in a container, name the container and give its dimensions.

400 lesson cards, 40 answer key booklets, 1 student record, 1 teacher's handbook, 1 placement test ; in container 18 × 25 × 19 cm.

12 slides, 1 sound cassette, 1 booklet, 1 map ; in box 16 × 30 × 20 cm.

b) Give a separate physical description for each part or group of parts belonging to each distinct class of material (do this if a further physical description of each item is desired). Give each physical description on a separate line. Optionally, if the parts are in a container, name the container after the last physical description and give its dimensions.

Beyond the reading list [GMD] : guidelines for research in the humanities / C.P. Ravilious ; University of Sussex Library. – Brighton [England] : University of Sussex Library, Audio-Visual Materials Room [distributor], 1975

46 slides : col.

1 sound cassette (15 min.) : analog, mono.

Summary: The bibliographic control of the humanities, with special reference to literature. A typical research project is followed through. – Intended audience: Postgraduates and research students

Hot deserts [GMD] / Ruth Way. – London ; Toronto : Visual Publications, [1975?]

1 filmstrip (39 fr.) : col. ; 35 mm.

1 sound cassette (ca. 18 min.) : analog, mono.

4 study prints : col. ; 29 × 88 cm., folded to 29 × 44 cm.

1 v. (15 p.) ; 22 cm.

1 folded sheet (4 p.) ; 22 cm.

All in container 33 × 47 × 5 cm.

(The Earth & man. The Earth without man ; 4). – Pictures on filmstrip and study prints identical. – Cassette has automatic and manual advance signals

c) For items with a large number of heterogeneous materials, give a general term as the extent. Give the number of such pieces unless it cannot be ascertained. Optionally, if the pieces are in a container, name the container and give its dimensions.

various pieces

27 various pieces

42 various pieces ; in box 20 × 12 × 6 cm.

LCRI 1.10, however states: “LC practice for general cataloging: For items that are made up of two or more components, treat one component as the predominant component (1.10B); treat the other component(s) as accompanying material (1.5E). Do not apply 1.10C.” This particular LCRI is at least partly an outgrowth of the sorts of materials that LC does and does not catalog (and does and does not catalog according to AACR2 – as OLAC members know, LC uses AMIM for moving image materials, not AACR2 proper, for example). Which is why it is “LC practice for general cataloging” not to catalog anything that would fit under the GMD “[kit]” as an “Item Made Up of Several Types of Material” under 1.10, but rather as the “predominant component” with accompanying material. (Following me so far?) By sanctioning the use of the GMD “[kit]”, however, OCLC by implication must also be allowing users to ignore LCRI 1.10, thereby allowing us to describe kits in any of the three ways outlined in AACR2 Rule 1.10C2 proper (above). If you choose option (c), you may further describe the individual pieces to your heart’s content elsewhere in notes (500, 505, 520, whatever might make sense in your particular circumstances). This may be fudging a little, but the way the parenthetical in Option (a) is worded, you can also get away with further describing some, but not *each*, of the items if you need to.

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AACR2 Theory, LC Practice

Question: To follow up, it has always been my understanding that libraries cataloging at the national level (i.e., on OCLC) were expected to follow LC rule interpretations but were under no such obligation to follow LC *practices*, which simply document the local practices of the library in Washington DC. This is assuming that OCLC does not have a documented alternative practice, which OCLC contributors are obligated to follow. Is that not the general understanding?

Answer: In an attempt not to overload readers with even more detail than was already there in my comments, I conveniently lumped a lot of stuff under the phrase “historical contradictions between LC and OCLC practice,” and left it at that. But now that you’ve opened Pandora’s box, I’ll offer a little more detail and risk that overload. As those of us of a certain age will remember, the LCRIs evolved from internal LC documents, into documents shared with the cataloging community, into a de facto “national practice.” Part of that evolution also had to do with sometimes specifying certain LCRIs as “LC practice,” “LC/NACO practice,” “LC/CONSER practice,” (later) “LC/PCC practice,” and occasional other variations. I’m sorry to say that OCLC has been less than precise in BFAS 2.1 (<http://www.oclc.org/bibformats/en/onlinecataloging/default.shtm#BCGFCEEG>) in the section entitled “Resolving conflicts between practices,” in making little distinction between “LC practice” and the LCRIs generally.

Both OCLC and LC create rules for online cataloging. In general, follow LC practice when creating new records. If OCLC practice conflicts with LCRIs, follow OCLC practice. ... Libraries participating in cooperative programs with the Library of Congress (i.e., BIBCO, CONSER, NACO, PCC) must follow appropriate LCRIs for records and headings created as part of those programs.

Again, this is partly historical because the LCRIs began literally as (and were considered for a long time to be) “LC practice,” before there was a need to acknowledge what we might think of as those different “levels” of LCRIs. In that BFAS section (and sometimes elsewhere in BFAS and in other OCLC cataloging documentation), we point out where users are encouraged to follow what we too-loosely call “LC practice” or the appropriate LCRI. We also sometimes note where users may not, or should not, follow “LC practice” or the LCRI. We have not consistently made a proper distinction between the LCRIs in general and those that are labeled as “LC practice” or “LC/PCC practice” or whatever. Here is part of what LC says in the “Introduction” to the LCRIs:

[I]t is incumbent upon the Library of Congress to make decisions to provide common practice in order to share bibliographic and authority records for the common good, which may at times be at odds with local needs. One means of doing this is distinguishing in the LCRIs among practice that is applicable nationally, practice that is applicable only to LC, or practice that is applicable at some combined level, usually applicable to LC in combination with a formal program such as CONSER or NACO. Thus the introductory phrase "LC practice:" signals a practice applicable solely to LC; it is discretionary for other libraries. The phrase "LC/CONSER practice:" is applicable to LC and other members of CONSER but is discretionary for other libraries. A new phrase "LC/NACO practice:" was introduced in the summer of 1996. Practice introduced by this phrase is applicable to LC and to those libraries that are NACO participants contributing authority records to the national authority file.

In the “2002 Preface” to the LCRIs is this update: “... the glosses ‘LC practice,’ ‘PCC practice,’ or ‘LC/PCC practice’ are used to distinguish practices of these organizations from general national practice (see Introduction for fuller information). Note that ‘PCC practice’ replaces both ‘NACO practice’ and ‘CONSER practice’.” So part of what I was trying to say was pretty much what you’ve said. There’s some confusion, though, caused in part by OCLC’s tendency to refer to “LC practice” and the LCRIs synonymously, rather than consistently following the distinctions that evolved over time and that LC has described in the LCRI “Introduction” between what everyone should follow and what only certain categories of catalogers (LC, PCC, etc.) are required to follow. Needless to say, in the cooperative environment of WorldCat, it’s often a good idea to follow even many of those specialized practices, which is what OCLC often suggests to our users.

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Born to Link

Question: A question has come up about whether it is OK to insert a 776 field in an e-book record linking to a record for a printed version when they were not exactly identical. I realize that in most cases, this would never be an issue. Most e-book records are reproductions of books originally

published in print, so they would contain a linking field to whichever edition they corresponded to. But in a case when something is born digital and not an exact reproduction of any printed version for the same book, would it be incorrect to insert a 776 link back to a printed version of the book? In other words, the textual content might be the same, but it might not include things like pagination or the same illustrations might not correspond to any printed edition out there. This is sort of a hypothetical question, but we were just wondering.

Answer: Because my colleague Robert Bremer knows much more about those linking fields and their use than I do, I asked for his take on your question. Here is his response: "Yes, make the 776 link if the text is believed to be the same. There is always an expectation of the possibility that the formatting of the online vs. the print will be different or that one may have illustrations or advertising or supplemental text that the other does not in a particular case."

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Transparency in Coding Illustrations

Question: In Bibliographic Formats and Standards, field 300 (<http://www.oclc.org/bibformats/en/3xx/300.shtm>) gives an example of "transparencies" cited in a 300 field, but the page for the "Ills", Illustrations fixed field element (<http://www.oclc.org/bibformats/en/fixedfield/ills.shtm>) doesn't indicate how that could be coded in the 008 field.

Answer: A resource that was described as "7 transparencies (15 overlays)" in field 300 subfield \$a (to use the relevant example in BFAS field 300) would be coded on a Visual Materials format record, Type "g", TMat "t" (for "transparency"). The Visual Materials format does not itself have a specific means of coding the kinds of illustrations. The "Ills" fixed field element is valid only on Books format records (Type "a"). The coding there would depend upon what sorts of illustrations were present. In a case where transparencies were accompanying material to a book, let's say, and were specified in field 300 subfield \$e, any kinds of illustrations on the transparencies could be coded in the Books format "Ills" fixed field.

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Nothing for Overtime

Question: I have in front of me a set of DVDs whose total running time is 2515 minutes. If (and it's a big if) I were to catalog them as a multivolume set, the running time would have to go into the fixed field for the running time. The field has only room for three digits. How should we handle this?

Answer: Both MARC 21 (<http://www.loc.gov/marc/bibliographic/bd008v.html>) and OCLC's *Bibliographic Formats and Standards* (<http://www.oclc.org/bibformats/en/fixedfield/time.shtm>) say that if the running time exceeds three digits, you are to enter three zeros.

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DVD Dilemma

Question: We have DVDs that have a short video along with supporting material in PowerPoint and PDF. The physical item has “DVD Video” on it, so we are debating on whether we should call it a DVD-ROM or a DVD-Video in the 538 field. On top of this we are debating whether it should have a GMD of “[electronic resource]” or “[videorecording]”. These videos are used for training employees about stress, customer service, etc. Any help is appreciated.

Answer: First, you need to decide what is the main content of the resource. As you've described it, the video seems to be the main thing, so describe it as such: Type "g", TMat "v"; "1 videodisc ...", or "1 DVD-video" if your institution applies that option in 7.5B1, in field 300; "[videorecording]" as the GMD; video 007 field for the DVD. Include a Book 006 for the PDF text and an Electronic Resource 006 for the electronic aspects. Include a 538 describing requirements for the DVD-video and another 538 for the requirements of the PowerPoint and PDF files.

NEWS FROM OCLC

Compiled by Jay Weitz



General News

OCLC Releases Statement on Lawsuit

Larry Alford, Chair, OCLC Board of Trustees, and Jay Jordan, OCLC President and CEO, have released the following statement:

"On July 29, SkyRiver Technology Solutions and Innovative Interfaces, Inc. filed suit against OCLC, alleging anticompetitive practices. We at OCLC believe the lawsuit is without merit, and we will vigorously defend the policies and practices of the cooperative.

OCLC's General Counsel, working with trial counsel, will respond to this regrettable action by SkyRiver and Innovative Interfaces following procedures and timetables dictated by the court. This process will likely take months or even years, not days.

In the meantime, we want to assure the OCLC membership and all 72,000 libraries that use one or more OCLC services that these spurious allegations will not divert us from our current plans and activities. These include maintaining and enhancing existing services, pursuing an ambitious agenda in library research and advocacy, and introducing new Web-scale (cloud) services. Indeed, OCLC has been a global leader in providing cloud-based services for libraries since 1971, and the next generation of these services holds great promise for reducing member library costs.

It is worth noting that our current strategy represents a collective effort by librarians around the world, developed through ongoing dialogue and consultation with the Board of Trustees, Global Council, and Regional Councils in the Americas, Asia Pacific, and Europe, the Middle East and Africa. We will continue our active engagement with OCLC members and governance participants as, together, we move our cooperative forward.

Inclusion, reciprocity, trust and the highest standard of ethical conduct have guided the OCLC cooperative in the past and will guide us in the future. As always, OCLC's public purposes of furthering access to the world's information and reducing the rate of rise of library costs remain paramount."

New Record Use Policy, Shaped by Community, Effective August 1

A new WorldCat record use policy, developed by a Record Use Policy Council and informed by community input, has been approved by the OCLC Board of Trustees. *WorldCat Rights and Responsibilities for the OCLC Cooperative* became effective August 1, 2010. The new policy outlines the rights and responsibilities associated with stewardship of the WorldCat bibliographic and holdings database by and for the OCLC cooperative, including the use and exchange of OCLC member-contributed data comprising WorldCat. The policy was drafted by the Record Use Policy Council, a group of 12 library leaders charged by the OCLC Board of Trustees to craft a replacement for the *Guidelines for Use and Transfer of OCLC Derived Records*, which was developed in 1987. In April 2010, the Record Use Policy Council submitted to the library community and to the OCLC Board a draft policy that began a two-month period of community review and discussion. More than 275 comments were gathered via e-mail, phone, meetings and letters, in an online forum, and by monitoring blogs, discussion lists, and Twitter. At the end of May, community input was incorporated and a policy statement was submitted to the OCLC Board, which approved the revised document during its June meeting. The policy is based on the premise that OCLC members value WorldCat as a comprehensive, timely, and accurate reflection of the consolidated holdings of those members. The policy's intent is to encourage the widespread use of WorldCat bibliographic data while also supporting the ongoing and long-term sustainability and utility of WorldCat and of WorldCat-based services such as resource sharing, cataloging, and discovery. Because the data sharing environment is constantly and rapidly evolving, this new policy will be regularly reviewed to ensure its continued timeliness. To view the new policy, including a Frequently Asked Questions document and a comparison between the draft submitted for community review and the final document, visit <http://www.oclc.org/worldcat/recorduse/default.htm>.

OCLC and the Califa Library Group Announce Partnership

OCLC welcomes the Califa Library Group as the newest partner in the OCLC Partnership Program. As Partners, OCLC and Califa will collaborate on programs and activities to enhance services and expand educational opportunities to members of both organizations. This new partnership enables both organizations to explore new ways to anticipate and address the needs of shared members. Initiatives will include improving access to information to maximize the use of OCLC products and services, collaborating on online events and conferences with a focus on new technologies, and opportunities to expose new trends in funding and education. The Califa Library Group, a not for profit membership cooperative serving libraries and information organizations in California, has been an active participant in OCLC cooperative services such as cataloging with WorldCat and group services. As an OCLC Partner, Califa and OCLC will work together to share information, educate and inform members of both organizations for the benefit of libraries and their users.

OCLC and LYRASIS Develop New Partnership Program

OCLC and LYRASIS, the largest regional library membership organization in the United States, have signed a new partnership agreement that will provide increased consulting, education, and engagement programs for WorldCat and new cooperative Web-scale library management services. The new partnership will also streamline administrative services that will provide increased efficiencies and cost savings for member libraries. LYRASIS, created by the merger of SOLINET, PALINET, and NELINET, has had a strong, 35-year relationship with OCLC to provide cooperative service, support, and advocacy for libraries and consortia. The new partnership program, which went into effect July 1, 2010, builds on this foundation to provide member libraries with the next generation of cooperative library services and consulting. LYRASIS defined a new strategic direction in 2010 to deliver services that help transform libraries, and enhance content, operations, and technologies to meet the needs of tomorrow's library users. In support of this strategy, LYRASIS will partner with OCLC and its members to explore next generation bibliographic and resource sharing standards and services. OCLC and LYRASIS will begin providing programs to support these services in late summer 2010. The new partnership between OCLC and LYRASIS will enable both organizations to better focus on providing libraries with consulting, education, and engagement programs. This collaboration will help libraries more effectively deploy the cooperative Web-scale services that move back office operations online, thereby lowering the total cost of ownership for library management services and enhancing the user experience. OCLC and LYRASIS have jointly created strong administrative practices for ordering, billing, training, and support. As technology and new collaboration tools have evolved, OCLC has worked with LYRASIS and other Regional Network Partners to reduce administrative costs while delivering additional online services for members. This partnership includes additional administrative cost reductions for members, and new programs scheduled to rollout in 2011.

Cataloging and Metadata

Duplicate Detection and Resolution (DDR)

Beginning in 1991, OCLC used its Duplicate Detection and Resolution (DDR) software to match WorldCat bibliographic records in the Books format against themselves to find and merge duplicates. By mid-2005 when WorldCat migrated to its new platform, sixteen runs through WorldCat had been completed, resulting in the elimination of a total of 1.6 million duplicate records. In 2005, a project was started to re-invent the DDR software to work in the new environment and to expand its capabilities to deal with all types of bibliographic records, not just Books. This large multi-year project is now bearing fruit. Great improvements to our matching software, which are a key component of the new DDR, have regularly been incorporated into the batchloading process. This helps bring both DDR and batchloading processes into alignment as never before in dealing with the problem of duplicate records in WorldCat. In May 2009, the new software was put into production following rigorous planning, development, and testing. In addition to its ability to deal with continuing resources, scores, sound recordings, visual materials, maps, and electronic resources, as well as books, this new DDR is much more sophisticated than its predecessor in its power to distinguish legitimate matches from incorrect ones. It also has the flexibility to allow selection of certain categories of bibliographic records to target for deduplication.

- New software put into production beginning in May 2009, processing small subsets of WorldCat:
 - During the testing phase, roughly 500,000 records processed with roughly 15,000 duplicates merged (each merge individually examined).
 - During the testing period, we did lots of bibliographic record cleanup to increase matching accuracy.
- Full processing of WorldCat began in late January 2010 in two parallel processes:
 - Each day's new and updated records:
 - Entire WorldCat from Record #1 ("walking the database").
- Statistics at end of 2010 Fiscal Year:
 - Over 67 million bibliographic records processed.
 - Roughly three million duplicate records merged.

As you can imagine, the matching process is incredibly complicated. The original DDR developed in the late 1980s and early 1990s used a series of algorithms that compared fourteen descriptive elements gathered from both fixed and variable fields, then computed a similarity. Additionally, there were a set of about ten or so "flagged" conditions that prevent merges. When both the level of similarity and the flags determined that a merge was appropriate, the records were merged according to a hierarchy of Encoding Levels and other factors. Those fourteen elements included: cataloging library; LCCN; ISBN; government document classification number; media; author; title; statement of responsibility; edition statement; place of publication and publisher; publication date; number of pages or volumes; size; and series statement. Many of these elements comprised information gathered from multiple places in the record, with the degree of internal consistency factored in to the algorithm.

The new DDR is difficult to compare to the old one, partly because the capabilities and tools at our disposal now are so much greater than they were twenty years ago. We can now take advantage of the greatly expanded indexing capabilities of Connexion. We can perform all sorts of detailed analysis and comparisons of data that we were unable to do back then. Because we are now dealing with all bibliographic formats and not just Books, we are considering matching elements that were not relevant previously.

Of course, none of this means that the new DDR works perfectly. We have continued to look at samples of merged records to monitor how things are going. Whenever we find, or a user reports, an incorrect merge, we analyze the situation and try to correct it if possible. We also receive reports of so-called near-matches, records that fall just below the threshold of similarity or represent certain situations that we have chosen not to merge for one reason or another. As time permits, we do manual reviews of some categories of these records, manually merging those that should be merged. What we learn from these records also factors into the fine-tuning of our matching.

OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2010

On Sunday, May 23, 2010, OCLC implemented the changes related to the OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2010. This includes MARC 21 Update No. 10 (October 2009) and most of MARC Update No. 11 (February 2010), MARC Code List changes announced by LC between

July 2009 and April 2010, and user and OCLC staff suggestions. Many of the changes are related to the scheduled testing and possible future implementation of Resource Description and Access (RDA), the proposed successor to AACR2. OCLC Technical Bulletin 258, which presents the details, is available at <http://www.oclc.org/support/documentation/worldcat/tb/258/default.htm>. Among the points of interest:

- Bibliographic records:
 - The new codes “o” (Online) and “q” (Direct Electronic) for all existing “Form of Item” (OCLC fixed field element “Form”) elements.
 - New 007, 008, and 006 codes to account for previously unaccounted for media types and carrier types.
 - Field 040 subfield \$e now repeatable, plus code “rda” validated.
 - New 33X fields for Content Type (336), Media Type (337), and Carrier Type (338).
 - New 38X fields for attributes of musical works.
- Authority records:
 - Field 040 subfield \$e now repeatable, plus code “rda” validated.
 - New 336 field for Content Type.
 - New 37X fields for entity attributes, including Associated Place, Address, Field of Activity, Occupation, Gender, etc.
 - New 38X fields for attributes of musical works.
- Holdings records:
 - New 007 codes to account for previously unaccounted for media types and carrier types.
 - New 33X fields for Media Type (337) and Carrier Type (338).

Because of time restraints, OCLC has put off implementing subfield \$3 in Bibliographic and Authority fields 034 and subfields \$5 in Bibliographic fields 800, 810, 811, and 830. These will be included in the next OCLC-MARC Update. Additionally, OCLC must postpone implementation of the newly-defined fixed field element, Computer Files 008/23, 006/06 (Form of Item -- “Form”). Because this is a new position in both the CF Fixed Field, requiring a change to the CF workflow, and in the CF 006, necessitating a change to the dropdown box for the CF 006 guided entry, it must await a future version of the Connexion client, tentatively scheduled for late 2010 or early 2011.

Appropriate data conversions and re-indexing of WorldCat has already begun. All new searching and indexing capabilities; new fields, new subfields, new indicators; and new codes can now be used in both Connexion browser and Connexion client.

We did this OCLC-MARC Update on a much quicker schedule than the usual 12 to 18 months between MARBI decision and OCLC implementation. This time the MARBI to implementation was 4 to 10 months, including folding in the MARC 21 Update No. 11 quite quickly. Because of RDA, we had to make a lot of guesses about how data would be entered and used and how people might want to access it, especially regarding indexing of some of the new RDA elements. We have the two overlapping indexing teams, Bibliographic and Authorities, and we go through newly defined fields, subfields, and values to determine the needs for any new indexes and/or their incorporation into any already existing indexes. There is a

smaller group that makes decisions about conversions of both existing data and data that arrives via batch processes, and draws up specifications for any conversions. There's also a small group that discusses any card print issues; this time around, it was an interesting philosophical conundrum to think about the possibility of an institution both still receiving cards and planning to implement RDA.

OCLC Policy Statement on RDA Cataloging in WorldCat for the U.S. Testing Period

ALA Publishing has allowed free access to RDA from its publication date through August 31, 2010.

Timeline for testing:

- First 90-day period: testing participants will familiarize themselves with the content of RDA and the RDA Toolkit.
- Second 90-day period: testing participants will produce records
- Third 90-day period: Steering Committee for the testing will evaluate the results and produce its report, which will be shared with the broader library community (expected to be around April 2011).

Widespread adoption of RDA within the U.S. is not expected until after this evaluation report is released.

At that time, OCLC is committed to supporting OCLC members who wish to implement RDA in their libraries but *will not require that all libraries adopt RDA*. **OCLC urges that cataloging staff members take time to become familiar with the content and use of RDA before beginning the creation of RDA records.**

- LC has made available a variety of training materials at:
<http://www.loc.gov/catdir/cpso/RDAtest/rdatraining.html>.
- LC describes the test methodology and posts other test documents at
<http://www.loc.gov/bibliographic-future/rda/>.

General guidelines on editing records:

- Do not change an existing full-level master record, for materials other than continuing resources, from AACR2 to RDA or from RDA to AACR2.
- Minimal-level or less-than-minimal level records may be changed from AACR2 to RDA when being upgraded to full-level; they should not be changed back to AACR2.
- If a record created according to either AACR2 or RDA already exists in WorldCat, do not create a duplicate cataloged according to the other code.

For additional details, please see the "OCLC Policy Statement on RDA Cataloging in WorldCat for the U.S. Testing Period" at <http://www.oclc.org/us/en/rda/policy.htm>.

Connexion Client Version 2.20: Released 2010 June 21

Connexion client Version 2.20 is a 32-bit and 64-bit compatible version of Connexion client that will work with 64-bit versions of Windows XP, Windows Vista, and Windows 7. The only change in this version is the addition of 64-bit compatibility; only users who want to run Connexion client under 64-bit versions of Windows need to upgrade to this version. OCLC will continue to support Connexion client 2.10 for all other users. Connexion client is the Windows-based interface to Connexion. This announcement has no effect on the Connexion browser, which is the Web-based interface to Connexion. Information about Connexion client and a link to download the software is at:

<http://www.oclc.org/connexion/interface/client/enhancements/recent.htm>. The upgrade instructions are at:

http://www.oclc.org/support/documentation/connexion/client/gettingstarted/gettingstarted/#update_client_fm.

Connexion Client Version 2.30: Scheduled Late 2010/Early 2011

Connexion client version 2.30 will include enhancements to the existing functionality. We have not finalized all of the details of what changes will be included, but it will include links to the RDA Toolkit. More information will be announced at a later time. Version 2.30 will be compatible with both 32-bit and 64-bit versions of Microsoft Windows. All Connexion client users will be required to upgrade to version 2.30 after it is released. OCLC will determine the end of life date for versions 2.10 and 2.20 when version 2.30 is released. OCLC expects to release Connexion client 2.30 in late 2010 or early 2011.

Expert Community Update

In response to requests from the cataloging community, OCLC introduced the Expert Community Experiment, which ran from February-August 2009. Members with full-level cataloging authorizations were given the ability to improve, upgrade, and make more changes than previously to WorldCat master records. The Experiment was a success, and all functionality continues as part of the Expert Community.

- During the six-month “Experiment” period, 108,766 Expert Community replaces were done, an average of over 18,000 per month, by just over 1000 institutions each month.
- Between August 2009 and May 2010, the number of institutions participating per month had actually risen to an average of 1023; over 219,000 replaces had taken place, a little under 22,000 per month.

We’ve also seen a dramatic decrease in the number of change requests, both paper and electronic, that we receive. Cutting that by more than half from FY 2008 to FY 2010 has allowed us to focus on other clean-up activity, especially manual review of DDR “near matches.”

The National Diet Library of Japan to Add Records to WorldCat

OCLC and the National Diet Library (NDL) have signed an agreement to work cooperatively to make more than 5 million records from NDL more visible and accessible to scholars and researchers worldwide through WorldCat. The National Diet Library has been using WorldCat for current cataloging of Western languages materials since 2007. This new agreement provides for the contribution of the complete contents of the JAPAN/MARC database, the official national bibliography of Japan, to WorldCat on a regular basis. NDL and OCLC will work together to add the 5 million records to the WorldCat database. Once records are added to WorldCat, they are more visible and accessible to Web users worldwide through WorldCat.org, the destination for search and discovery of library materials on the Web. Kinokuniya Company Ltd., OCLC’s distributor in Japan for 24 years, helped to facilitate this agreement.

OCLC Canada LTS Library Technical Services to Catalog for Ontario Colleges

OCLC Canada LTS Library Technical Services will perform full cataloging and physical processing of library materials for 18 of the 24 publicly-funded Ontario colleges, under the terms of a consortial agreement negotiated on behalf of the colleges by the Ontario Colleges Library Service (OCLS). Established in 2009, OCLS is responsible for providing a suite of services to the libraries of the 24 colleges of applied arts and technology throughout the province. Beginning in March 2010, library materials for the 18 participating colleges began to be shipped from various vendors directly to OCLC Canada LTS for MARC cataloging and physical processing. Once fully implemented, OCLC Canada LTS will catalog and process an estimated 40,000 items annually. OCLC Canada LTS will work with OCLS to retrospectively update the holdings in WorldCat for each of the participating college libraries.

Management Services and Systems

Web-Scale Library Management Services Available July 1 to Early Adopters

OCLC is moving its Web-scale library management services from pilot phase to production with the release of acquisitions and circulation components to a limited number of early adopters. Beginning July 1, 2010, OCLC is working with libraries that are interested and prepared to implement Web-based services for acquisitions and circulation. This will be followed by successive updates for subscription and license management, and cooperative intelligence—analysis and recommendations based on statistics and workflow evaluation among participating libraries. The cloud computing environment and agile development methodology will facilitate incremental updates while minimizing impact to library operations. Faced with scarce resources, disparate systems and local maintenance issues during a time when demand for library services has never been higher, OCLC members have made it clear that new, innovative responses are needed to meet these challenges. For the past eight months, OCLC has worked with an Advisory Council and six libraries and library groups as pilots for Web-scale management services. These groups have provided advice to OCLC on an overall direction, offered new ideas that were not in the original development plan, and validated strategic positioning for the service. OCLC Web-scale Management Services offer a next-generation choice for traditional, back-office operations. Moving these functions to the Web alongside cataloging and discovery activities allows libraries to lower the total cost of ownership for management services, automate critical operations, reduce support costs, and free resources for high-priority services. It will also allow libraries and industry partners to develop unique and innovative workflow solutions that can then be shared across the profession. More information about OCLC Web-scale management services can be found at <http://www.oclc.org/webscale>.

New EZproxy Reference Manual Now Available

EZproxy now has significantly updated documentation. The all-new documentation manual (PDF) is now available for download. The EZproxy Reference Manual now supplies instructions for more than 100 separate directives within EZproxy, making it the most comprehensive collection yet of database configuration and available stanza information. While the reference manual is meant to be comprehensive, it should also be viewed as a work in progress. Our goal is to update and add

information continually, until all directives and options are documented. Subsequent editions will include version numbers to denote updates and a page to denote significant changes. EZproxy administrators are encouraged to send additions and/or corrections for the EZproxy Reference Manual to ezproxy@oclc.org. Download the reference manual PDF now at http://www.oclc.org/support/documentation/ezproxy/pdf/ezproxy_referencemanual.pdf.

Digital Collection Management

WorldCat Digital Collection Maximizes Web Visibility of Digital Content

Repository managers from libraries, museums, archives, and other cultural heritage and research institutions can now contribute metadata records for digital materials to WorldCat using the new, enhanced WorldCat Digital Collection Gateway, increasing visibility and accessibility of special collections, institutional repositories, and other unique digital content to Web searchers worldwide. In July 2009, OCLC introduced the WorldCat Digital Collection Gateway to users of OCLC CONTENTdm Digital Collection Management software. Based on the OAI protocol, the Gateway enabled CONTENTdm users to upload the metadata of their digital collections to WorldCat. Recent enhancements to the Gateway now make it possible for any OAI-compliant repository to contribute metadata to WorldCat to gain broader visibility for their digital content. The enhanced WorldCat Digital Collection Gateway is freely available to institutions interested in increasing the visibility of their digital content through WorldCat, the comprehensive source for discovery of materials held by libraries, museums, archives, and other cultural heritage and research institutions. Visibility is increased through WorldCat.org, the Web destination for discovery of collections, and also through partnerships with Google, Yahoo, and an active and growing library developer network. Designed for self-service use, the WorldCat Digital Collection Gateway is a Web-based tool that enables repository managers to customize how their metadata displays in WorldCat.org and determine their metadata harvesting schedule—monthly, quarterly, semi-annually, or annually. Additionally, it applies their institution's "holdings symbol" to their records, thereby highlighting the unique information resources their institution is contributing to WorldCat. For more information, visit WorldCat Digital Collection Gateway (<http://www.oclc.org/us/en/gateway/default.htm>), or send an e-mail to digitalcollections@oclc.org.

The Latest Release of CONTENTdm Includes the New Flex Loader

OCLC has released CONTENTdm 5.4, the latest version of the popular CONTENTdm Digital Collection Management Software that includes the new CONTENTdm Flex Loader along with other enhancements. Designed to complement the CONTENTdm Project Client, Flex Loader is a new Windows desktop application. It enables users to efficiently batch import large quantities of XML data in the METS/ALTO newspaper format, or the METS/ALTO monograph and eBook format, to their CONTENTdm collections. XML file formats supported by Flex Loader include the NDNP (National Digital Newspaper Program) and CCS (Content Conversion Specialists) docWorks newspaper and monograph. Compound object-level metadata and page-level metadata mapping is supported, along with support for newspaper article segmentation. Other highlights of CONTENTdm 5.4 include new options for editing metadata for compound objects. All pages of a compound object can now be viewed and edited in a spreadsheet,

giving users improved efficiency when editing compound objects. Additionally, the Upload Manager has been improved to allow users more control of the upload process. As the upload queue is being processed, progress indicators show detailed progress of each item and the entire queue. Users also have the option to cancel the upload—either a single item or all items—and return items to the project workspace. Status of the upload persists across sessions of the Project Client, letting users continue to work while uploads progress in the background. For those CONTENTdm users with very large digital collections, CONTENTdm 5.4 includes a new version of the FIND search engine, used by CONTENTdm (and WorldCat.org) for indexing and searching. The new version supports long-term scalability for sites with rapidly growing full-text collections by supporting automatic index partitioning along with tools for configuration and monitoring. This integrated feature will support scalability for growing collections now and in the future. The 5.4 release, including the new Flex Loader, is available to current CONTENTdm licensees at no additional charge. CONTENTdm is used by more than 2,000 institutions worldwide to manage millions of digital items. To see how some of these institutions are using CONTENTdm, visit www.oclc.org/contentdm/collections/.

Content and Collections

OCLC and ebrary Sign Agreement to Add Ebook Records, Links to WorldCat

OCLC and ebrary, a leading provider of digital content products and technologies, are working together to add records for the ebrary ebook catalog to WorldCat. ebrary's growing selection of over 170,000 authoritative ebooks in all subject areas will be represented in WorldCat with a link to the ebrary platform. Libraries that subscribe to ebrary ebooks can have ebrary set holdings automatically for the relevant records. WorldCat Local authenticated users will then be able to link directly to ebrary ebooks from the corresponding WorldCat records. Web users searching through WorldCat.org will be able link to the ebrary platform to preview the ebooks and find out how their library might be able to access them. Libraries may choose to share records for their own theses and dissertations, special collections, and other electronic documents hosted by ebrary.

Resource Sharing and Delivery

National Library of China Shares Collection Via WorldCat Resource Sharing

The National Library of China will share its rich collections with libraries and researchers around the world as a new participant in the OCLC WorldCat Resource Sharing service. Since November 2009, 2.4 million records from the National Library of China have been added to WorldCat. With those records in WorldCat, resources from the National Library of China are more visible worldwide through the Web. Once records from the National Library of China are discovered in WorldCat, researchers and scholars will be able to access and obtain these important Chinese materials through WorldCat Resource Sharing. The National Library of China, which celebrated its centennial in September 2009, is the largest library in Asia with a collection of 30 million volumes and articles. The library was established in the final year of the Qing Dynasty, inheriting the Imperial Wenyuange Library collection of the Qing Dynasty, which includes books and manuscripts since the Southern Song Dynasty. In addition to collecting and preserving records of Chinese culture, the National Library of China provides document consulting

services to leaders of the Chinese government to facilitate their decision making, as well as to support research and teaching in China.

Web and Data Services

OCLC Releases MARCView and MARConvert as Open Source Software

OCLC and Systems Planning are pleased to announce the donation of MARCView and MARConvert to OCLC, and OCLC's release of MARCView and MARConvert as open source software under the Apache 2.0 license. MARCView and MARConvert software, developed by Systems Planning of Bethesda, Maryland, USA, are widely-used applications designed to assist librarians and developers working with MARC records. MARCView provides a user-friendly interface to navigate and display individual MARC, MARCXML, and UNIMARC records. MARConvert™ supports the conversion of bibliographic or authority records into or out of MARC21, UNIMARC, or MARCXML and can also convert MARC records from one character set to another. Stephen Toney, President and Chief Technology Officer of Systems Planning, donated the software to OCLC. The MARCView and MARConvert source code has been added to OCLC's open source repository, and the library developer community is encouraged to maintain and enhance the services. The MARCView and MARConvert software is available for download, along with some documentation, on the OCLC Developer Network Web site (http://worldcat.org/devnet/wiki/Main_Page).

WebJunction

IMLS Grant to WebJunction, State Library of North Carolina to Help Unemployed

The Institute of Museum and Library Services (IMLS) has awarded OCLC WebJunction and the State Library of North Carolina (SLNC) a grant to continue work to provide library-based employment services and programs to assist the unemployed. The \$940,750 grant will fund work to conduct an impact and needs assessment on unemployment in all United States regions, and create a corresponding curriculum that can be tailored to meet local needs so that libraries are better equipped to meet the needs of the unemployed. WebJunction, OCLC's online learning community for library staff, and SLNC will conduct a train-the-trainer workshop and up to 75 local workshops for public library staff working in the highest unemployment areas. They will deliver presentations at local conferences and make a free version of the workshop available online, in addition to hosting a Web site for ongoing communication among state libraries. This project follows a previous IMLS funded project launched by WebJunction and SLNC to gather and share best practices for providing library-based employment services and programs.

WebJunction–Florida Offers Learning, Sharing to State's Library Staffs

WebJunction, the leader in online learning for library staff, has partnered with the State Library and Archives of Florida to launch the new WebJunction–Florida. Library staff in Florida can now access courses at no individual cost through the WebJunction community, and use the site to keep their skills up-to-date and help their libraries respond to current patron needs. As part of this online learning community, members can take courses on a wide range of technology and library subjects—as well as

connect with other library staff—creating an engaging learning experience. This partnership takes advantage of WebJunction's Custom Catalog service, designed to maximize the customization and reach of training through a centralized training catalog with streamlined registration for all users. All WebJunction–Florida participants will be able to access courses, regardless of geographic location or library size. Additionally, as a part of the Custom Catalog, WebJunction–Florida will be able to add unique, Florida-specific courses to the extensive course offerings from WebJunction that form the foundation of the catalog. The WebJunction–Florida site is available now at <http://fl.webjunction.org/>.

OCLC Research

University of Sheffield, OCLC Funded to Explore Recommender System

The University of Sheffield, in collaboration with OCLC Research, has been awarded funding from the UK Arts and Humanities Research Council to explore a library catalogue recommender system based on the requirements and preferences of users. The joint Doctoral Award will pay for a dedicated Ph.D. student to work for three years with Dr. Paul Clough and Ms. Barbara Sen, lecturers in The Information School at the University of Sheffield, and Dr. Lynn Silipigni Connaway at OCLC, investigating the applicability of the recommender concept to the domain of the library catalogue. Recommender systems suggest items to users that are likely to be of interest to them but have not yet been considered. Sites like Amazon.com use similar systems to great effect. The goal of the project is to follow a “user-centered” approach to the development of a library catalogue recommender system, establishing user needs and preferences before mining the bibliographic data within the WorldCat database to retrieve similar journals, books, digital media, and video records that may be of interest. As the world's largest library catalogue, WorldCat allows the researchers to experiment with various, large-scale sources of evidence on which to base recommendations, thereby not restricting the recommender system to the holdings and circulation activities of a single institution. Results from this project will be of great benefit to academics, practitioners, and library users alike. More information about the funding for the studentship is available at <http://ir.shef.ac.uk/cloughie/resources/ahrc-cda2010.html>.

OCLC QC TIP OF THE MONTH

Submitted by Luanne Goodson
Consulting Database Specialist
OCLC Quality Control Section

Duplicate Detection and Resolution (DDR) software

OCLC thanks everyone who adds new records to WorldCat. OCLC has spent the past several years working on a re-implementation of its Duplicate Detection and Resolution (DDR) software in the Connexion environment and to expand its capabilities to deal with all types of bibliographic records.

Between May 2009 and January 2010, OCLC ran small subsets of WorldCat against the live database in order to fine tune its algorithms, examining each resulting merge and learning from both the successes and the failures.

The new DDR software is now in full operation. DDR began running through the full WorldCat database (beginning with OCLC #1) on Feb. 2, 2010. In addition, a separate process that examines selected new records and replaced records from a day's journal files began running Jan. 26, 2010. As of the end of June 2010, 2,919,942 duplicate records have been removed out of 67,179,212 records processed.

DDR processing will continue for a number of months. As a result, you will notice fewer duplicates, particularly for printed music, sound recordings, and audiovisual materials since the original DDR software only dealt with records for books.

Like all automated processes, this new DDR will make occasional errors in spite of our best efforts to minimize such cases. Thank you for reporting erroneous merges. OCLC staff will examine the records in question, reverse any merge deemed to have been inappropriate, and try to assure that such incorrect merges do not occur again. One or more of the records may be edited so that our algorithms are better able to identify important differences. Additionally, we will determine if we can learn something more general from such instances and further refine our algorithms to reduce such errors in the future.

We urge users to help us make this process more effective by re-searching your title immediately before entering a new record into WorldCat, especially if the record was previously in an Online or Local Save file. Duplicates reduce the efficiency of the database, so please always verify that a record has not already been added by another library.

For information on When to input a new record please see Bibliographic formats and standards Ch. 4 <http://www.oclc.org/bibformats/en/input/default.shtm>

For more information about DDR please see <http://www.oclc.org/worldcat/catalog/quality/ddr/default.htm>

Duplicates and reports on possible erroneous merges can be reported to bibchange@oclc.org, or by using the Action Menu--Report Error function while viewing a bibliographic record in Connexion. This function opens a window which is free-text, allows users to have a copy sent to their own email address,

and includes a snapshot of the record as it appeared when the function was invoked. Additionally there is a webform specifically for reporting duplicates found here under Forms:
<http://www.oclc.org/us/en/toolbox/default.htm>

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Editing capabilities and master records in WorldCat

There are many different types of editing capabilities available to the average user of OCLC's Connexion cataloging service, most of which have been in place for decades. Connexion documentation explains in full the specifics of replacing master records, as well as the type of upgrades libraries can perform based on the cataloging level of their OCLC authorization number. Please see this page for the Client http://www.oclc.org/us/en/support/documentation/connexion/client/cataloging/bibactions/#cat_act_replace_masterbibrec.htm and this page for the Browser http://www.oclc.org/us/en/support/documentation/connexion/browser/cataloging/actions_bib_records/default.htm#rc-rec-submit

Minimal-Level upgrade, Database Enrichment, and Enhance capabilities have been in place for many years. In the case of Database Enrichment, the system compares what you have done in terms of adding, editing, or deleting fields using the information that is contained in the chart in section 5.3 of Bibliographic Formats and Standards (<http://www.oclc.org/bibformats/en/quality/default.shtm#databaseenrichment>). If the changes match the chart, they are counted as a Database Enrichment replace. If they do not and the record falls into the categories that can be replaced under the Expert Community Program, the changes are counted as an Expert Community replace.

The Expert Community Program is the newest addition to the range of upgrades available to Connexion users. It allows users with Full-Level cataloging authorizations and higher to make additions and changes to almost all fields in almost all records; no special (or additional) authorization is required. The overriding principle of the Expert Community is: "First, do no harm." Please use the same care in editing an existing master record as you would use in creating a new record. A second overriding principle is: "If in doubt, DON'T." For more information, including the Guidelines for Experts document and previously recorded web sessions go to the Expert Community page (<http://www.oclc.org/worldcat/catalog/quality/expert/default.htm>)

We hope your institution is using these capabilities to improve and upgrade WorldCat master records to a degree never before available.

If you would like to track your own institution's statistics there is a general report available under OCLC Usage Statistics on the Browser site <http://connexion.oclc.org/> or for more detailed information on the specific types of changes made (i.e. Database Enrichment, Minimal-level upgrade, etc.) there is the OCLC Product Code Detail Usage Report available via OCLC's Product Services Web (<http://psw.oclc.org>).

Here are instructions for retrieving it:

- On the Product Services Web home page, click on "download records and reports"
- In the "Reports and Statistics" list, click on "OCLC Product Code Detail Usage Report" (about two-thirds of the way down the list)

- At the prompt to log on, enter the authorization and password that you use to access Connexion
- You can either view the report on your screen or download it as a text file
- Expert Community Experiment replaces are identified by Product Code ONT6390
 - Database Enrichment replaces by Product Code ONT2565
 - Minimal-level Upgrades by Product Code TOC3491
 - Enhance by Product Code ONT2571 and
 - National Enhance by Product Code ONT2570
- If a product code does not appear on your institution's report then no applicable replaces were done for that category

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OCLC Fixed Field and MARC Codes

The supporting documentation for filling out the OCLC Fixed Field in WorldCat bibliographic records can be found in OCLC's Bibliographic Formats and Standards (BFAS) <http://www.oclc.org/bibformats/en/fixedfield/default.shtm>. Each element (which is actually a 008 field byte) is linked to BFAS. Simply click on the label and you will be taken to the appropriate BFAS page.

Many codes must be retrieved from MARC documentation; BFAS is meant to be used in conjunction with MARC Standards. The OCLC Fixed Field element "Lang" [Language Code] <http://www.oclc.org/bibformats/en/fixedfield/lang.shtm> is one such example. Although Connexion Client has pull-down menus to assist users these menus only provide the code. To be sure you are selecting the correct code, consult the MARC Code List for Languages <http://www.loc.gov/marc/languages/langhome.html>

While most language codes are mnemonic, there are some exceptions which frequently cause trouble for users. Three of these are:

- Romanian (rum) as opposed to Romany (rom)
- Basque (baq) vs Basa (bas)
- Mandarin (chi) vs. Mandingo (man)

Note that both Cantonese and Mandarin are dialects of Chinese and are coded as 'chi'

Another Fixed Field element which requires consultation of a list is "Ctry" [Country of Publication, etc.] <http://www.oclc.org/bibformats/en/fixedfield/ctry.shtm>. Connexion Client has a pull-down menu to assist with entering the code, but the definition of each code is in the MARC Code List for Countries <http://www.loc.gov/marc/countries/>. For places of publication within the United States, use a code for the specific state; use a code for the specific province if the place of publication is within Canada. For items published in Australia, use either the three-character codes for Australian states and territories or the two-character code *at* for Australia. In the three-character codes, the first two characters represent the state or territory and the third character represents the country. Most other countries have two character codes.

Please send any questions or concerns to: askqc@oclc.org

OLAC MEMBERS:
IS YOUR DIRECTORY INFORMATION CORRECT?
CHECK THE ONLINE DIRECTORY

The Directory can be found on the OLAC Website at:

<http://olacinc.org/drupal/?q=node/9>

If you have forgotten your Username or password please contact:

Teressa Keenan

Teressa.keenan@umontana.edu

OLAC Web Page & OLAC-L Administrator

Members can search the OLAC Membership Directory for a name, state, e-mail or type of affiliation. Separate boxes for "state" and "affiliation" can also be used as filters to help narrow the searches further, if desired.

Check out your information and send corrections to:

Nathan Putnam

OLAC Treasurer

George Mason University Libraries

440 University Drive, MS 2FL

Fairfax, VA 22030

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MEMBERSHIP RATES

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Contributing Membership	One year (only)	\$50.00
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Personal Memberships	One year	\$20.00
	Two years	\$38.00
	Three years	\$55.00

Institutional Memberships	One year	\$25.00
	Two years	\$48.00
	Three years	\$70.00

Other Countries

All Memberships	One year	\$25.00
	Two years	\$48.00
	Three years	\$70.00

To apply for membership, print a copy of the page above, or go to <http://www.olacinc.org/drupal/?q=node/420>.

1. Fill out the form
2. Select the amount that you are enclosing
3. Pay by credit card/PayPal account or make checks/ money orders (**in U.S. funds only**) payable to **ONLINE AUDIOVISUAL CATALOGERS, INC** and
4. Submit online or mail to:

Nathan Putnam
OLAC Treasurer
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440 University Drive, MS 2FL
Fairfax, VA 22030