

OLAC Newsletter
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December 2004

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FROM THE EDITOR

Jain Fletcher

This final issue of 2004 follows the very successful OLAC Conference in Montréal. Along with nearly a full complement of regular and semi-regular offerings, this issue is largely devoted to reports about and related to the Conference. These include, of course, the minutes of the OLAC meetings held at the Conference (CAPC, Executive Board and Membership). Moreover, there is a highly streamlined version (due to space considerations) of the OCLC News, the full version having been compiled by Jay Weitz as a Conference handout. But most of all, there are the reports of the Conference activities themselves.

Jan Mayo, the Conference Reports Editor, started her work months ago, assigning reporters to the full line-up of the Conference offerings. Assistance in this effort came from Mary Curran of the University of Ottawa, a member of the Program Committee, who helped Jan identify some of the potential reporters and was instrumental in garnering a French language version of one of the French-speaking sessions. Following the Conference, Jan kept a strict deadline on submissions and then edited all of them into a single document. The full set includes the 2-day pre-conference workshop, two plenary sessions, multiple workshops, two showcase sessions, a panel discussion, poster sessions, round tables, and "birds of a feather" sessions. There is also a perspective on the Conference from the OLAC Scholarship recipient, Jaime Anderson.

Jan was phenomenally successful, ensuring coverage of a more complex set of meetings than OLAC has ever held. So successful, in fact, that her final submission was 33 full-size pages long. By itself, the set of reports would convert into nearly 60 pages when put into the *Newsletter* format. This is quite long; if it had been *anything* but the once-every-other-year Conference reports, it would have been severely edited. However, I could not, in good conscience, reduce the contributions of each of the reporters about *this* topic just to save space. Neither could I have put out an extra bulky issue, considering all the other contributions needed for it (which would have resulted in higher production expenses and mailing costs). Finally I arrived at a solution to this dilemma : the Conference Reports will be broken into two "installments" for the print version--one in this issue and the other in the June 2005 issue. However, the electronic version of the December issue will carry the entire set of reports. Only after the second installment appears in the June print version will the online version split the reports into two "installments", thereby bringing the online version back into sync with the print version. Until June then, if you are looking for

the full set of reports, please refer to the OLAC Website
<<http://www.olacinc.org/conferences/2004.html>>.

FROM THE PRESIDENT
Robert Freeborn

With both the Canadian and the United States Thanksgivings in our recent memories, I want to take this opportunity to thank everyone who helped make the 2004 Montréal Conference an unqualified success. In homage to the Academy Awards experience, I intend to thank as many people by name as possible.

Firstly, I want to thank the following people who helped organize the Conference. The Program Committee (Mary Curran, Anne Draper, Elizabeth Icenhower, and Pat Riva) and the Local Arrangements Committee (Nancy Beland-Akong, Bobby Bothmann, Betsy Friesen, Lesley Lawrence, Laura May, and Sharon Rankin) for all of their hard work in arranging the Conference hotel, the pre-conference tours, the reception at the McCord Museum, and the multitude of interesting and educational discussions and workshops. A tremendous "Thank you!" goes out especially to Conference Co-Chairs Lisa O'Hara and Marc Richard for their leadership and commitment throughout the entire process.

Secondly, I want to thank the following speakers for sharing their time and expertise with us: Carol Baker, Liliane Bédard, Allyson Carlyle, Claude Fournier, Gaston Fournier, Rachel Gagnon, Trina Grover, Lynne Howarth, Karen Jensen, Katherine Kasirer, Mireille Laforce, Marsha Maguire, Robert Maxwell, Chris Oliver, Daniel Paradis, Guy Teasdale, Jay Weitz, and Linda Woodcock. Your presentations and workshops helped to make this Conference one of the best ever.

Finally, I want to thank everyone who was able to attend. For our first Conference outside the United States, we had 220 registrants, with some coming from as far away as Hong Kong, Qatar, Singapore, South Africa, South Korea and Thailand. As the sole AV cataloger at my institution, it is always wonderful to get together with others and discuss the problems facing us on a daily basis. I am hoping to see even more of our membership at our Conference in 2006 (at a site to be named later... watch this space).

TREASURER'S REPORT
First Quarter and Year-to-Date
Through September 30, 2004
Bobby Bothmann, Treasurer

	1st Quarter July-Sept.	Year-To-Date
OPENING BALANCE		\$4,593.77
INCOME		
Memberships	\$316.00	\$316.00
Back Issues	11.00	\$11.00
TOTAL	\$327.00	\$327.00
EXPENSES		
ALA	400.00	\$400.00
Stipends	\$200.00	\$200.00
Postage & Printing	\$1,608.52	\$1,608.52
TOTAL	\$2,208.52	\$2,208.52
CLOSING BALANCE		\$2,712.25

MEMBERSHIP total for 2004

Personal:	406
Institutional:	239
Total:	645

**ONLINE AUDIOVISUAL CATALOGERS
CATALOGING POLICY COMMITTEE (CAPC)
OLAC CONFERENCE
Montréal, Canada
October 2, 2004**

Minutes

CAPC Members present: Lisa Bodenheimer (Chair), Lynnette Fields, Sandy Roe, Linda Seguin, and Kelley McGrath. There were a total of 30 attendees (including CAPC members).

1. Welcome and Introductions

2. Approval of Minutes

The minutes from the CAPC meeting held on June 25, 2004 at the ALA Annual Conference in Orlando, Florida were approved.

3. Announcements (L. Bodenheimer)

CAPC is looking for two new members and one intern. Terms would start after June 2005. Members serve a two-year term; interns serve a one-year term. Requirements include 3 years of current audiovisual cataloging experience and experience using an integrated library system. Appointments will be made at the ALA Midwinter Conference in Boston. Resumes and letters of application should be given to Lisa Bodenheimer or Robert Freeborn.

Robert Bratton, who edits "Authority Tools for Audio-Visual Catalogers" <<http://www.olacinc.org/capc/authtools.html>> is looking for reviews of new tools. Lisa Bodenheimer has his contact information.

4. Reports and Discussions

- a. *Subcommittee on Source of Title Note for Internet Resources (L. Bodenheimer for S. Miller)* <<http://www.olacinc.org/capc/stnir.html>>

Currently the Subcommittee is revising the document to update terminology and to give examples and rules. The Subcommittee sent out a call for comments to CAPC and to SCCTP in order to update training

materials. Few comments were received, but those that came were generally favorable. The potential outcome of this effort will be a "best practices" document.

Some changes need to be made. Modifications for serials are needed. There also has to be clarification of when to use "caption" instead of "Web page" or "home page".

After the Conference, the document will be posted to the OLAC List for further comment. The Subcommittee hopes to have the first draft of the document ready for ALA Annual in June 2005.

Discussion included ideas about other groups to which the document should be presented including being posted on Autocat and brought forward to the Electronic Resources Discussion Group at Midwinter; also, representatives of BIBCO and CONSER should be approached.

The Subcommittee also requested a volunteer from CAPC to become an additional member.

b. *Non-human actors (L. Bodenheimer for G. de Groat)*

This initiative is a response to a proposal by Nancy Olson to make an allowance for non-human characters to be name added entries instead of subject entries. The response, written by Greta de Groat, Lynnette Fields, and Lisa Bodenheimer suggests three possible options:

1. Have all the names of animals, imaginary or legendary characters and deities tagged 100 in the authority records, but formulated according to subject rules and residing in the subject file.
2. Have animal names governed by name rules (AACR2), able to be used as added entries when appropriate, but have imaginary names covered by subject rules, all to be tagged 100.
3. Have the names of individuals of all sorts governed by name rules (AACR2) and reside in the name authority file.

The response was sent to Nancy Olson for comment, but she has not yet responded. After Nancy Olson comments the response will be sent to the OLAC List for comment.

c. *FAQ/Best Practices (L. Seguin)*

Cathy Gerhart and Chris Fox joined this Task Force. Its goal is the creation of an online FAQ, with a schedule of ongoing maintenance, to be placed on the OLAC Website.

d. *CAPC Resource Maintenance Task Force (S. Roe)*

This Task Force determined that the following CAPC resources need ongoing maintenance: documents from any task force with an ongoing charge, any task force with an uncompleted charge, and any subcommittee with an ongoing component in their charge. It is recommended that maintenance in each of the above cases is the responsibility of the Chair or Chairs of the Task Force or Subcommittee.

CAPC resources that have a maintenance trigger in place include: "About CAPC" (when the bylaws change), "Members" (after new members are appointed), and "Minutes" (when new minutes are ready to post).

Resources that do not need maintenance include Task Forces and Subcommittees that have completed their assignment, and publications that lack a training element.

CAPC resources that may need future maintenance and/or removal include superseded training presentations and training guides. Discussion included the suggestion that training materials should be archived because even superseded materials may have some documentary value. It was noted that after 2007, with the advent of AACR3, large amounts of the CAPC training materials may need to be archived. It was also noted that Sue Neumeister can tell how many hits a Web page has had, which may help determine whether it should be maintained or archived.

It was suggested that the CAPC Resource Maintenance Task Force become a standing committee to offer oversight of maintenance. There was also a request for volunteers to become members of this group.

e. *Additions to Personal Names Task Force (L. Bodenheimer for I. Wolley, G. de Groat)*

A proposal was sent to CPSO for expanding the instances in which the addition of a profession could be made to personal names, expanding the

exceptions granted in LCRI 22.19. Barbara Tillett responded to the proposal, saying that it would not be appropriate to do so and further stated that the current exception for musicians is a historical quirk that is "an ill-conceived exception". It was suggested that the proposal and response be posted to the OLAC List to see if there is sufficient interest to pursue this rule change. CAPC will also contact ARLIS and the Music Library Association Cataloging Committee to see if there is interest in pursuing this issue further.

5. New Business

a. *Task Force on 041*

Kelley McGrath has suggested that a change be made to the way languages are coded in the 041 \$b. Currently, subtitles that are also in the subfield \$a as a spoken language are not also coded in the subfield \$b. A change could be made to the definition of subfield \$b that would allow for the coding of all subtitle languages, which would make more sense for the coding of DVDs with multiple languages.

Jay Weitz suggested the preparation of a proposal for MARBI which would change the definition of 041 \$b. It was also stated that CAPC should go through the LC MARC office and have them propose the 041 definition change to MARBI instead of making the proposal directly to MARBI.

b. *New CAPC Website Draft*

<<http://www.olacinc.org/capc/newcapc.html>>

The new page was greeted positively. There was a suggestion that CAPC training materials have a link on the main OLAC page.

c. *Genre Headings*

This was a request for information from Greta de Groat, asking when the Library of Congress will implement genre headings. It is unclear when LC will begin to use genre headings, and when they do they are likely to start with cartographic headings and expand from there. There is no timeline in place for LC to begin this process.

6. Adjournment

Respectfully submitted,

Amy Weiss,
OLAC Secretary

**ONLINE AUDIOVISUAL CATALOGERS
EXECUTIVE BOARD MEETINGS
OLAC CONFERENCE
Montréal, Canada**

Minutes

Meeting I

Thursday, September 30, 2004

1. Call to Order, Introductions, Announcements

President Robert Freeborn called the meeting to order. Board members present: Robert Freeborn (President), Rebecca Lubas (Vice President/President Elect), Cathy Gerhart (Past President), Robert Bothmann (Treasurer), Amy Weiss (Secretary), Lisa Bodenheimer (CAPC Chair), and Jain Fletcher (*Newsletter* Editor). Guests: Marc Richard and Lisa O'Hara, OLAC Conference Co-Chairs.

There were no announcements.

2. Secretary's Report (A. Weiss)

The minutes from the Board meeting held on June 26, 2004 at ALA Annual in Orlando, Florida were approved.

3. **Treasurer's Report (R. Bothmann)**

Please see the full treasurer's report elsewhere in this issue.

Because of OLAC's tight budgetary situation, the Board requested that the printed September *Newsletter* show next year's rate increase for OLAC memberships in its membership renewal form on p. [3] of its cover. When the increase goes into effect in January 2005, it is hoped that the individual membership renewals, plus institutional memberships, will buoy the treasury.

4. **Newsletter Editor's Report (J. Fletcher)**

With the draft of the print version in hand, Jain reported that the September 2004 issue of the *Newsletter* is approximately 60 pages long. While Board discussion at the last ALA Annual had yielded the idea that the *Newsletter* could be run on thinner paper to save money, Jain reminded everyone that this can *only* be done if the printer can provide a few "sample" copies to prove that the ink will not be bleeding through to the other side. If this turns out to be a viable solution and the weight of the cover paper can also be decreased, Jain warned that these combined measures may still not substantially reduce printing costs. Jain estimated that the printing and mailing costs would probably total around \$2000. for this issue.

Some alternative ideas to reduce paper consumption were offered for future issues, including making summaries of some columns and reports for the print version, with the full columns and reports in the Web version. However, it was acknowledged that was not an optimal solution. After discussion, the Board decided that OLAC will continue to offer a print *Newsletter*, as long as it can afford to do so.

5. **CAPC Report (L. Bodenheimer)**

There was discussion on whether the Board would consider making CAPC appointments at Montréal or at ALA Midwinter. The decision of the Board was to do this at Midwinter.

6. **Old Business**

No old business.

7. New Business

No new business.

8. Closed Session

Discussion of the disposition of the OLAC archives.

No report from the Conference Scholarship Committee.

9. OLAC Conference Organizing Committee Report (M. Richard, L. O'Hara)

Conference registration consists of 120 attendees from the United States, 90 from Canada and 7 from other countries. There were too many Canadian attendees to allow OLAC to take advantage of tax incentives for foreign conferences. However, the possibility of retaining many new Canadian members more than compensates for this.

Marc would like to compile a "how to" manual for OLAC Conference planning. This document would not go in the Handbook, but should offer useful advice for the planners of future conferences.

**Meeting II
Sunday, October 3, 2003**

1. Closed Session, continued

Discussion of CAPC appointments and process.

2. Post-Conference Report (M. Richard)

The Conference was a success!

Respectfully submitted,

Amy Weiss,
OLAC Secretary

**ONLINE AUDIOVISUAL CATALOGERS
MEMBERSHIP MEETING
OLAC CONFERENCE
Montreal, Canada
October 2, 2004**

Minutes

1. Introductions, Announcements (R. Freeborn)

Members of the OLAC Executive Board were introduced to the membership.

The winner of the Conference Scholarship, Jaime Andersen, was introduced.

The first-time attendees were acknowledged.

There is a need for an Outreach Advocacy volunteer and another volunteer for a liaison to MOUG. Persons interested in these positions were urged to contact Board members.

The Board is looking for a site for the 2006 Conference. While some groups have already expressed interest, the Board seeks full proposals to consider at Midwinter.

2. Secretary's Report (A. Weiss)

None.

3. Treasurer's Report (R. Bothmann)

Opening balance: \$4,593.77

Closing balance: \$2,712.25

In 2005, OLAC rates will increase to \$20.00 for a personal membership. The printing of the *Newsletter* alone costs \$14-16 per person.

Please renew your OLAC membership early in the year!

4. *Newsletter Editor's Report (J. Fletcher)*

The September 2004 issue of the *OLAC Newsletter* is now on the Web. The print version is in final draft and will be sent to the printers after the Conference.

5. *Committee Reports*

a. *CAPC (L. Bodenheimer)*

Announcement of CAPC meeting later in the afternoon (4:15 p.m.).
Agenda: reports on source of title for Internet resources, non-human actors, best practices, resource maintenance, and additions to personal names.

b. *Conference Planning Committee (M. Richard)*

The Conference Planning Committee for Montréal reported to the Board in January and in June. 220 people registered for the Conference; 27 people were registered for the SCCTP Workshop on Integrating Resources. The regional breakdown of attendees was 120 from the United States, 90 from Canada, and 7 from other countries.

Corporate sponsors for the Conference were thanked, including OCLC Canada, CLA, McGill University, and Blackwell-Swets.

Over 50 people contributed to the Conference, and all were thanked.

6. *Old Business*

None

7. *New Business*

None

8. *Adjournment*

Respectfully submitted,

Amy Weiss,
OLAC Secretary

CONFERENCE REPORTS
Jan Mayo, East Carolina University
Column Editor

**** REPORTS FROM THE ****
2004 OLAC Conference
Montréal, Québec, Canada

PRECONFERENCE

SCCTP INTEGRATING RESOURCES CATALOGING WORKSHOP

Presented by

Carol Baker, University of Calgary
Trina Grover, Ryerson University, Toronto

As a pre-conference event, on September 29th and 30th, OLAC offered the Integrating Resources Cataloging Workshop, developed by the Serials Cataloging Cooperative Training Program (SCCTP). The Integrating Resources Cataloging Workshop was first created by Steven J. Miller (University of Wisconsin, Milwaukee). Additional material on loose-leaf publications by Rhonda K. Lawrence (UCLA Law Library) has since been included. The course is based on AACR2's revised Chapters 9 and 12. It covers those continuing resources not issued as serials: loose-leaves and updating electronic resources such as databases and Websites.

Although conceived as a one or one-and-a-half day course, the two-day format in Montréal could well have been extended. Participants' interest level remained high throughout, reflecting the inherently intriguing nature of the resources and evolving cataloging solutions, as well as the friendly supportive style of the presenters, Carol Baker and Trina Grover.

The course began with the "big picture" of the bibliographic universe as composed of "finite resources" and "continuing resources", the latter including two categories, "serials" and "integrating resources (IR)". Decision points for cataloging, such as distinguishing monographic resources from continuing resources, were discussed. Differences in the cataloging process for serials and integrating resources were emphasized, with the concept of "integrating entry" (the same record being used and updated for most changes) being an important theme of the course. Debate and questions about these concepts were lively and ongoing.

The workshop proceeded through the topics of original cataloging, updating for the current iteration, copy cataloging, and cataloging of updating loose-leaves. Considerable time was expended on the coding of leader and control fields. A process which is not intuitive is made even less so by LC's and OCLC's continuing inability to implement the Bibliographic Level "i" (integrating) code; the related cataloging ramifications of that were explained. In an unusual departure for a cataloging course, the topic of resource selection was covered, since, in some cases, catalogers may be responsible for selecting Internet resources or may need to decide on the level of granularity to be described in the catalog.

The participants, most of whom were also registered for the OLAC Conference, ranged from librarians with several years' experience cataloging Internet resources or loose-leaf publications to those who had not yet been asked to provide this type of access. While those with experience have developed strategies and policies for dealing with electronic integrating resources, it was apparent there are more questions than answers about current rules and record structures, about library systems' capabilities, and about the potential in cooperative cataloging to deal with these multiplying resources and iterations.

The workshop maintained a satisfying balance between practical and provocative. The two trainers successfully presented complex material and responded enthusiastically to difficult questions.

reported by Liz Icenhower
Memorial University of Newfoundland

PLENARY SESSIONS

EXPANDING ACCESS: FRBR AND THE CHALLENGES OF NON-PRINT

MATERIALS

Opening Keynote Address by Allyson Carlyle University of Washington

Allyson Carlyle welcomed attendees to the 2004 OLAC Conference with a keynote address on the topic of the Functional Requirements for Bibliographic Records (FRBR). In her address, Carlyle shared her perspective on both the opportunities and the challenges that FRBR poses for non-print cataloging.

Carlyle teaches cataloging at the Information School, University of Washington, and has published extensively in the field. Carlyle introduced her presentation by explaining that, although she teaches all kinds of cataloging, she does not work as a cataloger every day; she therefore invited the audience to add their expertise to her remarks.

The presentation began with a general and brief review of FRBR and its significance to the cataloging community. Carlyle described the current era of cataloging as both exciting and fascinating, with cataloging and catalogers at the forefront of information research and analysis. Issues which the cataloging community has always recognized as crucial are now even more broadly recognized and discussed, with a wide range of commercial and academic, as well as library, applications considered. FRBR is "one step toward our progressive understanding and interpretation of the bibliographic universe". Carlyle told the audience that she loves FRBR, even though it may not always seem so.

In many ways, the FRBR model presents exciting opportunities for cataloging. Carlyle shared four examples of opportunities for non-print cataloging suggested by FRBR:

1. the promotion of a shared understanding of non-print materials with the goal of improving cataloging practice;
2. the clean up of problem work displays for non-print materials, especially those which have been difficult to display and present (e.g., music);
3. the opportunity to focus on each part of the record as it relates to cataloging and display;
4. the exploration of the potential to make catalogs better for users.

Cataloging in general is made very visible within FRBR discussions; catalogers can work to ensure that non-print materials are made likewise visible and their cataloging an intrinsic part of both theoretical and practical discussions.

On the other hand, FRBR is not a magic solution; here is where anyone's love for FRBR may be mitigated. FRBR is a conceptual model. Regardless of theory, non-print cataloging will still have the same problems it has always had; the bibliographic universe will be the same despite clarified definitions. Moreover, although the conceptual FRBR model helps to delineate and make more comprehensible and consistent an outline of the bibliographic universe--through identification of its entities and their attributes and interrelationships--FRBR does not have rules for practice or implementation. A critical challenge is how to implement this shared understanding of the bibliographic universe into cataloging rules for operational decisions, as well as how to incorporate it into standards of daily practice, such as MARC.

FRBR defines three groups of entities: products of intellectual/artistic endeavor (Group 1); agents in the world--i.e., persons, corporate bodies (Group 2); subjects of works (Group 3). Carlyle focused her presentation on Group 1 entities, identifying the specific challenges for implementation related to these entities.

A primary challenge common to all Group 1 entities is the issue of boundaries, determining when to consider an item a new work, a new expression, or a new manifestation. When should a new record be created? One issue is whether the FRBR model agrees with or suggests the need for enhancement of existing AACR2 rules. Carlyle suggests that the challenge of boundaries might provide us with opportunity to think about things differently and thus to move cataloging practice forward. As one example, some situations which we currently interpret as new editions, and thus new records, might in the FRBR catalog be best treated as either new expressions or new manifestations.

A challenge specific to "works" (i.e., "distinct intellectual or artistic creations") concerns the issue of whether to catalog an item as a whole or a part. Collections in particular may be a challenge within the FRBR model, as their placement within the whole/part schema may be complex. The treatment of serials under FRBR is also under debate (*for examples, see the works of Ed Jones and Barbara Tillett, such as the ALA presentations posted at <<http://www.ala.org/ala/alcts/alctscnted/presentations/presentations.htm>>, and of Patrick Le Boeuf*).

"Expressions", the FRBR entity defining "an intellectual or artistic realization of a work in the form ... or any combination of such forms", also pose challenges. This entity is especially challenging because it is a new concept, not yet integrated into existing and traditional rules and practices; as such, it can be difficult to understand. In addition, elements used to identify expressions exist both in Part 1 (Description)

and Part 2 (Access) of AACR2, making identification, as well as the placement of expression information in the bibliographic record, quite complex. Moreover, current rules do not require some information that would be crucial to expressions, such as translator and illustrator names. So FRBR may require information to be more consistently located both in rules and records; however, if such change does not occur, even more confusion may result.

All of the Group 1 entities pose challenges for implementation. New rules will have to be developed. In determining new rules, traditional practice may also need to be re-examined. Carlyle gave as an example the treatment of works of mixed responsibility in AACR2. There is no general rule for their entry, but instead rules for shared responsibility are used. This is a lack that might be redressed under FRBR. Carlyle suggested that radical responses to the issues raised by FRBR might be explored. One such "radical response" is that cataloger judgment and the needs of users may be deemed the best arbiters for decision-making.

The ultimate challenge of FRBR, said Carlyle, is that it represents such a big change, and catalogers may or may not be ready for big changes. Those who are cautious about leaping into FRBR are not unwise, since it would not be wise to undo or lose the benefits of traditional practice in the move towards future practice models. There is, however, good news: implementation need not be done immediately nor all at once. Instead, FRBR may be selectively implemented, with only those items which would most benefit from FRBR's enhancements being initially selected. We need not attempt to transform all cataloging and cataloging records into FRBR immediately, but we can use selected items as test cases for the application and implementation of FRBR.

FRBR has been a hot issue over the last few years, and will likely continue to be so. Some in our profession are very excited about FRBR, while others express greater caution, wary, perhaps, of hype. Carlyle's balanced perspective suggests that implementation may provide a common ground wherein the excitement takes more pragmatic root and the caution may be rewarded by results. Carlyle concluded her address by noting that FRBR has brought cataloging to greater prominence and visibility in the world beyond the library. It is, in fact, the latest development in a continuum of cataloging theory and practice, representing a natural progression, no matter how radical it might seem. Perhaps most important is the unique opportunity FRBR provides for the cataloging community to reflect on what we do and why we do it.

reported by Nancy Babb
University at Buffalo Law Library



EXPANDING ACCESS, EXPANDING THE CHALLENGES

Closing Keynote Address by Guy Teasdale

Directeur des services de développement et de support, Bibliothèque de l'Université
Laval

Guy Teasdale spoke about uniting cataloging and metadata, since, too often, metadata is dealt with in "projects" rather than as part of the normal cataloging workflow. Moreover, the "digital backlog" must be reduced if users are to have access to the rapidly growing number of electronic-only documents. To do this, catalogers must be willing to move beyond MARC21 and use a number of metadata schemas.

The vision that Vannevar Bush expressed in "As We May Think" (published in the *Atlantic Monthly* in 1945) has not yet been fully realized; it will take the "semantic Web," as proposed by Tim Berners-Lee, for that to happen. Guy outlined some of the recent changes in the Internet, as well as some recently-developed metadata schemas, to suggest how the semantic Web might be attained.

The growth of the Internet is especially noticeable in the "deep Web": documents that are not easily accessible through popular search engines. These documents, however, tend to be very valuable to users. Metadata harvesting (for instance, as it is used in the Open WorldCat project by OCLC) is one way of expanding access to these Web pages.

The best-known metadata schema (other than MARC) to catalogers is Dublin Core; it has existed for a fairly long time, it has been adopted as ISO 15836, and has a great capacity for interoperability. Librarians often find it simplistic, but it has been well-received outside the library community.

Guy showed a chart (resembling a subway map) explaining the relationships and differences among metadata schemas, as well as the organizations involved and the types of files described by each schema.

A slide of Roy Tennant's *Library Journal* column, "MARC Must Die" was shown with Bob Dylan's song, "The Times They Are a-Changin'," playing in the background. However, Guy assured the audience that neither he nor Roy Tennant really believes that MARC has outlived its usefulness. Still, he did say that it is important to broaden our horizons and not rely simply on MARC and AACR2.

MARC was revolutionary when it was introduced in 1965, but it is important to remember that it was developed before the personal computer or the Internet, at a time when computer storage was very expensive. The library world needs metadata standards that are broader, more versatile, and more granular (greater granularity will allow for more re-use of data). XML looks especially promising as a kind of *lingua franca*. It is now used by most FRBR systems, and the Library of Congress is working with it in a number of areas.

Guy concluded with a timeline of metadata development, from Bush's article in 1945 to MODS (Metadata Object Description Schema) in 2002. Change is still rapid, but it is no longer occurring at an overwhelming rate. Library professionals will certainly be needed to create and manage metadata, so it is important that we learn new skills and become involved in the semantic Web.

reported by Julia Huskey
Mercer University



PowerPoint Presentation | Lecture (.doc)

WORKSHOPS

DESCRIPTIVE CATALOGING OF MUSIC SCORES

Presented by Rachel Gagnon
Library and Archives of Canada

Rachel Gagnon, music cataloger in the Monograph Cataloging Division, Acquisitions and Bibliographic Services, Library and Archives Canada, led this workshop. She joined the Music Team in 1995, and is currently Acting Leader for the team, which is responsible for cataloging books on music, scores, musical videos and musical sound recordings in all formats. Participants were assumed to have familiarity with AACR2R 2002 revision and the MARC 21 bibliographic format. An extremely detailed handout accompanied the presentation.

The focus of the workshop was published printed music. The first thing the cataloger must determine is if the item to be cataloged is actually published. If material is determined to be unpublished, the cataloger must follow the rules in AACR2 Chapter 4 (in addition to the rules in Chapters 1 and 5, and several in Chapter 2). When cataloging unpublished materials written on pre-lined staff paper, it is important not to consider the name of the paper printer to be a publisher!

Another consideration to be made when cataloging is to determine whether the item in hand is really printed music, or is better described as a monograph or some other format. This decision will affect the choice of AACR2 rules and MARC coding. Rachel cautioned not to agonize! However, she advised that a cataloger be consistent with treatment of materials once a decision has been made.

A third consideration when cataloging music is to determine if this item has been cataloged in the past. Before creating a new record, consult the definition of "Edition" in AACR2, Appendix D, LCRI 1.0 and OCLC documentation (as appropriate to the situation). Rachel outlined the various criteria used to determine whether or not a new record is required, and when it is acceptable to create an additional record for the same item.

The bulk of the presentation was devoted to a detailed explanation of the rules for the descriptive cataloging of printed music found in Chapter 5. The chief source of information and prescribed sources of information were discussed, followed by title (MARC 245), added titles (246, 740), edition (250), musical presentation statement (254), publication, distribution, etc. (260), physical description (300), notes, and standard numbers, e.g., ISBN, ISMN (020, 024).

A major complication in choice of main entry for printed music has to do with arrangements. Guidance covering main entry is comprised in Rules 21.18 to 21.22. Collections with and without collective titles are treated in 21.7. Rule 21.4C (and the associated *Music Cataloging Decisions* [MCD]) covers works erroneously or fictitiously attributed to a person. Guidance for arrangements and adaptations can be found in Rule 21.18, again with some associated MCDs. Other special situations (musical works with words, added accompaniments, liturgical music, and related works, such as cadenzas and librettos, are also covered in Chapter 21.

Uniform titles can be used for several different purposes. They can bring together all catalog entries for a work when various manifestations of the work have appeared under various titles. Uniform titles also provide the means for identifying a work when the title by which it is known differs from the title proper of the item being cataloged, and for differentiating between two or more works published under identical titles proper. Finally, uniform titles can be used to organize the file.

Uniform titles are formulated according to rules in AACR2, Chapter 25 (as well as associated MCDs). There are six steps to building a "normal" uniform title: choosing the initial title element, manipulating the initial title element, making additions to generic initial title elements to make it distinctive, adding further identifying elements

to resolve conflicts, adding designations representing parts of a whole, and adding terms that indicate the manifestation in hand.

In the Library of Congress classification scheme, schedule M is devoted to music. Subclasses include M (instrumental and vocal music), ML (literature on music) and MT (musical instruction and study). The "glossary and general guidelines" page found at the beginning of the printed schedule includes several important definitions, such as "collection", "continuo", and "set".

The final section of the handout includes many useful references for music cataloging tools and Websites.

reported by Mary Huisman
University of Minnesota

CATALOGING CARTOGRAPHIC MATERIALS ON CD-ROMS

Presented by Karen Jensen
McGill University

Karen Jensen, the Science Cataloging Librarian at McGill University, combined her cataloging, geographical, and teaching knowledge to bring OLAC this workshop. Karen has a BSc in Geography in addition to her MLIS and has taught Descriptive Cataloging for library technicians at Concordia University.

Using a practical approach, Karen combined rules from Chapters 3 and 9 of AACR2 to cover how to catalog maps, atlases, and cartographic data issued on CD-ROMs. Karen defined three main types of electronic cartographic data: scanned images of maps, electronic atlases, and geospatial data. She showed examples of each. Karen also distinguished vector geospatial data (representing geographic features as points, lines, and polygons) from raster data (image information).

Commercially published cartographic CD-ROMs frequently have plenty of bibliographic information on the disc label and accompanying guides. The attendees were cautioned, however, that much geospatial data is often distributed non-commercially without any special packaging. Sometimes the cataloger will need to hunt for information about the file by loading the disc and searching for a "readme" file. Often cartographic CD-ROMs contain a file with metadata that is very helpful in creating a MARC record.

Karen carefully reviewed the cartographic-specific and electronic-specific fields of the fixed fields (008) and variable fields.

Subject analysis and Library of Congress classification were also discussed. LC classifies all cartographic CD-ROMs as maps and does not use the atlas range of the G schedule, reserving that range for print atlases.

The last portion of the workshop was spent reviewing real examples of electronic cartographic cataloging. Karen helpfully highlighted the particular features of each record, including electronic atlases, scanned maps, and geospatial data.

The presenter highly recommended several resources for the cataloger to reference, such as *Cartographic Materials: A Manual of Interpretation for AACR2, 2002 Revision*, edited by Elizabeth Mangan and *Cataloging Electronic-Resources Cartographic Materials: The Basics*, by Mary Lynette Larsgaard.

reported by Rebecca L. Lubas
MIT Libraries



PowerPoint Presentation | Examples (.doc)

CATALOGING AND INDEXING OF STILL AND MOVING IMAGES

Presented by Katherine Kasirer
National Film Board of Canada

Katherine Kasirer gave an interesting presentation on how the National Film Board of Canada (NFB) provides access to films that depict Canada to Canadians. The film collections at the NFB include films, videos, Websites, DVDs, filmstrips, stock footage, and photographs.

The National Film Board has developed several databases to organize and provide access for its collection. These databases include the FORMAT database for films and SYNCHONE for the stock footage, photographs, and music sheets. The public can index the NFB collection by title, credits, description, controlled vocabulary, and related terms. Catalog records for all NFB titles can be found also in AMICUS.

Ms. Kasirer mentioned the most frequently used access points for the different types of materials. This can be helpful in designing a catalog for these materials. Subject is the most frequent method that clients use for films and the stock shot collection. But she mentioned that clients access stock shots and photographs by camera angle (close

up, zoom in/out), shooting conditions (foggy, underwater), time periods (seasons, night, war-time), and geographic locations.

reported by Kathleen Schweitzberger
University of Missouri—Kansas City

CATALOGING UNPUBLISHED ORAL HISTORY INTERVIEWS AND COLLECTIONS

Presented by Marsha Maguire
University of Washington

The rules for cataloging, oral histories are very similar to those for unpublished archival materials. Ms. Maguire's presentation centered on the rules for cataloging oral histories, the nature of the materials one might encounter, including a distinction between interviews, projects and collections, and the description of these materials.

Maguire provided a bibliography of useful sources, including Marion Matters's *Oral History Cataloging Manual*, published by the Society of American Archivists, containing a number of forms. Oral history cataloging uses AACR2 for physical description, but relies heavily on Hansen's *Archives, Personal Papers, and Manuscripts* (APPM) for the rest of the description.

An oral history interview may consist of an individual interview or a sequence of interviews with the same person(s) or may have similar intent. It involves a question/answer interactive format conducted by an interviewer, and is intended to be made accessible to the public. It is not a recorded, edited memoir. An oral history project is a series of oral history interviews documenting a topic, and generally has its own formal title, much like a corporate entry. An oral history collection is less formal, containing oral history materials not associated with an official project. It may or may not have a theme or focus. Generally, a cataloger would create a new record for each interview, as well as a parent record for a project or a collection. Maguire suggested doing a skeletal version of the parent record first, in order to have an OCLC record number that could be used in the 773 field of each interview record for linking purposes. The parent record can then be enhanced after the interview records are in place. However, the parent record should not include links to the individual interviews. These records can be as detailed as one's institution requires, and depend largely on the cataloger's judgment and institutional policy.

Maguire explained, in detail, the elements that are required in a record, going through

each MARC tag, including fixed fields, and made distinctions between conventions for published materials and for unpublished works. In particular, there can be multiple 300 fields to allow for multiple formats of the same interview, if, for example, there were a videorecording, a sound recording, and a transcript of the same text/interview. Also, there is no 260 field, not even including a year (\$c), since an oral history is an unpublished work, nor a GMD, unless the unit description consists solely of one format.

In addition to the bibliography, her handouts included practice exercises, templates, and an excerpt from the Processing Manual of the Minnesota Historical Society <<http://www.mnhs.org/library/processingmanual/library/20.html>>. She also encouraged any interested parties to look into the Library of Congress Veterans History Project, in which oral histories are currently being taken: <http://www.loc.gov/folklife/vets/>.

reported by Michelle Emanuel
University of Mississippi



PowerPoint Presentation

IMPROVING ACCESS TO AUDIO-VISUAL MATERIALS BY USING GENRE/FORM TERMS

Presented by Robert L. Maxwell
Brigham Young University

Robert L. Maxwell conducted this informative workshop by actively leading the participants in a group discussion of several important questions related to providing genre/form access. The catalog of Brigham Young University's Lee Library features extensive provision of a wide variety of genre and form headings, differentiates them from their subject heading "cousins," and includes authority control for these headings. The focus of the session was nevertheless on helping the attendees to think through the associated issues for themselves, to develop solutions appropriate to a variety of library settings.

It is fairly well established by now that genre/form headings represent "what something is, not what it is about". This simple concept can still be complicated by a number of factors, including the reality that many genre/form terms are identical with subject terms. People seek materials in a given form or genre for a variety of reasons, but it is possible that there are two primary motivations: either the desire for "something" in a given genre (e.g., a comedy movie for the weekend), or the need to limit a topical search by form (e.g., works on voter registration, limited to statistics).

Providing some personal background, Maxwell mentioned that he had first become interested in genre/form issues early in his experience as a cataloger. He was searching for a work on how to make pop-up books. Of the hundreds of hits under the pertinent subject heading, only three were actually "about" the form; the balance were instances of pop-up books themselves. This experience demonstrated that it is important to distinguish and clarify the different uses of identical headings.

Maxwell asked how things are accessed by form in current library catalogs. At present, this is accomplished by direct searching on data marked with MARC21 tags, or limiting search results by MARC21 tags or formats. The discussion mostly focused on the use of the bibliographic field 655, but other elements can be used, including subdivisions in 6XX subfield \$v, terms in the 300 field, and the GMD. The definition of field 655, "Index term-genre/form", attempts to combine many different aspects of both works and items (in the FRBR sense), including the now-obsolete 755 field (Added entry--Physical Characteristics). It is useful to remember that older catalog records might still have genre/form headings in the 650 field or possibly the 755 field; also that music and literature headings will especially be found in field 650. While retrospective conversion of these fields is a management issue to consider, continuing the older practice confuses different types of content, impairs indexing, and makes future conversion projects more difficult.

A variety of questions relating to indexing and access were raised. Among them: Will an institution want to separate subjects (topics) from genres/forms, and, if so, how will this be accomplished within its given system? Will patrons be provided with browse access--as well as keyword access--to genre/form headings, and how will they be instructed regarding the difference? Considering consistency, how much revision of cataloging will be done: will it be limited to incoming copy or will it be applied retrospectively as well? What will be done in original cataloging? Here, participants stated that specific user needs may be the stimulus for retrospective work; for example, consistent provision and coding of the heading, "Video recordings for the hearing impaired". Another participant observed that it may be necessary to add terms retrospectively for specific kinds of materials, where a concrete need has been identified.

Maxwell stressed the importance, for all aspects of genre/form provision, of making clear departmental policies and communicating them to other areas of the library operation, particularly public services. Such policies, in fact, may be created in collaboration with public services colleagues, especially when they proactively state an interest.

The existence of headings from multiple thesauri in a genre/form index presents

several important considerations. There are currently over fifty thesauri authorized for use in field 655, mostly created and maintained by different bodies that do not consult with each other. Many of these thesauri are limited to particular disciplines or types of material, such as rare books, motion pictures, or graphic materials. Different terms may be used for the same concept, or the same term may be used for differing concepts. This is not an issue, of course within the confines of a single controlled vocabulary, however, will arise when multiple thesauri are needed by the institution.

Not only will this synonymy/homonymy cause ambiguity, but another concern is that a particular heading may appear at different hierarchical levels in different thesauri. This has implications for the heading's meaning, since the semantic context will differ. Also, a set of items retrieved using a heading established at different hierarchical levels may be mixed in terms of significance, since the levels of granularity represented may also differ. Finally, different hierarchies also involve different networks of reference headings. These considerations were made clear in an exercise in which the heading "Diaries" was presented in three different hierarchies representing three distinct contexts: LCSH, the Art and Architecture Thesaurus (AAT), and *Genre Terms: A Thesaurus for Use in Rare Books and Special Collections Cataloging* (coded "rbgenr"). Participants discussed which hierarchy would be pertinent to their user groups, and why. There was also discussion of different approaches to reconciling multiple thesauri, the two primary techniques being either to establish a dominant thesaurus (e.g., LCSH) for genres and reconcile headings from other sources to it, or to use different thesauri for specific types of materials. One participant pointed out that "playing to your audience" is important. This means asking the question: what is the purpose for collecting a given type of item? The answer may influence the heading and/or the thesaurus chosen.

Authority control was the final major topic discussed. It is possible, of course, to provide genre/form access without authority control. However, authority control is preferable, since it provides consistency and helps direct the user's search through reference headings. The downside, of course, is that authority control involves time and money, particularly given the present-day reality that Library of Congress does not yet create X55-based authority records. Nevertheless, a number of libraries have established authority records for their genre/form headings, so there is a body of experience on which to draw.

How would a library begin the project of providing authority control for genre/form terms? One approach would be to prioritize groups of terms that will receive control first, so that the work proceeds via conceptual clusters. It is also possible to control headings as they appear in new records, as a form of prioritization after the project has begun. A related question is whether or not to authorize entire genre/form strings,

with subdivisions. The advantage of doing so is that unauthorized headings reports will be reduced. There are several ways to create authority records. They can be created "from scratch", which is probably the most time-intensive method, but sometimes the only alternative in the case of some thesauri. In addition, existing LCSH records can be copied and manipulated to serve as genre/form records. This method involves a short series of relatively simple steps in systems that allow it. It is also possible to contract with authority vendors to provide these records. (As an aside, MARC21 authority records for the genre headings published in *Guidelines for Subject Access to Individual Works of Fiction, Drama, Etc.* [GSAFD], are available at no charge at

<<http://www.ala.org/ALCTSTemplate.cfm?Section=alctssectionscont&template=/ContentManagement/ContentDisplay.cfm&ContentID=32959>>.)

One more complicated question involved the potentially incorrect use of field 650 for genre/form headings. How can this be controlled, since every such heading can, after all, be used for subject access? Robert described the technique used at BYU, in which byte 008/09 for the subject authority records in question is recoded g, "reference or subdivision." This causes these headings not to be validated when coded 650, which in combination with a note for the catalogers' guidance provides a prompt to double-check that the heading is indeed being correctly used. As a complement, a public note (authority field 680) is provided which informs library users doing subject searching that related genre searches are available.

Several more challenging questions and issues were raised by Maxwell and participants, clearly demonstrating that there is still a long way to go in genre/form applications before they become part of the mainstream in cataloging.

This stimulating discussion was complemented by a very useful handout, which included the basic elements of MARC21 genre/form authority records, sample authority records, exercises, and four closely-spaced pages of "Audio-visual form terms found in LCSH that could be used in 655 fields" for several material types.

reported by David Miller
Curry College



PowerPoint Presentation | Handout

**FUTURE OF THE GMD:
WHAT CAN BE DONE TO IMPROVE IT OR TO FIND ALTERNATE WAYS
TO FULFILL ITS FUNCTION?**

Presented by Chris Oliver
McGill University

Chris Oliver, Head of Library Technical Services at the McGill University Libraries and the current chair of the Canadian Committee on Cataloging, was a member of the Format Variation Working Group, an international committee appointed by the Joint Steering Committee for Revision of AACR (JSC). One of the tasks of this committee was linked to a larger JSC initiative to reexamine and possibly deconstruct the general material designation (GMD). She began her sessions by describing the history of GMDs from their genesis in AACR1 to their present function and problems with their use.

She examined the effects of the International Conference on the Principles and Future Development of AACR held in Toronto in 1997 and the *Functional Requirements for Bibliographic Records (FRBR)*, and stated that the revision of AACR2's rule 0.24 has impacted the GMD by eliminating its primacy as one of the important factors in descriptive cataloging. "If all relevant aspects are to be described, what does one do about the GMD?" Chris pointed out that some of the present gmds would be appropriate for *FRBR*'s work and expression level while others would be more suited to the manifestation level.

She then introduced the audience to the proposals for the structure and content of AACR3 and asked the following questions (her suggestions for discussion are enclosed in parentheses):

1. Is there another way to communicate the information to the user? (icons, such as found in OCLC's WorldCat; public display labels or terms generated through a table from the terms in the bibliographic record for content, expression, and/or manifestation)
2. If one retains the GMD, could it be placed elsewhere? (Area 3 for all types of resources; Area 0 preceding the bibliographic description)
3. Can we improve the list of terms used as GMDs? (single terms – same level of generality, mutually exclusive; compound terms, e.g., GMD (qualifier); compound term; GMD1 + GMD2)

The discussions that followed were very lively, especially in the first session. There was a strong consensus in both sessions that it is necessary to identify the format of an item early in the bibliographic record and that the method chosen must be an internationally recognized standard. Some participants liked the idea of an Area 0 because, when the GMD is buried in the descriptive cataloging, the longer the record, the less likely the format of an item was apparent to the catalogue user. However,

there was some concern about the additional labor cost in adding an Area 0 to the record. Icons elicited both very positive and very negative comments.

There was much discussion about GMD terminology. While some people preferred the broader terms in AACR2's present list 1 ("the British list"), many others wanted more specific user-friendly terms that would immediately tell an item's format. One participant warned that very specific terms could lead to a GMD, such as "DVD region 3" or other wordy terms that would have to be standardized. Such standardization has been a continuing problem with new formats. Other participants favoured the present list of gmds with qualifiers added if necessary. One person remarked that with the increasing number of records for electronic resources in library catalogs it was time catalogers started using the GMD "text."

Much of the discussion was only peripherally about AACR2 rules as it revolved around coding and OPAC displays. In both sessions it was suggested that JSC look at the Amazon.com site to see how Amazon deals with format.

In both sessions, also, a few participants recommended that JSC articulate the following before changing GMDs and explain clearly to the cataloging community why these changes will be an improvement and not an exchange of one set of problems for another.

1. What is the problem that JSC is trying to fix? Is it the concept of the GMD? The way it displays? The terminology?
After this question has been answered, JSC should state:
2. the function of a GMD or other method of indicating format
3. the degree of specificity mandated and why this specificity has been chosen

Chris Oliver invited the audience to send her any additional comments they might care to contribute. Her e-mail address is <chris.oliver@mcgill.ca>.

reported by Jean Weihs



PowerPoint Presentation

VIDEORECORDINGS CATALOGING WORKSHOP

Presented by Jay Weitz

OCLC

This workshop was a practical information session as well as a valuable educational experience for all those who attended. Jay Weitz focused on the issues in

videorecording cataloging which raise the most questions.

Weitz started off the two-hour session with a twenty-minute introduction and overview, and then opened the floor to questions from conference participants. He began with a brief background of the basic rules of video cataloging. The chief source of information for a videorecording is the title frames. A cataloger may use the container (i.e., the actual item containing the tape), the label on the container, or the packaging of a videocassette. Catalogers should be alert to differences in titles, which oftentimes result in multiple bibliographic records in OCLC for what is most likely the same videorecording.

Differences that justify a new record include: black and white vs. color vs. colorized, sound vs. silent, significantly different length (full length vs. abridged version vs. theatrical release vs. director's cut), different videorecording formats (VHS vs. BETA vs. DVD), dubbed vs. subtitles, different language versions, and changes in publication dates (but being mindful that the changes in dates are not merely for the packaging). In fact, Weitz suggested that catalogers ignore dates of packaging altogether whenever possible and emphasized the point that it is impossible to have a publication date for a DVD that is earlier than late 1996 or early 1997. For further information on differences that justify creating a new record, Weitz recommended the recently released document on the ALCTS Website entitled, "*Differences Between, Changes Within: Guidelines on When to Create a New Record*".

Weitz gave some history of various formats of videodiscs, including DVDs. Regardless of when the filming of the original motion picture took place, the publication date of the format cannot precede the introduction of or follow the demise of any particular format. Capacitance Electronic Discs, or CEDs, which are grooved, stylus-read and measure 12 inches in diameter, faded after 1984. Laser optical discs (grooveless, laser-read, 12 inches in diameter) flourished between 1978-1999. DVDs (grooveless, laser-read, 4 ¾ inches in diameter) were introduced to the North American market in March 1997. He also gave some guidelines to follow for cataloging DVDs. The GMD is [videorecording]. The 300 field should contain videodisc(s) for the SMD and the size 4 ¾ in. The System Details note (538) should be used to record "DVD" plus any additional information about special sound, colour, etc. (AACR2 7.7B10). The language note 546 is used to supply any information about language including closed captioning, subtitles, or dubbing. Recently the 04 position in the 007 field has been defined for DVDs with the code "v". Catalogers should be certain to code the rest of the 007 to accurately describe a DVD. When it comes to dates, Weitz explained that the cataloger should consider items with *substantial* new or *extra* material as Type of Date code "s" in the 008 field. This includes any of the following on a DVD: trailers, outtakes, documentary material, interviews, or different

versions or cuts of the motion picture. When catalogers encounter such a situation, they should consider the DVD to be a new edition and include a note about the date of original release.

Weitz spent the last portion of the workshop discussing streaming video. He defined streaming media as "an Internet data transfer technique that allows the user to see and hear audio and video files without lengthy download times. The host or source "streams" small packets of information over the Internet to the user." Not many catalogers have handled this format yet.

The form of item in the fixed field and in the 008 field is coded "s" for electronic. An 006 and an 007 field for videorecordings is required as is an 007 field for electronic resource. The GMD is "[electronic resource]". Typically, a 300 field is not used for remote resources. However, the 2004 amendments to AACR2R (which were implemented September 1, 2004) allow the cataloger to add a physical description as an optional rule.

The first note in a bibliographic record for streaming video should be a general note (500) indicating that it is streaming video, with (optionally) duration time supplied in parentheses. This is followed by a 538 for System Requirements and another 538 for Mode of Access. Finally, an 856 field for the URL is included. Some streaming videos do not have credits. If the title does not come from the streaming video itself, indicate in a note where this information was found (e.g., Title from home page, etc.)

One participant asked what information to put in the subfield \$c of the 245 field. Typically, it is appropriate to include producers, directors and writers in this subfield (e.g., those with "overall responsibility"). In instances of animated films, it would be appropriate to include chief animators and directors of animation. Any other names that the cataloger wanted to trace would be included in the 508 field. Weitz stressed that the cataloger should not agonize over making exceptions about what names to include in the statement of responsibility, especially when the name is important to the content of the work. For instance, it would be appropriate to include the name of a rock group in the statement of responsibility for a music video even though they are the performers, and not necessarily a producer, director or writer. In relation to other added entries, catalogers should follow LCRI 21.29D.

Another question was asked about how to treat a DVD that comes with DVD-ROM features. The answer: catalog the item as a DVD and if special features require a computer, to include a note (538) for special requirements. Further, the cataloger should delineate in a note (500 or 505, as appropriate), the contents in the DVD-ROM

feature. If the DVD-ROM aspect of the DVD were a *significant* portion of the work, it would be appropriate to include a 006 and a 007 field to bring out those features.

reported by Laura M. May
Concordia University Libraries



PowerPoint Presentation

NOTE: You must have "ALA BT courier font" to view some of the examples in the PowerPoint Presentation. If you don't have the ALA BT courier font, it is available with instructions at <http://www.indiana.edu/~libtserv/staff/auto/unicorn.html>

CATALOGING ELECTRONIC RESOURCES

Presented by Linda Woodcock
Vancouver Public Library

Linda Woodcock, Head of the Catalogue Division of the Vancouver Public Library, presented a detailed workshop on Cataloging Electronic Resources that focused on remote-access electronic monographs and online integrating resources. The handouts, which were very useful, consisted of sample catalog records, a list the coding for the fixed fields for textual integrating electronic resources, and a list of the significant rules from AACR2 for cataloging integrating electronic resources.

Woodcock began by noting the three basic questions to ask when cataloging any electronic resource:

1. What aspect of the resource is being cataloged (single page, single document, entire Website)?
2. What is the type of issuance (continuing [serial or integrating] or finite)?
3. What type of record should be created (text or computer file)?

LCRI 1.0 and AACR2 Chapters 9 & 12 provide guidance on answering these questions.

Woodcock used two catalog records, one for a remote-access electronic monograph and one for an electronic integrating resource, to explain the rules and rule interpretations from AACR2 chapters 9 & 12 for each field in each record. The highlights of the points what she brought out were:

- The chief source of description of a monographic electronic resource is the entire resource itself; the chief source for an integrating resource is its latest iteration.
- A remote-access electronic monograph often has a traditional title page supplying the elements of description, but integrating resources usually supply descriptive elements in a variety of ways (formal title or home page, graphic image, main menu, HTML header from browser title bar), so you need to choose the fullest form.
- AACR2 Rule 9.5B3 permits an extent statement (300 field) for remote-access electronic resources. The number of pages recorded is the number of pages shown by the document itself, not the number shown by the display/reader software.
- The required notes for remote access electronic monographs are: mode of access, system requirements, and source of title proper, which should include the date on which the resource was viewed.
- The 856 field can be used to record the URL of the resource itself, the URL of another version of the resource, or the URL of a work related to the resource (such as a table of contents). The field indicators distinguish between the types of URLs.
- The fixed fields required for a monographic electronic resource are: an 008 for books, an 006 for electronic characteristics, and an 007 for the physical features of the electronic resource. For remote access resources, only two positions are required in the 007, "c" for computer and "r" for remote.
- The mandatory variable fields in records for integrating electronic resources are: frequency, mode of access, system requirements, source of title proper (which should include the date on which the resource was viewed), and former titles (247), if applicable. The 516 field is not required.
- Supply the start/end dates of an integrating electronic resource only when the resource contains an explicit statement to that effect.
- Although the bibliographic level code "i" is authorized for integrating resources, it has not yet been implemented by OCLC. In the interim, the fixed fields for textual integrating electronic resources should be: record type "a" for textual and bibliographic level "m" for monographic in the 008 field, one 006 field for the resource's computer file characteristics, a second 006 field for its continuing characteristics, and an 007 field for its computer file/electronic characteristics.
- Records for remote-access electronic resources can be updated in any area of description. AACR2 Chapter 12 gives rules for how to deal with changes in each part of the record.

Last, but not least, Woodcock discussed three useful software tools: OCLC's Connexion, Sagebrush's MARCIt, and the University of Oregon's MARCEdit. Connexion and MARCIt can extract metadata from a Website to create a brief MARC record. Since your choice of Web page determines how full a MARC record is generated, it is important to choose this page wisely. It is likely the cataloger will need to add information to these generated records. MARCEdit, which is free, enables batch editing of large files, such as EBSCO e-journal records or e-book vendor records.

reported by Lisa Robinson
Michigan State University



PowerPoint Presentation (read-only) | Handout 1 | Handout 2

INTRODUCTION AU CATALOGAGE DES RESSOURCES INTÉGRATRICES

Présenté par Gaston Fournier
Université du Québec

Gaston Fournier, bibliothécaire responsable des services techniques à l'École de technologie supérieure à Montréal (Université du Québec). Monsieur Fournier a oeuvré précédemment à la bibliothèque de l'Université de Moncton, entre autres, en tant que Chef du service de catalogage.

Le but de l'atelier était de donner un aperçu de ce que sont les ressources intégratrices. L'expression « ressources intégratrices » est apparue officiellement avec la révision en 2003 des *Règles de catalogage anglo-américaines* (RCAA2, Chap. 12). Cependant, ce genre de document existe depuis longtemps.

Monsieur Fournier présenta d'abord quelques définitions de l'expression. En bref, les «ressources intégratrices" sont des ressources bibliographiques continues, qui sont modifiées et modifiables au moyen de mises à jour. Deux exemples de ressources intégratrices sont les publications à feuilles mobiles et les sites Web augmentés ou modifiés. Les ressources de ce genre changent donc fréquemment, ce qui présente un réel défi aux catalogueurs qui doivent reconnaître ces documents et penser à établir tous les liens nécessaires lors de la création du dossier bibliographique, en plus de veiller à modifier correctement les dossiers bibliographiques lors des mises à jour.

Le présentateur de l'atelier s'arrêta à plusieurs points spécifiques des dossiers bibliographiques créés pour les ressources intégratrices : les variantes du titre, les mentions de responsabilité, les zones d'édition et de publication, de la collation et de

la collection, des notes, etc.

Cet atelier fut très intéressant et nous a donné une bonne introduction à ce que sont les ressources intégratrices et les problèmes rencontrés par les catalogueurs qui en font le traitement.

INTRODUCTION TO INTEGRATING RESOURCES CATALOGING

Presented by Gaston Fournier

Gaston Fournier, is presently Technical Services Librarian at the École de technologie supérieur de Montréal (Université du Québec). Prior to this position he worked at the Université de Moncton as Head of the Cataloging Department and more recently as Director of Automated Systems at this same university library system.

The aim of this workshop was to introduce the special category of documents that are known as "integrating resources". This label might seem a novelty since it only appeared officially with the 2002 revision of AACR2. However, this type of document has been around for a long time.

Mr. Fournier provided some definitions of "integrating resources". In summary, these documents belong to the "ongoing" bibliographic resources type. Integrating resources are resources that are modified or changed by means of updates. Two examples of integrating resources are updating loose-leaves and updating Websites, both of which offer great challenges to catalogers. Right from the start these documents must be recognized so that, when creating the bibliographic record, all the necessary links may be identified. Moreover, modifications to the bibliographic record will need to be made whenever updates happen.

Gaston Fournier highlighted field-by-field instructions when cataloging integrating resources: title, variant titles, statements of responsibility, publishing statement, physical description, notes, etc.

This workshop was very enlightening. It provided participants with a good introduction to what integrating resources are and to the problems encountered by librarians who have to catalog them.

*reported in French and English by Jacinthe Ouimet
Université d'Ottawa*



PowerPoint Presentation

DESCRIPTIVE CATALOGING OF SOUND RECORDINGS

Presented by Daniel Paradis
Université de Montréal

Daniel Paradis of the Université de Montréal presented Descriptive Cataloging of Sound Recordings, and the session was both interesting and informative. It was one of several French-language offerings at the conference. The workshop dealt exclusively with descriptive cataloging as it pertains to sound recordings and was based on cataloging norms as presented in AACR2, Library of Congress Rule Interpretations (LCRIs), Music Cataloging Decisions (MCDs), and MARC 21. The format for the presentation followed the areas as they are laid out in AACR2, with pertinent LCRIs and MCDs being mentioned in context. MARC examples were given throughout.

In the first part of the workshop, Paradis focused on the Title and Statement of Responsibility Area. He began with a discussion of the chief source of information for the work, giving examples of situations where identification of the chief source is guided by the rules. After that, he discussed the difference between generic and distinctive titles. The identification of the title proper determines other title information and subtitles, as well as placement of the GMD, and is a very complex process. A proportionally large amount of time was devoted to this subject.

Next, Paradis talked about the Publication, Distribution, etc. Area. If there is a publisher but no place of publication, it is possible to consult the Internet; the country of publication can be given in brackets with a question mark if unsure. With certain international labels, it will be necessary to enter "[S.I.]".

Paradis also gave guidelines for transcribing the myriad publication dates, copyright dates, and phonogram dates that can appear on sound recordings. The copyright date cannot be transcribed in place of the publication date, but it can be used to infer the publication date of a recording; in that case, the publication date would be bracketed. Paradis provided examples of situations where multiple phonogram dates appear and gave sample transcriptions for different cases. In the slides that he presented, Paradis did not use the phonogram date to infer the publication date.

A discussion of the Physical Description Area followed. The 2004 updates of AACR2 include some changes in the Physical Description Area by allowing for the use of modern terminology in the description. Problems are foreseen with describing traditional vinyl record albums. Paradis said that LC has opted not to apply this new option and that LC will also not apply the option of omitting the word "sound," even

though it is possible to do so because of the GMD. Next, attendees were encouraged to look over the slides about the Notes Area on their own.

Under the rubric "Special cases", Paradis included a brief discussion of Super Audio CDs, which require the entry, "\$b digital, SACD" in the Physical Description Area and a System Requirements Note (538). Enhanced CDs (those with CD-ROM elements included) also require a 538 note. A Summary Note (520) is used to describe the content of the multimedia element of the enhanced CD, and since the multimedia part is considered accompanying material, 006 and 007 fields are necessary. Also, Paradis mentioned that MP3s are cataloged as sound recordings and not as electronic resources. The rationale is that a computer is necessary for accessing electronic resources, but MP3s can be played on a variety of devices and are therefore not electronic resources.

Access issues rounded out the formal content of the workshop, including a discussion of main and added entries along with uniform titles. Rules for entries of composers, performers, and groups such as orchestras were discussed. When to create variant titles access and name-title access was also discussed. Examples of uniform titles were given.

Despite the vastness of the subject, the content was comprehensive and complete with relevant examples in a supplementary handout. Examples on the handout were tied to the presentation throughout the course of the workshop. Paradis took questions throughout his presentation, enabling participants to clarify situations that have arisen at their institutions. Although the questions limited somewhat the amount of content that was covered during the workshop, the accompanying documentation compensated.

reported in English by Heather Lea Moulaison
Southwest Missouri State University

LE CATALOGAGE DESCRIPTIF DES ENREGISTREMENTS SONORES MUSICAUX

Présenté par Daniel Paradis
Université de Montréal

Daniel Paradis de l'Université de Montréal a présenté l'atelier « Le catalogue descriptif des enregistrements sonores musicaux », une session à la fois intéressante et informative. Cette conférence OLAC a pu offrir quelques ateliers en français. Notre atelier traitait exclusivement du catalogue descriptif des enregistrements sonores musicaux et portait sur les normes de catalogue telles que prescrites par les RCAA2,

les *Library of Congress Rule Interpretations* et les *Music Cataloging Decisions* de la LC et MARC 21. Le déroulement de l'atelier s'est fait en suivant les différentes zones telles qu'on les retrouve dans les RCAA2, avec utilisation des LCRI et MCD pour étoffer certains points. Des exemples en format MARC furent proposés tout au long de la présentation.

Dans la première partie de l'atelier, Paradis s'est intéressé à la 'Zone du titre et de la mention de responsabilité'. Ceci débuta par une discussion sur la source principale d'information d'un document, avec des exemples sur l'identification de la source d'information principale conformément aux règles de catalogage. Ensuite, le conférencier discuta des différences entre les titres génériques et les titres distinctifs. L'identification du titre propre est un processus très complexe ; une fois le titre propre déterminé, les compléments au titre, ainsi que les sous-titres, ont été identifiés, de même que la position de l'IGGD (Identification générale du genre de document—GMD). Une importante partie de l'atelier s'est déroulée sur cet aspect.

Ensuite, Daniel Paradis s'arrêta à la 'Zone de la publication, distribution, etc.' Quand l'éditeur ou autre responsable de la publication nous est donné sans lieu de publication, il est possible de découvrir ce lieu en consultant l'Internet; en l'absence de lieu, le pays de publication peut être donné entre crochets avec point d'interrogation; si nécessaire, pour certaines étiquettes internationales on pourra recourir au [S.l.].

Paradis discuta aussi des principes généraux intervenant dans la transcription des innombrables dates de publication, de copyright, de phonogramme, qui apparaissent sur les enregistrements sonores. On ne doit pas utiliser une date de copyright comme date de publication, mais cette date peut servir à déterminer une date approximative de publication, qu'on donne alors entre parenthèses carrées. Le conférencier partagea plusieurs exemples où de multiples dates de phonogrammes étaient données, ainsi que la manière de transcrire ses dates. Dans sa présentation, Daniel Paradis n'a pas utilisé de date de phonogramme pour déterminer une date approximative de publication.

Vint ensuite une discussion sur la 'Zone de la collation'. Les modifications de 2004 aux RCAA2 apportent certains changements à cette zone. Entre autres, elles permettent l'utilisation d'une terminologie usuelle dans la description. Ceci pourrait causer davantage de problèmes dans les cas de catalogage de disques 33 tours. Paradis remarque que la Library of Congress n'utilisera pas cette option. De même, LC n'utilisera pas l'option d'omettre le mot « son. », bien qu'il soit possible de l'omettre vu l'existence de l'IGGD (GMD). Les participants à l'atelier furent ensuite invités à lire par eux-mêmes l'imprimé des diapositives portant sur la 'Zone des notes'.

Sous l'en-tête « Cas spéciaux », Paradis discuta brièvement des documents SACD (Super Audio CD) pour lesquels la 'Zone de collation' doit indiquer « |b numérique, SACD » et afficher aussi un 538 pour annoncer les éléments matériels requis pour utiliser le document. En ce qui concerne les disques compacts de type « EnhancedCD » ou « CD-Extra », un 538 s'avère aussi nécessaire. Une note pour le résumé sera faite en 520 pour décrire la partie multimédia du disque compact « enhanced ». Les zones de codage 006 et 007 sont aussi requises. Paradis mentionna que les documents MP 3 doivent être catalogués en tant qu'enregistrements sonores et non en tant que ressources électroniques. La logique derrière cela est que le document MP 3 peut être écouté à partir d'une variété d'appareils et non seulement depuis un ordinateur.

Pour conclure l'atelier, la discussion porta sur les points d'accès. Beaucoup de discussion sur l'entrée principale, les entrées secondaires ainsi que sur les titres uniformes. Les règles portant sur les points d'accès aux noms de compositeurs, interprètes et collectivités (telles les orchestres) furent aussi discutées. Quand établir des vedettes secondaires additionnelles aux variantes de titres? et des exemples de titres uniformes, furent aussi des sujets abordés.

Quoique le sujet de l'atelier soit vaste, la présentation a été exhaustive, étayée par des exemples pertinents que le conférencier nous remis sur papier. Ces exemples étaient ressortis tout au long de la présentation. Daniel Paradis répondit aux questions des participants au fur et à mesure qu'elles se présentaient et apporta des éclaircissements aux cas complexes rencontrés dans nos divers milieux de travail. Quoique toutes ces questions aient obligatoirement réduit le temps de présentation de l'atelier, les imprimés distribués aux participants par le conférencier ont été en mesure de compenser.

French translation by Jacinthe Ouimet



Presentation (.pdf) | Examples (.pdf)

NEWS FROM OCLC
Compiled by Jay Weitz
For the 2004 OLAC Conference

End-of-Life Dates for OCLC Cataloging Systems

As of May 1, 2005, all users of Passport for Cataloging must migrate to either the Connexion browser or the Connexion client. As of July 1, 2005, all users of CatME, CJK and Arabic must migrate to the Connexion client. In June 2005, OCLC will retire Passport for Union List, and Connexion will support local holdings (LDR) maintenance. OCLC will release more details over the next few months. Migration options are:

OCLC Connexion browser

- The browser option has easy Internet access, simple searching, easy cataloging of Internet resources, no extra software to install and maintain, and automated heading verifications.
- OCLC Connexion browser contains all Passport for cataloging functionality except for macros and truncated lists. Macros will not be supported in the browser (they are available in the Connexion client).
- Truncated lists will be added to the Connexion browser, along with WorldCat true keyword searching and support for additional browse indexes. OCLC will issue more details over the next few months.
- To begin using the Connexion browser, log on at <<http://connexion.oclc.org>> using existing cataloging authorization and password.
- Connexion browser documentation, including a tutorial, can be found at <<http://www.oclc.org/support/documentation/connexion/browser/default.htm>>.

OCLC Connexion client

- The client option is a powerful, flexible Windows-based interface with productivity-boosting enhancements, including macros, additional keyboard customization--all navigation and cataloging actions can be performed using assignable key combinations--and integrated label printing.
- Version 1.20, scheduled for 4th quarter 2004, will contain most CatME functionality. This version will add NACO support, authority file searching enhancements, and local files including batch processing.
- Version 1.30, scheduled for 1st quarter 2005, will add the remainder of CatME functionality, WorldCat true keyword searching, truncated lists, and CJK support.
- Version 1.40, scheduled for 2nd quarter 2005, will add support for Arabic cataloging.

- To begin using the Connexion client, download it at <http://psw.oclc.org/software.htm>.
- Connexion client documentation, including a tutorial, can be found at <http://www.oclc.org/support/documentation/connexion/client/default.htm>. To learn more about migrating to Connexion, visit the Connexion migration Website at <http://www.oclc.org/connexion/migrating/default.htm>.

Connexion Client Version 1.20 Coming 4th Quarter 2004

Connexion client version 1.20 will be released during 4th quarter 2004 and will include the following enhancements: Authority File searching enhancements, NACO functionality, review records, offline cataloging, local save files, local constant data, batch processing, text strings, actions on multiple records from a list, and various miscellaneous enhancements. During 2005 and beyond, Connexion client 1.30 and later versions will include: WorldCat searching enhancements including "true" keyword searching and several new browse indexes, local accessions list, spell check, offline validation, drop down lists of valid values for fixed field elements, terminal sessions, Spanish interface, and Arabic and CJK script cataloging.

Implementation of AACR2, 2004 Update

Library of Congress catalogers began to apply new and changed rules from the 2004 Update to AACR2 on September 1, 2004. The 2004 AACR2 Update and its related *Library of Congress Rule Interpretations* became available to subscribers of LC's Cataloger's Desktop on that date. Printed copies of the LCRI's have been distributed by the Cataloging Distribution Service. A list of the changes in the 2004 AACR2 Update has been posted on LC's Cataloging Policy and Support Office Website <http://lcweb.loc.gov/catdir/cpso/2004upd.html>. OCLC recommended that member libraries also begin applying these new and changed rules on that date. To purchase copies of the update from ALA Publishing, please visit the ALA Website at <http://www.alastore.ala.org/>.

Registry of Digital Masters Record Creation Guidelines Released

The first release of the "Registry of Digital Masters Record Creation Guidelines" is available at <http://www.diglib.org/collections/reg/reg.htm>. The Registry of Digital Masters is intended to assist with access to digital materials, as well as to provide a tool to help librarians reduce duplication of digitization and preservation efforts. The Registry is available through OCLC WorldCat and is based on the DLF Digital Registry documents and MARC 21. Created by a DLF/OCLC working group, the Guidelines can be used to create metadata for born digital and digitized monographs

and serials, including materials that an organization will digitize in the near future. To be listed in the Registry, materials must be digitized according to standards and best practices with preservation in mind.

OCLC MEMBERS COUNCIL REPORT

Kevin A. Furniss

Greetings from OCLC Members Council. The October 2004 meeting was called "Pattern Recognition: Moving Libraries Beyond Their Comfort Zones". The following report includes topics discussed at the various meetings that should be of interest to OLAC members.

Connexion. Jim Simms provided a brief summary of the latest Connexion update. A performance problem was identified and fixed in August, which resulted in average system response time being cut in half. End of life dates were announced in late August, and migration is proceeding as expected. Significant browser searching enhancements will be added in November. Client 1.20, providing local files, batch processing, and NACO, is in field test, with a planned November release. Client 1.30, planned for March 2005, will add searching enhancements and CJK. Client 1.40, 2nd quarter 2005, will add support for Arabic and some additional functionality.

OCLC's Role in E-Content. Committee members provided brief summaries of their libraries' use of e-content, including: Netlibrary e-books; e-journals, either from aggregators or through direct contracts with publishers, and often through consortia or statewide deals (some mentioned switching many journals to electronic only); original content, such as maps, dissertations, graphic images and digitized art slides, streamed video collections, federal documents, oral history collections, and learning objects. Many add cataloging to OCLC for these either at the item or collection level. Discussion centered around the question of the relationship of collection level and item level records for digital collections. Should WorldCat become the "container" for all of it? Or should item level metadata reside in separate catalogs? The advantage of being in WorldCat is that all the various metadata types would be brought together for "one stop shopping". Standards will be crucial to dealing with this issue. It was agreed that this topic needs further discussion in future meetings.

Batchloading Update. Glenn Patton gave an overview of a document provided in advance of the meeting. FY2003/2004 was a record-breaking batchload year, with over 38 million bibliographic records processed. Processing for group catalogs contributed to this increase, as well as a renewed focus to add original records. Related to batchloading for digital collections, OCLC continues to add records harvested from CONTENTdm sites, but mapping is a laborious and time-consuming process. OCLC is working with DiMeMa to harvest qualified Dublin Core rather than simplified DC. OCLC also continues to improve communications about projects, including expanding delivery of reports via e-mail. Batchload redesign is scheduled for installation on October 31. This will not be a "hot cutover"; instead, it will be a gradual move of projects, in order to verify set-ups. OCLC is very pleased with the new matching algorithm, which provides improvements for scores, sound recordings, AV, and serials, and will also handle computer files and archival materials, which were not previously supported. Regarding local data records, Glenn indicated that OCLC continues to have a backlog, as these projects require a great deal of individual effort. However, this situation should improve when OCLC moves to MARC Format for Holdings Data (MFHD) as part of the Union List re-implementation. A committee member asked if converting DC to MARC would be required in the long-term. Glenn responded that Charly Bauer, new to OCLC, is working on being able to handle various non-MARC content records in WorldCat. Another inquired if CONTENTdm records are at the object or collection level. Glenn said these are at the object level, but that sometimes libraries create collection level records. Finally, another asked if OCLC is soliciting collections outside of CONTENTdm. Glenn's response was that this was not yet happening, but that this issue also falls within Charly's new responsibilities.

Potential Impact of FRBR on Cataloging. Diane Vazine-Goetz shared a set of observations made while building FictionFinder. The OCLC Office of Research used OCLC FRBR Work-Set Algorithm to create groupings mainly at the work level using author/title keys. This resulted in a 2.6 million bibliographic record subset of WorldCat which brought together expressions and manifestations for works of fiction. Some of the observations concerning cataloging are:

- Variations in title information and cataloging practice can lead to incomplete groupings.
- Using the authority record to collect title variations elicited these observations or questions:
 - Not all title variations are included in the authority record, which results in omissions
 - Are the titles variations in the authority record really the same work?
 - Concurrent works not always brought together in the authority record.

- Lack of authority control on an author's name can lead to records not being appropriately grouped.
- Some of this could be cleaned up algorithmically or with computer support.
- Does authority work need to change to accommodate these types of things?

Recommended Agenda Items for Next Meeting:

1. Integration of digital content in WorldCat.
2. Possible Machine Services Opportunities with Cataloging.

NEWS & ANNOUNCEMENTS
Barbara Vaughan, Column Editor

OLAC MEETINGS FOR ALA MIDWINTER 2005

OLAC President, Robert Freeborn, learned of the OLAC room assignments before this issue went to press. Here they are, along with dates and times.

- Cataloging Policy Committee (CAPC)
Friday, January 14, 7:30-9:30 p.m.
Sheraton Boston Hotel - Independence East Room
- Executive Board Meeting
Saturday, January 15, 3:00-6:00 p.m.
Hynes Convention Center - Room 102
- Membership Meeting
Saturday, January 15, 8:00-10:00 p.m.
Hilton Back Bay - Westminster Room

When the ALA event planner becomes available in mid-December, the "Meetings of Interest to AV Catalogers" will be assembled, then posted to the OLAC List and the OLAC Website.

Jain Fletcher
OLAC Editor-in-Chief

UCLA FATA'S CATALOGING PROCEDURE MANUAL

The *Cataloging Procedure Manual* (CPM) of the UCLA Film and Television Archive (FATA) is now available on FATA's Website at:
<<http://www.cinema.ucla.edu/CPM%20Voyager/CPMV00TofC.html>>

FATA uses a combination of *Anglo-American Cataloguing Rules*, 2nd ed., rev. (AACR2R) and *Archival Moving Image Materials: a Cataloging Manual* (AMIM2) rules, *Library of Congress Subject Headings* (LCSH) and *Moving Image Materials: Genre Terms* (MIM) genre and form terms in MARC21 format records on Voyager. This procedure manual indicates which rules FATA follows in any given situation and contains many examples. In addition, the CPM contains local rules for uniform titles, supplied titles, local subject headings and genre/form terms, and terms for use in the physical description of archival moving image materials, with an extensive glossary of the latter, including suggested MARC21 coding. The glossary in particular might be useful to institutions that deal on an occasional basis with film or video.

[adapted from a message originally posted by:]

Martha M. Yee
UCLA Film and Television Archive
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Los Angeles, CA 90038-2635

UPCOMING CONFERENCES

ViDe 2005: DIGITAL VIDEO CONFERENCE

Please mark your calendars for ViDe 2005, the 7th Annual SURA/ViDe Digital Video Conference <<http://www.vide.net/conferences/spr2005/>>.

Over 200 educators, librarians, archivists, technologists and policymakers will gather in Atlanta, Georgia, March 28-31, 2005 to discuss a broad range of issues relating to the development and deployment of video-over-IP in higher education. The SURA/ViDe Conference is one of the largest, most comprehensive and most lively annual events in the field. Presentations will cover the development and deployment

of digital collections and their use in settings as diverse as public broadcasting, distance education, K-12 classrooms and telemedicine. Also included will be presentations on emerging and evolving technologies, such as SIP, MPEG4, Multicast and HDTV.

As part of the conference, there will be two all-day workshops on March 31: one will focus on the delivery of high-quality, bandwidth-intensive video-over-IP; the second focuses on the development of metadata for digital video collections. There will also be a training session, led by Internet2, for I2 Commons Site Coordinators. There is a separate registration fee for all workshops and training, and space is limited.

The metadata workshop will include a review of basic metadata concepts; an overview of digital rights management; an introduction to METS (Metadata Encoding and Transmission Standard); and a comparison of the new multimedia metadata standard MPEG-7, PB-Core (a public broadcasting community enhancement of Dublin Core), and the native data element set of the Moving Image Collections Project, a joint project of the Association of Moving Image Archivists and the Library of Congress.

It is not too late to get involved! Anyone who would like to propose a presentation, or any vendor interested in exhibition space, should still have a chance to do so. Please visit the Conference Website for more information.

About ViDe: <<http://www.vide.net/>> -- About SURA: <<http://www.sura.org/>>.

[adapted from a message originally posted by:]

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RILM: "MUSIC'S INTELLECTUAL HISTORY"

The Website for RILM's upcoming conference has been established. The conference, "Music's Intellectual History: Founders, Followers, & Fads", will be held at the CUNY Graduate Center in New York City, on March 16-19, 2005.

To see the preliminary program (for which about 85 papers have been scheduled), please visit <<http://www.rilm.org/RILMconference.html>>.

For general conference information, please see <<http://www.rilm.org/RILMconferenceinfo.html>>. Prospective attendees can use the Website to register (please note that rates increase after January 15, 2005), to view hotel information, to find information for presenters, and more. Please note that St. Patrick's Day, which is a major tourist event in New York City, falls during this conference; hotel rooms are going fast, so book accommodations as soon as possible!

For exhibiting, advertising, and sponsorship opportunities and information, please see <<http://www.rilm.org/RILMconferenceexhibit.html>>.

For any other questions, please contact: <bmackenzie@gc.cuny.edu>.

We look forward to seeing you at the conference!

[adapted from a message originally posted by:]

Barbara Dobbs Mackenzie

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OLAC CATALOGER'S JUDGMENT

Jay Weitz

Identifying DVDs in a Record

Question I am relatively new to cataloging and am cataloging some DVDs. Can

"DVD" be added to the subfield \$h within the videorecording brackets? If not, how, aside from the 300 field, is it possible to distinguish videos from DVDs?

Answer If you are cataloging according to AACR2, the GMD in field 245 subfield \$h should be the unqualified designation "[videorecording]" according to Rule and LCRI 1.1C. The identification of the video format (DVD, VHS, Beta, etc.) goes in field 538, according to Rule 7.7B10(f). You may, however, choose to place this note first, in accordance with Rules 1.7B and 7.7B. In addition, be aware that, as of the September 1 implementation of the 2004 Update to AACR2, you also have the following option under 7.5B1:

Optionally, use a term in common usage to record the specific format of the physical carrier.

[Example:] 1 DVD-video

Even if you choose to follow this option, identification of the videorecording format in field 538 is still necessary.

History of the GMD for Electronic Resources

Question Is there a resource that gives a history of the GMD for interactive multimedia, computer files, and electronic resources? As I understand it, "electronic resource" has replaced "computer file" and "interactive multimedia". Is this correct? I ran across a record that was brought into our library's system in 2000. The record had the GMD "interactive multimedia". When I looked the item up in OCLC, the GMD had been revised to "electronic resource".

Answer The history of the General Material Designation for what are now called "electronic resources" is a checkered one. Here is a rough history, at least from the perspective of the *Anglo-American Cataloguing Rules*, 2nd edition. The original 1978 AACR2 included the catchy GMD "machine-readable data file", which was still the GMD when the MARC bibliographic format for computer software was first implemented in 1984. The draft revision of AACR2 Chapter 9, published in 1987, changed the GMD to "computer file". In 1994, "interactive multimedia" was added as an alternative GMD for use when applying ALA's *Guidelines for Bibliographic Description of Interactive Multimedia*. Finally, with the AACR2 Amendments 2001 package, the GMD was changed once again, to "electronic resource". At the same time (on December 1, 2001), the use of both "computer file" and "interactive multimedia" was discontinued. Through each of those changes, OCLC converted to the new GMD as many of the old GMDs as could be found. Most recently during late 2001 and early 2002, all instances of "machine-readable data file", "interactive

multimedia", and "computer file" were converted to "electronic resource". If anyone finds any in WorldCat that were missed (usually because of typographical errors), please let OCLC know and they will be fixed.

Field 041 for Videorecordings

Question I have three questions about the use of 041 field for videorecordings.

1. In video records should the 041 field include subfield \$h to indicate the original language if dialogue is available in an alternate language? For example: if the film was originally produced with dialogue in English and a DVD had an option for dialogue in French, should a subfield \$h be included for English?

041 1 \$a eng \$a fre \$h eng

2. If subfield \$h is included, should it follow subfield \$a and precede subfield \$b?

041 1 \$a eng \$a fre \$h eng \$b eng

3. Should subfield \$b include *all* languages that have subtitles available in a videorecording, or should subfield \$b only include those languages that do not appear in subfield \$a? For example: if a DVD is in English only, with no alternate language for dialogue, and subtitles are available in English and French, which of the following examples is correct?

041 1 \$a eng \$b eng \$b fre

or

041 1 \$a eng \$b fre

Answer Coding field 041 has never been easy for visual materials, but two circumstances in particular have made that coding even more complicated and confusing in recent years. One dates from late 1996 and early 1997, in the development and proliferation of the DVD video format with its vast capacity for multiple language soundtracks, subtitling, and captioning options. The other was the change in 041 coding practice implemented in December 2002 that mandated separate subfielding for each language code rather than multiple language codes in a single subfield. (Those of us who strenuously argued against this change because of its severe impact on the cataloging of visual materials and sound recordings, especially, lost that debate.) So, with that background, here are my recommendations.

1. When a translation is involved, a subfield \$h for the original language should follow the subfield(s) that represent the language(s) of translation.

2. The subfield \$h containing the original language should follow directly after the subfield (or the group of similarly-coded subfields) representing the language(s) of translation.
3. The general definition of subfield \$b in MARC21 reads, "Subfield \$b contains the codes for languages of summaries *when the language of the summary is other than that of the text*". Specifically for audiovisual materials it says that "subfield \$b contains the language code (s) of overprinted titles (subtitles) *when they differ from the language of the sound track*". (Emphasis mine, in both cases.) The clear intention of MARC21 is to code only those languages not already found in subfield \$a, which makes your second example correct.

Follow-up Question What about videorecordings with closed-captioning? Does 041 contain coding for closed-captioning text? As an example: for a DVD of a movie originally produced in English, there are English and Spanish versions, subtitles in French, and closed-captioning only in English. If coding for the closed-captioning is supposed to go in the 041, what subfield would it go into?

Follow-up Answer Closed-captioning can be considered to be similar to subtitling in the context of 041 coding. Languages of both captioning and subtitling would go in subfield \$b, but only when the language in question does not already appear in subfield \$a. In your example, English would already be coded in subfield \$a, so it would not be repeated in subfield \$b. That would likely be the case in most instances of closed-captioning, which generally reflect the language actually spoken in a video.

Another Follow-up Question The MARC21 guidance for audiovisual materials says that "subfield \$b contains the language code(s) of overprinted titles (subtitles) when they differ from the language of the sound track". The clear intention of that guidance is to code only those languages not already found in subfield \$a. Why is that? Would it not be more useful to have a complete listing of all the language tracks and all the subtitled languages in the 041 field?

Another Follow-up Answer I completely agree that it would make more sense (and, in theory, could assist in specialized retrieval in a system sophisticated enough to sort everything out) to code everything in its proper place. The downside, of course, is that 041 coding would be that much *more* complicated. My guess about why that particular coding anomaly exists is two-fold. First, there is the traditional book orientation of MARC. For books, subfield \$b is used for summaries, which are not all that different from any other text in the same book; not adding a code for a summary in the same language as the rest of the text seems to be a rational avoidance of redundancy. Compare that to the fundamental differences between a language spoken

in a video and a language appearing *on* a video image (either as subtitles or as captioning). Even if it happens to be the same language, the difference is that of hearing the spoken word versus reading the written word. In retrospect, it probably would have made more sense to have subtitling and captioning in a different subfield altogether and/or to have coded all relevant languages. Second, and in the defense of those who maintain the MARC formats, the realities of MARC coding are always trying desperately to catch up to the advances of technology. In a world of motion picture film, and even of videotape, the language possibilities for subtitling and captioning were relatively limited. DVDs exploded those limits and MARC does not yet reflect that change, if it ever will.

Questionable Date 1 and the DtSt Hierarchy

Question For some DVDs published between 2000 and 2001 (with no dates on the items and the Website giving only the range of dates), I put "[between 2000 and 2001]" as the date. Normally, I would code that information in the fixed field as "DtSt: q" and put both dates in the Date area. However, I had the recording dates for the plays, and, since a "p" DtSt has higher priority than "q", I coded the recording date in Date2. So, should the 2000 or 2001 go in Date1? I went with 2001, but I have never been certain.

Answer As I understand it, when you must code for a higher priority DtSt (such as code "p") but still have a questionable date (which would have been code "q") for Date 1, you would follow the input rule for code "q" as your Date 1. That would be the "earliest possible date" in Date 1, 2000 in this case.

Chief Source or Not Chief Source?

Question When the title is not in the chief source, a "source of title" note is given; then that source becomes the *de facto* chief source. Does that mean that anything in the "regular" chief source is now considered to be outside the CSI and should be bracketed? For example, the title of a video is only on the cassette label, but there are statements of responsibility in the end credits. It seems to me that the title frames, credits, etc. are still part of the CSI, along with the source of the title, and hence there need not be any brackets. A colleague of mine posited the above theory about the shift in chief sources; it seems logical too. What do you say?

Answer According to AACR2 7.0B1, the chief source of information for a

videorecording includes "its container (and container label) if the container is an integral part of the piece (e.g., a cassette)". So, the videocassette label to which you refer *is* part of the chief source and such a title would not need to be bracketed. This is in keeping also with the spirit of 1.0A3 in the 2004 Update of AACR2, officially implemented as of September 1, 2004: "If the information traditionally given on the title page is not complete on one source ... treat the sources as if they were a single source". But that sort of avoids your question. If a source of title note reads, for instance, "Title from container" (that is, a non-integral container), I interpret this to mean just that, that the title is taken from the container, rather than from the chief source and is therefore properly bracketed. Furthermore, this note refers only to the title. Since the statements of responsibility *do* come from the chief source (that is, the title frames), they would not be bracketed.

Definition of Type "m"

Question Can you provide a list of what can actually go on a computer file workform now? I know it has become rather limited.

Answer Following MARC21, OCLC's *Bibliographic Formats and Standards* (BFAS), currently limits the use of Type code "m" (Computer File) to "the following classes of electronic resources: computer software (including programs, games and fonts), numeric data, computer-oriented multimedia, online systems or services. For these classes of materials, if a significant aspect causes it to fall into another Type category, code for that significant aspect. Other classes are coded for their most significant aspect (e.g., language material, graphic or cartographic material, sound, music and moving image). In case of doubt or if the most significant aspect cannot be determined, consider the item a computer file". There is more detail in "Cataloging Electronic Resources: OCLC-MARC Coding Guidelines", which is on the OCLC Website
at:<<http://www.oclc.org/support/documentation/worldcat/cataloging/electronicresources/>>.

Follow-up Question There is always more to the story, it seems. While my colleagues tried to assert that if something is *all* computer-related, it goes on computer files format, I said that if it is essentially a monograph, it goes on monograph format (with an 006/007 to explain the "computer-ness" of the item). They were unconvinced. The case in point was a CD-ROM that was a conglomeration of items that the CD-ROM points to on the Internet.

The 520 for this CD looks like this:

520 "This CD contains information on ITC's various e-related training initiatives, diagnostic tools and advisory services designed to help small and medium-sized firms in developing countries and transition economies put 'e' to work and overcome the digital divide. This CD also contains best practice cases and publications on the issue of e-trade".--index.htm.

The 505 looks like this:

505 0 Overview -- Putting "E" to work -- The changing marketplace -- ITC at WSIS -- E-trade strategy -- E @ ITC -- E-Trade Bridge -- Case studies -- E-Publications -- Forum magazine -- E-related articles -- Books -- Technical papers. Almost all of it would be considered monographic in nature, except for, of course, the serial, *Forum Magazine*. With a conglomeration like this, should it be put on a computer file record, applying the option, "In case of doubt or if the most significant aspect cannot be determined, consider the item a computer file"? How would you catalog this?

Follow-up Answer The OCLC Web document that I mentioned above explains the changes that took place in MARC21 regarding electronic resources that were published in 1997 and implemented by LC, RLG, and OCLC in 1998. The current definitions and applications are also documented in MARC21, BFAS, and several of the LC documents to which there are links from the OCLC Guidelines, especially LC's "Guidelines for Coding Electronic Resources in Leader/06" <<http://www.loc.gov/marc/ldr06guide.html>>, which I would urge your colleagues to read.

From your explanation, the CD-ROM sounds as though it is a collection of mostly textual material. For the "diagnostic tools" in the CD, does this refer to the presence of the actual tools themselves (that is, software) or simply explanations of, or writing about, those tools? If the software tools themselves are present and constitute some substantial part of the CD-ROM (or are themselves the real reason for the existence of the CD-ROM), I would say that Type "m" is appropriate. However, if the tools themselves are *not* present (or they are there but in an unusable demonstration version, or the like), Type "m" would probably not be appropriate. The mere presence of links to remote Web resources does not make a textual resource Type "m" either. On the other hand, if there are, substantive videos (of someone explaining the use of one of the tools, for instance) along with the textual material, considering the CD-ROM not to have a predominant aspect might make sense, justifying Type "m".

As far as *Forum Magazine* is concerned, unless this CD-ROM is going to be released periodically with a new issue of the "magazine" embedded in it on some ongoing

basis, I do not think that this qualifies as serial material. (Of course, I say this as a complete ignoramus regarding serials cataloging.) Instead, it strikes me as more of analogous to the inclusion of a single sample issue of a journal or like the reprinting of articles from a serial in a monograph, or something like that.

So, if this CD is predominantly textual, it would go on Type "a" with field 006 (and 007) for the electronic aspects. You may, of course, more fully explain the contents in another note if that is appropriate.

Follow-up Response There are no actual diagnostic tools on this CD-ROM; it just mentions tools that are available (for money). There is even a PowerPoint presentation on the CD-ROM to show off the diagnostic tools. However, it is still just talking about the tools, not actually the programs themselves. Under the *Forum Magazine* link, it is just about the fact that it exists, with sample issues of the magazine; it does not appear that they will be putting out another one of these. So I believe this confirms that this is monograph format, needing 006/007 to explain the computer-related parts.

"Physical" Description of Remote Electronic Resources

Question I have a PDF that, according to vendors, is not available in print, yet is freely available on the Web. It is being cataloged as a remote electronic resource since, at 200 pages, our library has no intention of printing it out. Since physical description and extent can now be recorded for remote electronic resources, I am struggling with how to format subfield \$a of the 300 field. Has a decision been made about language and how, or if, to include page numbering? When the PDF is numbered, should the numbering it provides be used? What about unnumbered preliminary pages? Are they included--or not, as with books? Or should the total number of pages be given as it appears in the Adobe Acrobat reader? Here are the various options I have considered:

300 1 PDF (ix, 193 p.) [as numbered on the pages of the actual document]

300 1 PDF (203 p.) [as appears in the Adobe reader screen]

300 1 text file (PDF: ix, 193 p.)

300 1 text file (PDF: 203 p.)

Answer In the 2004 Update to AACR2 (currently available in print and on Cataloger's Desktop), the new option for including a "physical description" for remote access electronic resources is spelled out in rules 9.5B3 and 9.5C3:

"9.5B3. Optionally, record the extent of an electronic resource that is available only by remote access. Use an appropriate term preferably taken from subrule .5B of one of the chapters of Part I or a term in common usage. See also 9.5C3.

1 photograph
6 remote-sensing images
1 sound file
Web site

1 electronic text

"9.5C3. When recording the extent of an electronic resource that is available only by remote access, give other details about the resource (e.g., file types) if readily available and considered to be important.

1 photograph : digital, TIFF file

69 p. : digital, PDF file

3 sound files : digital, mp3 file

1 electronic text : HTML file

"If such characteristics cannot be given succinctly, give them in a note (see 9.7B10)."

Although examples remain "illustrative and not prescriptive" (Rule 0.14), these do suggest at least two reasonable standardized approaches. It would seem best to follow, as far as possible, the same subrules .5B referred to in 9.5B3 when recording numbered sequences, including preliminary paging. This all leads to the following suggestions:

300 ix, 193 p. : \$b digital, PDF file

or

300 1 electronic text (ix, 193 p.) : PDF file

Clearly, though, the new rules allow considerable (some would say excessive) flexibility on this, and it would be most valuable if there could be some kind of consensus on how to describe such resources precisely and succinctly.

Follow-up Question How should illustrations be recorded here? Illustrations would normally go in subfield \$b as well, but I am not sure of the form.

Follow-up Answer My suggestion would be:

145 p. : \$b digital, PDF file, ill.

or

1 electronic text (145 p.) : \$b PDF file, ill.

As I noted previously, I hope that the community can come to some sort of consensus on how to describe these, in the absence of any further assistance from the rules or LCRIs.

DTS and SDDS Designations for Videorecordings

Question In cataloging VHS & DVD videorecordings, and I have noticed that quite

a few of the VHS records in OCLC show line items in the 538 field something like this:

538 VHS, pan & scan (4:3) presentation; Dolby Digital, DTS, SDDS.

I thought that DTS and SDDS are abbreviations for technical capabilities only available on DVDs and similar digital formats. DTS is an alternate audio format similar to, but not the same as, Dolby Digital, so if the VHS has Dolby digital sound, it will not have DTS. As I understand it, DVDs provide the capability to have layers of recorded information, whereas VHS videos are one layer (see <<http://www.dvddemystified.com/dvdfaq.html#1.32>>). For a video I am cataloging, the copy indicates "DTS, SDDS" (as in the example above, but nowhere on the cassette or on the container for the VHS of this video is there any indication of DTS or SDDS. Is this something that catalogers need to be wary about, especially when copy cataloging or when cloning a "new" record for a video from a record for the same title on DVD?

Answer For this question, I consulted with my OCLC TechPro colleagues (with thanks especially to Mary Haessig and Lori Peare for their assistance and insights). First, let me give a little background on DTS and SDDS, based on information found in the "DVD Demystified" Website's link, "DVD Frequently Asked Questions (and Answers)" <<http://www.dvddemystified.com/dvdfaq.html>>, found there in various places, but especially in Section 3.6.2, "Audio details of DVD-Video".

- DTS (Digital Theater Systems) is a multi-channel digital audio format that some, but not all, DVD players support; I would suspect that even fewer (if any) VHS players support DTS.
- SDDS (Sony Dynamic Digital Sound) is another multi-channel digital audio format that is apparently not supported by any current DVD players (nor, would I again suspect, by any VHS players); it is further identified as "a theatrical film soundtrack format".

Catalogers transcribed the "DTS" and "SDDS" information from the closing credits of the videos in question. The appearance of these designations in the closing credits of the film strongly suggests to me that they apply specifically to the theatrical release rather than necessarily to any home video version (either VHS or DVD). My inclination would be to omit these designations from the 538 field if they appear only in the film's closing credits and not as part of the video-specific credits (on the label or on the packaging). If, on the other hand, there is clear indication on its label or packaging that the DVD is DTS encoded, then that information may certainly be included in the bibliographic record.

A Collection of Prints on CD-ROM

Question I am trying to catalog the wackiest thing--a CD-ROM that appears "home-made". It is essentially a collection of the scanned prints of an artist on a CD-ROM. The CD-ROM has no title, it is just a commercially available writeable CD-ROM. There is no indication who made it, where the prints came from, etc. Would this go on the computer format or books format? It seems that it could be considered to be like a collection of prints in an exhibit catalog, but there was no exhibit and no catalog in evidence. For the 260, should the date be guessed, since it was not really "published" in the normal sense? Or should it just be: "[S.l. ; s.n.]"? Somehow, it feels a little "illegal" to me, but my job is not to question how we got the thing, my job is to catalog it.

Answer Since it is a collection of still visual materials, the correct Type Code would be "k" (and probably TMat "i"). You will also need field 006 for the computer file aspect, with File coded "c". It also appears that you will need to supply a title. Likewise, in the absence of any publication information, you should supply "[S.l. : \$b s.n., \$c 200-?]", or something such as that, for the 260 field.

Placement of the Word "Stereo" for Videos

Question Should "stereo" be placed in the 538 field or should it go in the 300 field? If placing it in the 300 field should it look like this? I have seen it both ways. I could not find any information saying which way was right.

300 1 videocassette (60 min.) :\$b sd. col., stereo. ; \$c 1/2 in.

or

300 1 videocassette (60 min.) :\$b sd., col., stereo ; \$c 1/2 in.

or

538 VHS; Stereo.

Answer Two rules in AACR2 need to be consulted in this case. The first, Rule 7.5C3 for "Sound characteristics" of motion pictures and videorecordings, reads as follows: "Give *sd.* (sound) or *si.* (silent) to indicate the presence or absence of a sound track. If a silent film is known to have been photographed at the speed of sound film, give *si. at sd. speed*". In the absence of any further instructions here, we must conclude that this is the only information that can be included in the Physical Description Area. The next one is Rule 7.7B10, which describes how details of the physical description may be elaborated. Under Section (a) for "Sound characteristics", it reads: "Give any special characteristics of the sound component of a motion picture or videorecording (e.g., optical or magnetic, whether the sound track is physically

integrated with the film or the sound is separate on a synchronized recording)". The second example here is "Dolby stereo., mono. compatible". Although such a separate note for the sound characteristics may be included, this information is often combined with other appropriate physical description notes (as allowed by 1.7A5) in a note, as with your third example (except that "stereo" need not be capitalized).

On another note, please remember to add the period to the word "stereo", even though for common usage, the term "stereo" is considered a word in itself, *sans* period. Within the context of a bibliographic record, AACR2 considers the term to be an abbreviation for *stereophonic*, duly listed in Appendix B.9. The bibliographic record is a different realm of human experience, where all sorts of oddities, such as ISBD punctuation, hold sway. The abbreviated form of "stereo" is one of those oddities mandated by the rules.

Describing the Printout of a PDF File

Question What term or phrase in the 533 subfield \$a would best describe a printout of a PDF file that was sent to our library via interlibrary loan? The original remains only in paper form. PDF was the means of transmitting the document but the file does not remain. The following possibilities were considered:

533 \$a Printout.

533 \$a Printout. \$n Made from temporary pdf file.

533 \$a Printout of pdf file received via email.

533 \$a Printout of temporary pdf file received via email.

Answer In this electronic age, what may once have been a relatively simple issue of original versus reproduction can become very convoluted. If I understand the situation correctly, a print original was transformed into a PDF by the loaning library. The PDF was mailed to your library and then your library printed it out. After printing out the document, the PDF used for transmission was deleted. That makes this printout a third generation reproduction that happens to be in the same (paper) format as the original (although not necessarily in the exact same configuration). In the possibilities considered (above) for cataloging the printout, the use of field 533 suggests that you are proposing to catalog the PDF in the body of the record and that you have chosen to follow LCRI 1.11A for reproductions. While this is a legitimate way to deal with this, you may want to read the LCRI and instead use the option suggested by LC in the second paragraph to "delineate details of the reproduction on the record for the original manifestation rather than create a separate record for the reproduction". If that is appropriate for your situation, it may be a much simpler approach, allowing you to explain it in a local note, as you see fit. That would get around the conundrum of

cataloging the no-longer-extant PDF. The LCRI's Footnote 1 also allows you another option of not treating it as a reproduction at all, although the situation would need to be explained succinctly in any case. I suggest these alternatives mostly as a way to avoid deciding which actual "original" would properly be described in the body of the record created according to LCRI 1.11A, the paper original or the intervening PDF.

Extra Digits After the UPC

Question Are the 2 digits following the UPC (e.g. 024 1 012236161578 \$d 00) supposed to be transcribed? It is rarely recorded in the 024. If so, what is the purpose for it? Can it possibly aid in searching?

Answer Yes, any additional codes should be transcribed in subfield \$d, just as you have done. As to its purpose, generalizations can be difficult to make and judgment must be used in individual situations. As MARC21 defines the subfield \$d of 024, these additional codes are often "provided to identify price, title, or issue information". While it is not altogether clear what the cited "00" might mean, I figure that if the publisher included them, they must have considered the digits to have some meaning, however obscure. The same MARC21 definition refers to these as "optional digits", which certainly can lead to the interpretation that they may be omitted. Cataloging *is* an art, after all, and aesthetic considerations can be allowed to inform our cataloger's judgment.