2014
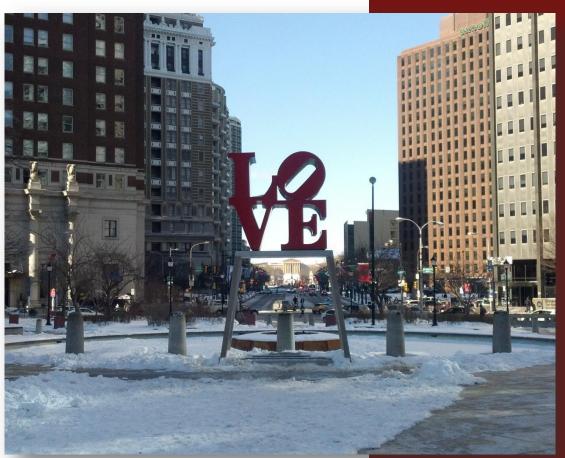
OLAC NEWSLETTER

OLAC loved being in Philadelphia for ALA Midwinter!
Photo courtesy: Christina Hennessey

Volume 34
Number 1

March
2014

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

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FROM THE PRESIDENT

Liz Miller

Dear OLAC friends,

As you know, OLAC is a friendly, pragmatic group dedicated to helping catalogers with nuts-and-bolts cataloging questions. Your membership dues help support activities that benefit you, such as keeping our web page up and running (and all those wonderful CAPC guides available), and funding our biennial conference. Most OLAC memberships came up for renewal at the end of 2013. If you have not already renewed your OLAC membership, please do.   And if you are not a member, please join us!   You can join or renew here: http://olacinc.wildapricot.org/Default.aspx?pageId=1715773

Thanks to the efforts of Past-President Heidi Frank and Outreach Coordinator Jeremy Myntti, OLAC's Facebook page is up and running! Please 'Like' and follow us at: https://www.facebook.com/OLACinc.

OLAC's Membership Meeting at ALA Midwinter in Philadelphia was largely devoted to a discussion about whether OLAC is meeting the needs of our members.   Some good observations and ideas were brought up. Most importantly, those present strongly validated the importance of our core mission: supporting catalogers of A/V and other non-book materials. Even though catalogers these days may devote more time to creating non-MARC metadata and processing batches of records (as opposed to cataloging one item at a time), OLAC's cataloging publications are still extremely valuable. One issue raised was the difficulty of finding candidates for OLAC Board positions. The requirement to attend both ALA yearly conferences as well as the biennial OLAC conference is seen as expensive in terms of both money and time commitment. We discussed the possibility of changing this requirement. Another issue brought up was a possible need for more formal guidelines for CAPC task force chairs and committees. Some excellent suggestions were offered, as well: sponsoring a pre-conference at ALA Annual (in non-OLAC Conference years); co-sponsoring more programs with ALCTS and other organizations; reinstating Q & A sessions at OLAC membership meetings; and sponsoring a "hackfest" organized around cataloging

issues. The OLAC Board will discuss how to follow up on these concerns and suggestions at our March 2014 virtual meeting.

Save the date: OLAC meetings at ALA Annual in Las Vegas:

- OLAC Membership Meeting: Friday, June 27th, 2:30-4:00
- CAPC Meeting: Friday, June 27th, 7:30-9:30

I don't have our room assignments yet, but will send that information to the OLAC-L list as soon as I have it.

It's not too early to start making plans to attend the OLAC/MOUG conference in Kansas City, to be held October 23-26th! It looks like it will be a fantastic conference, with a pre-conference on the NACO-AV Funnel, and many great workshops lined up. I hope to see you there!

OLAC Board elections are coming up this spring--we will be electing a Vice-President/President-Elect and a Secretary. Keep an eye on your inbox for your electronic ballot.

Finally, I want to thank my fellow OLAC Executive Board members for all the work they do year-round to keep OLAC going.   They are a dedicated group, and each does an outstanding job.   If you ever have any questions, concerns, or suggestions, please don't hesitate to get in touch with me or any Board member.

FROM THE EDITOR

Marcy Strong

It has been a long cold winter, but one of the highlights was certainly the ALA Midwinter meeting in Philadelphia. This snowy locale brought us all together to discuss RDA, special formats cataloging and the future of OLAC as an organization. To read more about our discussions, be sure to check out Liz Miller's column as well as the minutes from the membership meeting. In addition to the membership minutes, there are also minutes from the OLAC Board and CAPC meetings, plus we have full reports from CC:DA, Library of Congress, MARBI and SMaCR. Be sure to take a few minutes and catch up on all the latest developments in OLAC and the larger cataloging communities.

As Liz mentions in her column, OLAC is always looking for members to get involved with the organization. Bobby Bothmann makes a great case for saying "yes" in his Spotlight profile on page 35. Bobby, a familiar face to many in the OLAC community, describes how he got involved in OLAC and how he has learned to step outside his comfort zone to try something new.

Elections are right around the corner! Meet the candidates for Vice President and Secretary on page 10.

If you're looking to get involved with OLAC or to give back to your profession, we have a few lower-impact suggestions:

- Help improve video accessibility by spending a few minutes annotating credits at the OLAC Movie & Video Credit Annotation Experiment: http://olac-annotator.org/
- Promote OLAC updates to your friends and colleagues on social media! OLAC is now on Facebook and Twitter, so be sure to like and retweet us often.
- Become a liaison for OLAC and MOUG! If you're already a member of both organizations and actively attend their meetings, it will be relatively easy to provide reports to both.

TREASURER'S REPORT
2nd Quarter FY14
October 1 – December 31, 2013

Heather Pretty

<table>
<tr><td colspan="3" align="center">Treasurer's Report
2nd Quarter FY14
Heather Pretty, Treasurer</td></tr>
<tr><td></td><td></td><td></td></tr>
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<tr><td>OLAC Logo Work</td><td></td><td align="right">$75.00</td></tr>
<tr><td>OLAC Research Grant Reimbursement</td><td></td><td align="right">$316.01</td></tr>
<tr><td>ALA Annual Conference Stipends</td><td></td><td align="right">$500.00</td></tr>
<tr><td>OLAC Board Dinner, Annual 2013</td><td></td><td align="right">$417.98</td></tr>
<tr><td>SurveyMonkey Select Subscription</td><td></td><td align="right">$204.00</td></tr>
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<tr><td>Personal Membership</td><td align="center">166</td><td></td></tr>
<tr><td>Institutional Membership</td><td align="center">9</td><td>As of Dec 31, 2013</td></tr>
<tr><td>Total</td><td align="center">175</td><td></td></tr>
</table>

OUTREACH REPORT

Jeremy Myntti

Social Media

OLAC has recently joined both Facebook and Twitter. These social media sites will be used alongside the OLAC-L listserv to help spread important information about and relating to OLAC. Within the first five weeks of being on these sites, there have been 191 people that have liked OLAC on Facebook and 27 people follow us on Twitter.

With several topics being posted to both Facebook and Twitter each week, we are starting to gain an audience of dedicated followers who are liking, sharing, and re-tweeting our content. As of this writing, the most popular posts have been about our meetings at ALA Midwinter in Philadelphia with one of the posts nearly going viral with 517 views, or around than 2 ½ times our total membership!

We would like to encourage everyone to interact with our social media content by hitting *like* or *share* so that OLAC can be more visible in the cataloging and library communities. If you have ideas for content that you would like to see, let us know at outreach@olacinc.org.

If you haven't yet joined us on these sites, feel free to like or follow us at:

https://www.facebook.com/OLACinc

https://twitter.com/OLACinc

OLAC Logo Redesign

OLAC has been in the process of redesigning the logo for the past several months. In the coming weeks, OLAC members can look forward to receiving a survey to vote on their favorite design. After the survey has been completed and we have reviewed the results, we hope to make the announcement of the new logo at the ALA Annual Conference in Las Vegas.

If you have ideas for outreach opportunities that would be beneficial to OLAC or if you are helping to spread the word about this this great organization, please let us know at outreach@olacinc.org or jeremy.myntti@utah.edu.

12th Street Rag by Euday Bowman
Image courtesy of UMKC MNL LaBudde
Special Collections Dept.

CONFERENCE CORNER

Mary Huismann and Wendy Sistrunk

Goin' to Kansas City![1]

Plan to join your OLAC and MOUG colleagues at the joint conference to be held October 23-26, 2014 in Kansas City, Missouri.

The overall theme of the Joint OLAC/MOUG 2014 conference is **A/V Cataloging at the Crossroads**, and there couldn't be a better place to meet. Kansas City was founded in 1838 as the Town of Kansas at the confluence of the Missouri and Kansas rivers and was a "cross-roads" for many a trail heading west. At the conference you will find wonderful presentations, workshops, and poster sessions to help us all traverse those crossroads.

Program

We are planning a pre-conference workshop Oct. 23 on creating local and/or national RDA NACO-AV headings, led by Peter Lisius.

We have yet to finalize our keynote speakers, but we expect the theme of the conference will be one reiterated throughout the meeting. Hopefully, too, look for a presentation or two on the Bibliographic Framework Initiative (BIBFRAME), an undertaking by the Library of Congress and the community to better accommodate future needs of the library community to more web-based, Linked Data standards.

Of course, RDA and its best practices for the A/V and music communities will be a thread running through many of the presentations. While in the spirit of RDA, we are trying to edge away from "format-specific" types of training, but we all still need that help! Look for workshops offered on specifics for providing access to scores, sound recording, video recording, and maps formats.

Registration

We will be offering online registration as well as paper, and the Early Registration deadline will most likely be by September 23, 2014 (stay tuned!). We are finalizing the price, but it should be in line with past conference registration costs. After Early Registration deadline, the individual registration and/or hotel prices will go up. On-site registration will be available.

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[1] Yes, a footnote! "Kansas City" is a rhythm and blues song written by Jerry Leiber and Mike Stoller in 1952, and starts with "I'm goin' to Kansas City, Kansas City here I come…"

Conference Hotel

The conference is to be held at the [Kansas City Marriott Country Club Plaza](#) overlooking this premier shopping and entertainment district, which is also near the historic Westport area. You will be able to make your reservations online (as soon as we get the PayPal account coordinated) or by contacting the hotel directly at 1-800-810-3708. Conference hotel rates start at the very reasonable price of $119/night.

Transportation

It's very easy to get to Kansas City. The [Kansas City International Airport (MCI)](#) is located just a twenty minute drive from downtown Kansas City and is one of the nation's most convenient airports, serving all major airlines. From MCI, it's quick and easy to reach the Marriott Country Club Plaza. There are several options for [ground transportation](#) to and from the hotel.

Attractions

The University of Missouri--Kansas City (UMKC) [Miller Nichols Library](#) is not far from the conference venue, and includes collections of interest in the Marr Sound Archives, the Music/Media Library and the LaBudde Special Collections Department. The area is home to numerous colleges, universities, and archives. A list of other area libraries and archives will be made available.

Other local attractions include: The Kauffmann Center for the Performing Arts, the American Jazz Museum, Arabia Steamboat Museum, Hallmark Visitors Center, the Nelson-Atkins Museum of Art, and the Liberty Memorial. Organized tours and a Local Arrangements reception are in the final planning stages. A list of area restaurants will be provided, with BBQ joints highlighted!

The web page for the conference is nearly ready for "publication" and will contain All the News That's Fit to Print!

Members of the KC OLAC-MOUG Conference Local Arrangements Committee include:

Wendy Sistrunk, chair***$**
Richard Baumgarten*
Merry Bower*
Felicity Ann Dykas*   *   Denotes OLAC member
Margaret Kaus*$ $ Denotes MOUG member
Mary Huismann*$
William (Mac) Nelson $
Evelyn Pypes *
Kathleen Schweitzberger *
Michelle Turvey-Welch*

MEET THE OLAC CANDIDATES

It is time for elections once again! The open elected Executive Board positions this year are **Vice President/President Elect** and **Secretary**. The duties for each office are given in the OLAC Bylaws under Article V, §3, with more detail in the OLAC Handbook under the heading OLAC Executive Board. All current personal members are eligible to vote. An electronic ballot shall be delivered to the last email address you provided to the OLAC Treasurer. If you require a paper ballot for any reason you must contact the Elections Committee Chair to make the request. This year's chair is:

Amy Weiss
Associate Director for Technical Services
Florida State University Libraries
850-644-6321

This year we have one candidate apiece for the open positions. The ballot will ask that the slate be accepted by acclamation. The candidate for Vice President/President Elect is Stacie Traill, and the candidate for Secretary is Jennifer Eustis. Their biographies and statements are below.

Elections will be held in April. More specific information is forthcoming.

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Candidate for Vice President/President Elect
Stacie Traill
Cartographic and Electronic Resources Cataloger
University of Minnesota

Biographical statement:

Over the course of my cataloging career, I have had the opportunity to work with library resources in nearly every physical and electronic format, including maps, music, audiovisual materials, e-books, and other online resources. I have been a member of OLAC since 2002, and I have always considered OLAC to be my "home" professional organization.

I am currently Cartographic and Electronic Resources Cataloger at the University of Minnesota. Prior to my current position, I was Special Formats Cataloger/Coordinator at the same institution, and I received my MLIS from the University of Wisconsin-Milwaukee while working at the U of MN as a paraprofessional music cataloger. I have served as a member of OLAC's Cataloging Policy Committee since 2009, and have been a part of various CAPC task forces. I'm an active researcher, and have published and presented on discovery system evaluation/implementation and the quality issues and management of electronic resources metadata.

Vision for OLAC:

I believe one of OLAC's greatest strengths is its ability to balance principle-based cataloging with practical, user-centered guidance that is adaptable for libraries of all sizes and types. In a world where standards are both evolving and multiplying, OLAC's role in shaping and sharing good cataloging practices is more critical than ever, and I would work hard to help the organization build on its long record of success.

Candidate for Secretary
Jennifer Eustis
Catalog/Metadata and French & Francophone Studies Librarian
University of Connecticut Libraries at Storrs

Biographical statement:

Jennifer Eustis is the Catalog/Metadata and French & Francophone Studies Librarian at the University of Connecticut Libraries at Storrs. She is responsible for creating and editing metadata for audiovisual resources, electronic resources, and archival materials in addition to her duties as liaison to the French & Francophone studies program. Before coming to the University of Connecticut Libraries, she was the metadata librarian at Northeastern University. She holds a M.S. from Simmons College in Library and Information Studies and a Ph.D. in Philosophy from Dominican University in Ottawa, Ont.

Vision for OLAC:

As an organization, OLAC strives to support its membership by providing information and opportunities for impacting the latest practices, standards and issues in regards to audio-visual materials. Over the years, I have been lucky to be able to take advantage of this support such as the best practices for DVD cataloging. Also during this time, I have been able to gain experience in local library associations such the New England Technical Services (NETSL) group, New England Library Association (NELA) and in helping to organize local conferences such as THATCamp (The Humanities and Technology Camp). Thanks to my experience, I can bring to OLAC my past board experience. I have organized and run meetings both virtually and in person and coordinated conference planning. As President of NETSL, I was further responsible for administering our various systems such as WordPress, wiki or our Google Apps. I also help NELA with technical issues as part of their new virtual help desk for board members. Recently, I was the THATCamp's WordPress administrator. I credit this experience in part thanks to my attention to detail and enthusiasm for giving back to the profession. As Secretary, I would be honored to bring this experience and passion for audio-visual cataloging and related issues to the OLAC board.

MEETING MINUTES

Scott M. Dutkiewicz

OLAC Executive Board Meeting
ALA Midwinter Conference
Philadelphia, Pennsylvania
Friday, January 24, 2014, 4:30 p.m.
Minutes approved March 4, 2014

Present: Liz Miller, Scott Dutkiewicz, Mary Huismann, Heather Pretty, Marcy Strong, Jeremy Myntti, Heidi Frank, Marcia Barrett, Jay Weitz

Absent: Amy Weiss

President Liz Miller called the meeting to order at 4:45 p.m.

1. **2014 Elections** (Miller for Amy Weiss). The report stated that Stacie Traill is the candidate for Vice-President/President Elect and Jennifer Eustis for Secretary. This report was accepted by the Board.

2. **Treasurer/Membership Coordinator report** (Pretty). At the end of November, the Bank account was transferred from Bruce Evans' name to Pretty's. At the end of December Evans sent the materials, but no checks were included. Checks have been ordered. As a result, $600 in payments remains outstanding. There was a question about the use of electronic payments. Pretty will investigate.

3. **Outreach report** (Myntti). Facebook needs more exposure by readers who "like" the page; 45-60 persons see the posts, which is a bit of a concern. Myntti will continue to add daily posts; he also wants to do biographies with a picture of board members (100 words or less). The possibility of a Twitter connection was raised. This would require a strong Twitter user. Discussion turned to the possibility of connection to other cataloging-related Facebook pages. Myntti noted that a link to OLAC in Wikipedia needed updating. There is also the option to create a Wikipedia page for OLAC; this would require citations outside OLAC. Ideas were suggested for such sources. Frank and Myntti will collaborate on the logo redesign. They plan to remove color from the one colored prototype, adjust fonts, and present three designs to a membership survey. The survey will ask for a ranking and comments on the designs.

4. **CAPC report** (Huismann). The RDA Revisions Task Force (Stacie Traill, chair) has completed its charge, and is awaiting instructions. Huismann sought Board guidance as to how to best deploy this group. In this connection the RDA-DVD guide now has a revised outline and the document is being prepared for review. Huismann had questions about the membership of this Task Force, whether a deliberate renewal of membership should occur. The Board recommended that CAPC allow members to self-assign and integrate available RDA revision members. In either case, specific charge and deadlines will be applied. Huismann has three candidates for CAPC interns for the two positions (one with incomplete application). These will be posted to Board members for review and approval. CAPC meeting attendance requirements came up again and the alternatives were discussed.

5. **OLAC archives update** (Miller). The committee that Miller is forming will meet in February.

6. **OLAC 2014 Conference update** (Miller for Wendy Sistrunk). Ideas for the keynote and endnote speakers are needed. Since Bibframe is a topic of interest, contacts at the Library of Congress and Zepheira should be explored.

7. **Nancy B. Olson award** (Frank). Frank will send out a message to the membership explaining that since there were no nominations, there will be no award for 2014, with a reminder that the award will be available for nominations for 2015.

8. **OLAC 2014 research award** (Barrett). The application deadline for this award closes in early March.

9. **Bylaws rewrite** (Dutkiewicz). Working from a draft dated November 21, 2013, the Board suggested revisions to the Bylaws at several points in the text and approved inclusion of sections that had been integrated from the Handbook. Dutkiewicz will send out a new draft incorporating these changes and recommendations. Once the Board approves, the next steps will be to organize a membership vote on the new Bylaws, then the revision of the Handbook may proceed.

Meeting was adjourned at approximately 5:30 p.m.

Cataloging Policy Committee (CAPC)
ALA Midwinter Conference
Philadelphia, Pennsylvania
Friday, January 24, 2014, 7:30 p.m.
DRAFT

Present: Members: Mary Huismann (chair), Annie Glerum, Laurie Neuerburg ; ex-officio: Kelley McGrath, Cate Gerhart, Jay Weitz

Others attending: Janis Young, Scott M. Dutkiewicz, Marcy Strong, Liz Miller, Bryan Baldus, Carolyn Walden, Adolfo R. Tarango, Ray Schmidt, Heather Pretty, Heidi Frank, Hikaru Nakano, Marcia Barrett, Teri Frick, Rosemary Groenwald, Andrea Leigh, Christina Hennessey, Bruce Evans, Linda Geisler, TJ Kao, Autumn Faulkner, Edward Leddy, Jeremy Myntti.

Chair Mary Huismann called the meeting to order at 7:30 p.m.

1.   **Welcome and introductions**

2.   **Approval of minutes.** The minutes of the June 28, 2013 meeting were approved.

3.   **Announcements.**

McGrath described the Movie Credit Annotation Project and is seeking ideas on how to increase and sustain participation.

4.   **Reports and discussions:**

a. **CC:DA report** (K. McGrath). McGrath reported that the last Joint Steering Committee meeting (Nov. 2013) has taken up the matter of "color" with a new approach envisioned that would be applied across all materials. As for current issues, she discussed two. First was the duration of moving images versus the duration of performance times. For the most part this involves a rewrite of the RDA section (7.22). Second was the ongoing dilemma about recording statements of responsibility, performers and credits (as in 245$c, 508 and 511). Should the statement of responsibility for moving images be optional? Should MARC tags or indicators be proposed to parse all of these entities? No clear solution was forthcoming. Andrea Leigh remarked that LC is rethinking how RDA will be applied with moving images and recorded sound.

b. **MARC Advisory Committee (MAC) report** (C. Gerhart). Gerhart reviewed recent discussion papers that are before the MAC. They include: use of indicators in 588 for serials to reflect display constants; subfielding qualifiers in 6xx fields; the use of bit rate in 347$f for streaming images; coding unpublished CIP records; linking fields in authority records; and RDA relationship designators. Gerhart will report the outcome of the MAC meetings in the OLAC Newsletter.

c. **LC report** (J. Young). .

d. **OCLC report** (J. Weitz). Weitz touched on four sections of his "News from OCLC." He described the pilot project that will allow member libraries to merge duplicate records in WorldCat. Four institutions are participating in the pilot. This is being applied to books only. He also described the progress on the updating of BFAS. Updates from Technical Bulletins 261 and 262 are now incorporated. Watch for "last revised" notes at the bottom of pages. Connexion Client 2.5 has been released. OCLC users must upgrade by March 31, 2014. He also mentioned new data and visualizations of MARC usage in WorldCat. Developed by OCLC Research, this website depicts how tags and fields are actually used.

e. **MOUG report** (M. Huismann) Huismann reported that a new OLAC-MOUG liaison is needed. She also announced MOUG's 2014 annual meeting, with the Music Library Association, in Atlanta, GA, to be held Feb. 25-26, 2014.

f. **AMIA Cataloging and Metadata Committee report** (M. Huismann for Thelma Ross). Huismann reported on AMIA's project to produce a revised edition of the 2001 AMIA Compendium of Moving Image Cataloging Practice. Anyone who would like to be involved is encouraged to contact Thelma Ross (tross@oscars.org). A new survey will be sent out in January 2014.

g. **NACO-AV report** (M. Huismann for Peter Lisius). Huismann summarized the status of contributors and their training status; for the year Oct. 1, 2012-Sept. 30, 2013) 3,095 new names were added with 822 changes. There is a need for additional reviewers and an assistant coordinator. A NACO-AV preconference is planned for the OLAC 2014 conference. Lisius also shared long-term ideas about developing best practices documentation, evaluating the AV authority tools page on the OLAC website, and offer training in contribution of uniform titles.

h. **Subcommittee on Maintenance for CAPC Resources (aka SMaCR) report** (R. Leigh)

i. **Audiovisual Materials Glossary Update Task Force report** (H. Frank) Heidi Frank reported that AV term review and mapping to the database is ongoing. Users should note a new link on the OLAC site.

j. **RDA Revision Proposals Task Force** (M. Huismann for S. Traill) Huismann stated that the Task Force has addressed the items under its charge. Discussion ensued whether is group should be a standing committee; the OLAC Board will release a decision concerning its future.

k. **DVD/Blu-ray Disc RDA Guide Task Force** (M. Huismann) Huismann reported that Diane Robson, chair of the task force, resigned last fall. Huismann will serve as the new chair. A decision to delay presentation of the present draft to CAPC was made in consultation with the OLAC Executive Board and task force editors. The document has now been recast as more of a

"best practices" guide to cataloging in RDA rather than a simple revision of the previous AACR2-based guide. The new approach will provide better guidance for cataloging these materials in RDA while acknowledging that RDA practice is still evolving. A new outline for the document has been prepared and sent to the task force advisors for review. Next steps involve drafting sections newly added to the document and re-writing selected sections of the previous draft document. The goal is to have a draft for review in the next few months, with a final document for CAPC approval at ALA Annual.

l. **Streaming Media/Video RDA Guide Task Force** (M. Huismann for J. Ho) Huismann relayed that this guide is nearing completion with CAPC review adjusted to March or April 2014. Provider neutral issues held the work up for some time; since then the task force has since edited the document to allow more choices among catalogers.

5.   **New business**

a. **Future RDA guides**—topics and timelines (M. Huismann). Meeting attendees offered suggestions for future guides: CD, DVD, ROM; USB devices; video games; batchloading; Playaways. Videogames appeared to have strong support. Report any other ideas to Huismann.

b. **Revision/presentation issues for CAPC guides** (M. Huismann) Huismann lead the discussion about the possible need for a comprehensive style sheet for CAPC guides. Meeting attendees also discussed the matter of how guides should be arranged: by RDA or MARC order?

c. **Suggestions for presentations at ALA Annual in Las Vegas** (M. Huismann) Suggestions for presentation at the membership meeting at ALA Annual were discussed. Consensus was that the newly-minted guides (for streaming media and DVD/Blu-ray) would be appropriate.

In connection to ALA Annual, the matter of required meeting attendance for CAPC members came up. There are now many alternatives to face-to-face meetings, such as Skype and conference calls. A suggested approach would be to allow task forces to function outside face-to-face meetings and require CAPC members to attend some portion of ALA meetings over the course of their term. In any event, dialogue is required in CAPC work. While the technology exists for virtual meetings of CAPC, costs also attend this approach. Comments and suggestions about this matter are welcomed.

6. **Adjournment.** The meeting was adjourned at 9:30 p.m.

OLAC Membership Meeting
ALA Midwinter Conference
Philadelphia, Pennsylvania
Friday, January 24, 2014, 3 p.m.
Minutes approved March 4, 2014

Present: Liz Miller, Scott Dutkiewicz, Susan Moore, Mary Huismann, Heather Pretty, Stacey Penney, Marcy Strong, TJ Kao, Betty Landesman, Rosemary Goenwald, Jeremy Myntti, Monica Espitia, Heidi Frank, Marcia Barrett, Kevin Furniss, Jay Weitz, Kelley McGrath, Tina Gross, Annie Glerum

Discussion at the OLAC Membership meeting
Photo courtesy: Marcy Strong

1. **Welcome and Introductions**
   President Liz Miller called the meeting to order at 3:00 p.m.

2. **Announcements**
   a. **Executive Board elections** (Miller for Amy Weiss). Miller reported that there is one candidate for Vice-President/President Elect (Stacie Traill) and Secretary (Jennifer Eustis).

   b. **Nominations for the Nancy Olson Award** (Frank). Frank stated that there were no nominations received; hence no award will be given in 2014.

   c. **OLAC Research Grant Award** (Barrett). Barrett announced that the deadline is in early March for this award.

   d. **Credit Annotation Project** (Kelly McGrath). McGrath described the progress on this OLAC-supported project. An estimated 20,000 credits have been completed. However, since the program underlying the project does not support any tracking features, it is not possible to accurately count how many credits have been done or by which contributors. McGrath is seeking ideas on how to promote consistent participation. Some ideas were: list serves, library schools and cataloging instructors, in addition with the OLAC website and Facebook page.

e. **Cataloging video games** (Barrett). Barrett is involved with a non-OLAC project pertaining to the challenges faced when cataloging video games; a survey on this topic will be distributed on OLAC-L.

3. **Reports**

   a. **2014 OLAC Conference** (Miller for Wendy Sistrunk). The 2014 OLAC Conference will be a joint OLAC-MOUG event, to be held on October 23-26, 2014 in Kansas City, MO. The theme is "A/V Cataloging at the Crossroads." Early registration is set for September 2014. Recommendations for keynote/endnote speakers are welcome.

   b. **Secretary's Report** (Dutkiewicz). Dutkiewicz provided highlights of Board activity since ALA Annual in Chicago in June 2013. Two conference calls were held (Sept. 24, Oct. 2, 2013) and numerous email exchanges occurred about Board business. Significant decisions and approvals were made: a notice on tax-exempt status was sent to the membership (Sept. 2013), Jeremy Myntti joined the Board as Outreach Coordinator (Sept. 2013), documentation to restore tax-exempt status was submitted to the IRS by Bruce Evans (Nov. 2013), two committees were appointed (Elections Committee, and, Research Awards Committee, Nov. and Dec. 2013, respectively), Wild Apricot (membership database) was approved for a 2-year trial, and extra storage was purchased for it (Dec. 2013).

   c. **Newsletter Editor's Report** (Strong). Strong announced that a new editor of the "Spotlight" feature in the OLAC Newsletter will be needed for the June 2014 issue.

   d. **Treasurer's Report** (Pretty). Pretty stated that the treasurer's report shows a balance of $13,907.45. 4 payments are outstanding. Membership was at 175 (166 personal and 9 institutional). With the December migration to Wild Apricot, it is now 200, with 61 overdue or pending memberships. Expired members will be imported into Wild Apricot soon in order to reach out to expired members to renew. The tax-exempt reinstatement has been "received" by the IRS; processing may take up to 6 months. The OLAC Handbook will be updated so that such a lapse does not occur in the future.

   e. **Outreach/Advocacy Report** (Myntti). Myntti reported that OLAC's Facebook page is in operation. It has garnered 183 "likes" of which half are members of OLAC. An OLAC logo redesign survey will go out in the next few weeks, with a redesign projected for June's ALA annual conference.

4. **CAPC Report (Huismann).** Huismann reported that there have been 3 applications for CAPC intern positions. Peter Lisius is the new NACO-AV coordinator. He is seeking a new assistant coordinator. The Streaming Media Task Force is close to completing its work. Issues relating to provider-neutral records had delayed this project. The chair of the RDA-DVD Task Force had resigned; Huismann now chairing, and the best-practices document should be finished by ALA Annual. The RDA Revisions Task Force is now inactive. CAPC is seeking ideas on the next round of projects based on RDA.

5. **Open discussion: The Future of OLAC (Barrett and Miller)**
   Barrett and Miller co-facilitated a discussion about OLAC, the benefits of membership, and the status of its leadership. While membership has fallen in recent years, perhaps due to the newsletter

and best practices guides being made freely available, there is evidence that OLAC still fills a real need for guidance on how to catalog special formats materials. The long-anticipated RDA-DVD guide and recurring need for help with video games are examples. There are also trends toward batch editing and metadata work.

The nomination result for leadership positions is another concern, but many organizations face this problem. ALA conference attendance may be creating a hurdle. There was discussion about how this factor could be mitigated with the use of Skype, or virtual discussions, with times in the spring and fall of the year.

CAPC chairs need to keep committee members active. There is suggestion to provide guidelines for how to chair a task force, and to have a formal appointment process for task forces that communicates clear timelines, communication, and expectations. Best practices documents should make recommendations to vendors who create records.

Since the core mission is relevant, there is a need to develop presentations, since these provide additional rationale for individuals to attend the meetings. CAPC tasks could be converted into such presentations. Discussion moved to the costs for presentations; it was suggested that Midwinters use discussion/Q&A formats; and put on a workshop/presentation at annual ALA meetings. The possibility of a preconference (in non-OLAC conference years) that OLAC could charge for (with OLAC members discounted) was raised.

OLAC needs to connect better with ALCTS, which, in the opinion of some, is not acquainted with OLAC very well. OLAC needs to identify partners within ALCTS or other groups. A careful examination of ALA's Handbook of Organization could yield possible points of collaboration.

The content of this discussion might be used to formulate a survey to the membership to identify common themes and elicit more ideas. Some questions might probe whether meeting times conflict with other groups or the reasons why members cannot attend.

The meeting was adjourned at 4:30 p.m.

** REPORTS FROM THE **
2014 ALA Midwinter Conference
Philadelphia, PA

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

Liaison Report

submitted by Kelley McGrath
University of Oregon Libraries

The Joint Steering Committee for the Development of RDA (JSC) met November 4-8, 2013. The outcomes of this meeting are posted at http://www.rda-jsc.org/2013JSCmeetingoutcomes.html. Kathy Glennan, the ALA representative to the JSC, has posted her summary of that meeting and other recent JSC activities at http://alcts.ala.org/ccdablog/wp-content/uploads/2014/01/jsc201401.pdf. Of the topics discussed at the November JSC meeting, there are a couple that are likely of particular interest to OLAC members.

ALA had submitted a proposal to merge the instructions for recording color for moving images, still images and illustrative content into a single instruction (http://www.rda-jsc.org/docs/6JSC-ALA-26.pdf). After the discussion at the November meeting, ALA withdrew the proposal. Gordon Dunsire, the CILIP representative, will develop a proposal for the 2014 JSC meeting that models color as two distinct elements. The identification of monochrome vs. polychrome and of specific colors will be separated from the description of various production processes (such as tinting and toning) that can modify the color content of a resource.

A proposal to clarify the instructions concerning titles of parts and the collective title or common title was approved (http://www.rda-jsc.org/docs/6JSC-CCC-11-Sec-final.pdf). RDA 2.3.1.7 Titles of Parts, Sections, and Supplements currently says that if the title of a separately issued part and the title that is common to all the parts are presented on the same source of information then the cataloger should record the common title followed by a period and the part title. This instruction was revised to say that when both a part title and the title that is common to all parts appear on the same source and the part title is sufficient to identify the resource, the part title should be given as the title proper. There is an exception for serials and integrating resources that says to always give the common title followed by the part title even when the part title is sufficient to identify the resource. This represents a change for the cataloging of television series or publisher's video series when the title of the episode is sufficient to identify the resource. However, it remains to be seen if the change in RDA will have any effect on the LC-PCC policy statement on titles of television programs.

There were also three music-related proposals discussed at the November JSC meeting. Some music-specific instructions related to suites were approved (http://www.rda-jsc.org/docs/6JSC-Music-1-Sec-final.pdf) and changes were made to clarify the instructions for recording a preferred title consisting solely of the name of one type of composition (http://www.rda-jsc.org/docs/6JSC-Music-2-rev-2-Sec-final.pdf). A final proposal makes the instructions for recording the medium of performance as a data element more granular than those for including it in an authorized access point (http://www.rda-jsc.org/docs/6JSC-Music-3-Sec-final.pdf). This will enable catalogers to record more detailed data to enable searching and faceting while keeping authorized access points consistent with existing authorized access points.

The changes to the instructions from the November 2013 JSC meeting will become effective with their publication in the April update to the Toolkit.

The JSC previously asked ALA to investigate the inconsistency between the Statement of Responsibility element in Chapter 2 and the Performer, Narrator, Presenter and Artistic and/or Technical Credit elements in Chapter 7. CC:DA tasked OLAC and MLA with this investigation since our communities are the ones most impacted by these instructions. The OLAC and MLA group working on this struggled with this issue and was unable to come up with a principled way to define these elements separately. It is particularly difficult to distinguish the Statement of Responsibility from the Artistic and/or Technical Credit element. OLAC and MLA submitted a discussion paper to CC:DA at Annual last year that outlined several possible ways to address this problem without identifying a preferred approach. At that meeting CC:DA asked us to return with a proposal or discussion paper that recommends a suggested course of action and articulates any related questions. At that time, we had generally favored removing the Performer and Artistic and/or Technical Credit elements from chapter 7 and making them notes in chapter 2. However, it has proven very difficult to find an appropriate place to incorporate these elements in chapter 2. Chapter 2 deals with manifestations and the thing that ties the statement of responsibility to the manifestation is transcription. Since notes on performers or artistic and technical credits are not necessarily transcribed, they lack that connection to a specific manifestation.

More recently, we have been exploring the possibility of simply removing the references in chapter 2 that direct catalogers to chapter 7 for certain types of statements of responsibility. The two options would then no longer be mutually exclusive and the decision as to whether to record any given statement of responsibility in the Statement of Responsibility element or in the Performer, Narrator, Presenter or Artistic and/or Technical Credit element would be left up to the individual cataloger or to policies developed outside of RDA. The Performer, Narrator, Presenter and Artistic and/or Technical Credit elements are in the section of chapter 7 dealing with elements related to the expression. However, some roles that RDA associates with the work have traditionally been recorded in the Artistic and/or Technical Credit element (e.g., cinematographer). It would be desirable to have the flexibility to record other roles that RDA associates with the work in the Artistic and/or Technical Credit element, as well. A new element for artistic or intellectual credits related to the work will have to be added to the section of chapter 7 for elements related to the work in order to accommodate this need. During the discussion at CC:DA there were no major objections to this idea. OLAC and MLA will develop a proposal fleshing out this approach for the CC:DA meeting at Annual 2014.

MLA would like to improve the clarity of the instructions in RDA 7.22 for the recording of durations of resources other than audiovisual resources and asked OLAC for our support. RDA 7.22.1.3 contains detailed instructions for recording the duration of audiovisual resources in a variety of circumstances. Presumably, RDA intended those patterns to apply to other elements describing durations, such as duration of performance time for notated music at RDA 7.22.1.4. However, the current format of the instructions does not make this clear. MLA and OLAC suggested to CC:DA that RDA 7.22 could be reworked so that there is a general introductory instruction that applies to all the specific types of duration similar to that used at RDA 3.5.1.3 Recording Dimensions (http://alcts.ala.org/ccdablog/?p=997). CC:DA agreed with this approach and we will prepare a proposal.

There was a brief discussion at CC:DA about OLAC's failed proposal from last year (http://www.rda-jsc.org/docs/6JSC-ALA-16.pdf) in which we attempted to address some problems with and gaps in the values for video encoding formats. We also tried to introduce new elements for types of optical discs and methods of recording data on them. The JSC rejected the proposal and expressed a preference for using external vocabularies. The external vocabularies that were suggested are (https://www.nationalarchives.gov.uk/PRONOM/Default.aspx and http://www.digitalpreservation.gov/formats/index.shtml). These are highly technical vocabularies that lie beyond the area of OLAC's expertise. They seem to be more appropriate for preservation and settings such as digital libraries where files are being managed internally. OLAC's suggestions were aimed more at a level of practical detail for typical scenarios involving licensed and purchased electronic resources.

John Attig, ALA representative to the JSC at the time, did not volunteer ALA to follow up on this and the expectation was that those making the objections and those with the appropriate technical expertise would develop an alternative approach relying on external vocabularies. However, no action appears to have been taken. At the CC:DA meeting, it was decided to first refer the problem to ALA's Preservation & Reformatting Section (PARS). PARS may have suggestions for moving forward or this may be a project that they would be willing to take on. If that fails, Kathy Glennan will follow up with the JSC again.

In other noteworthy news, "the RDA elements and relationship designators have been published in the Open Metadata Registry (OMR) as Resource Description Framework (RDF) element sets suitable for linked data and semantic Web applications." See the full announcement at http://www.rda-jsc.org/RDAelementvocabs.html.

Library of Congress

Liaison Report

submitted by Janis L. Young
Library of Congress, Policy and Standards Division

Integrated Library System. The Library will upgrade its Integrated Library System (ILS) to Voyager 8.2.0 beginning Friday, Feb. 7, 2014. The upgrade will be completed by Monday, Feb. 17. During the upgrade, all databases and catalogs will be available to staff and public users for search and retrieval, except for very brief outages as servers and systems are re-started.

The Library has tested fixes to the re-designed LC Online Catalog and found that performance problems have been resolved. That new interface is available to staff and patrons at http://catalog2.loc.gov. The Library plans to implement the new interface in March 2014. The old catalog interface will continue to be available for a short time.

The catalog interface has been redesigned to reflect LC's latest web standards and provide Americans with Disabilities Act accessibility for most adaptive devices and applications. All functionality is available and the same keyword, guided keyword, browse, and quick search options remain, with search results available with the same sort options as the "classic" OPAC. New features and functions will also be available: more context-sensitive help; similar types of searches/indexes grouped together logically, e.g., browse searches; ADA compliance; and standard "share" tools available on all pages.

Personnel Changes.

Tom Yee retired on Jan. 3, 2014. Tom served as acting chief of PSD in the late 1990s, and again since December 2012. He had also served as the acting chief of the Asian & Middle Eastern Division since January 2012. Beacher Wiggins, director for ABA, is acting chief of PSD. Angela Kinney, chief of the African, Latin American, and Western European Division (ALAWE), is serving as acting chief of ASME.

Ron Goudreau, PSD Data Integrity Section head, retired Sept. 30, 2013 after over thirty years of service to LC. Judith Cannan, chief of the Cooperative and Instructional Programs Division (COIN), is acting section head of the Data Integrity Section. Paul Frank of COIN is managing the LCSH Monthly List process.

Joseph Bartl, head of the Music Division's Bibliographic Access Section, retired Jan. 24, 2014.

The Library has authorized the filling of three chiefs' positions within ABA. The application period for the chief of the US/Anglo Division closed Jan. 13, 2014. The vacancy announcement for the ASME chief is to be issued by the end of January. The position of chief of USASH will be filled after the position description is developed. All three positions will be filled internally.

Bibliographic Framework Transition Initiative (BFI).

The Library of Congress published on the web in November 2012 a high level model for the New Bibliographic Framework, *Bibliographic Framework as a Web of Data: Linked Data Model and Supporting Services*. Available at http://www.loc.gov/marc/transition/news/bibframe-112312.html, LC intends to keep it stable except for augmentations for the next year. LC also improved and expanded the software code sets that convert current MARCXML records to BIBFRAME, aligning them with the new stable vocabulary. They are available both as a service and for download, but the emphasis for the next year is intended to be on working with all types of data in the BIBFRAME model, not just MARC.

This year is for test implementation by organizations in the community. The testers will use the vocabulary that was published in November to experiment with the model against various environments, exchanging issues and information. This group will be open to all who show that they are actually engaging in test implementations. For more information, email bfcomments@loc.gov.

The Library continues to maintain the BIBFRAME electronic discussion list; subscribe from the web site at http://www.loc.gov/marc/transition.

The Library of Congress New Bibliographic Framework Update Forum will take place in Philadelphia on **Sunday, Jan. 26, 2014 (10:30am-12:00pm, in the Pennsylvania Convention Center, Room 114 Auditorium-Lecture Hall).**

Monographic Bibliographic Record Program (BIBCO).

The Policy Committee of the PCC decided that Dec. 31, 2014, will be the last date for original BIBCO cataloging using the *Anglo-American Cataloguing Rules*, 2nd edition (AACR2). Starting Jan. 1, 2015, all BIBCO contributions must follow RDA BIBCO Standard Record guidelines.

The PCC Secretariat is in the process of updating and expanding the BIBCO Participants' Manual to reflect RDA, the single cataloging instruction supported by the PCC. The revised manual will provide program information as well as guidelines on creating PCC-level records and updating BIBCO and non-BIBCO level records.

The first BIBCO funnel membership was officially established in December 2013. The BIBCO funnel membership offers an opportunity to institutions and individuals to participate collectively in the BIBCO program. It also allows those within a funnel to interact and support each other on providing better standardized access in the area of bibliographic control.

Library of Congress-Program for Cooperative Cataloging Policy Statements.

The *RDA Toolkit* release in July of 2013 contained 83 updates (new, deleted, and revised) to *the LC-PCC PSs*. Due to the closure of the federal government for 16 days in October, the planned November update of the policy statements had to be postponed—those updates will be published in the first 2014 release of the *RDA Toolkit* in February.

Undifferentiated Name Authority Records.

In December, PSD worked with COIN at the behest of the Program for Cooperative Cataloging Policy Committee to develop guidance and workflows for resolution of undifferentiated name authority records (NARs). The revised guidelines will be officially issued in the *Descriptive Cataloging Manual Z1*, Update 1, 2014 in February. However, because this topic was a highly desired outcome of several PCC Task Group recommendations, the guidelines become effective immediately. In brief, LC and PCC catalogers may no longer create new undifferentiated name records, nor may they add additional names to existing undifferentiated name authority records. Catalogers are encouraged to remove identities from existing undifferentiated NARs. If all identities represented on an undifferentiated NAR cannot be differentiated and removed, the NAR may be left as "undifferentiated," but that NAR must continue to be marked as AACR2 and may not be upgraded to RDA. In collaboration with OCLC, instructions on how to handle "the last identity standing" have been included in the guidance. The updated DCM instructions are available on the PCC web site at
http://www.loc.gov/aba/pcc/rda/PCC%20RDA%20guidelines/Z01%20008%2032%202014rfeb.pdf.

Publications. The following have been published since ALA 2013 Annual Conference: a new edition of the *Classification and Shelflisting Manual* that accommodates changes to classification and shelflisting policy in light of RDA; *Subject Headings Manual* Update #2 (dated July 2013), which also accommodates policy changes due to RDA; and the 35th edition of *Library of Congress Subject Headings*. Copies of these publications may be purchased from the Cataloging Distribution Service (www.loc.gov/cds).

The Policy and Standards Division is facilitating the migration to free downloadable PDF versions of these publications. Free versions of the 34th (2012) edition of LCSH, the *Subject Headings Manual* instruction sheets revised through September 2013, and all of the back issues of the *Cataloging Service Bulletin* have been posted to the ABA public web site, http://www.loc.gov/aba. Selected Library of Congress classification schedules have also been posted, with others to follow as supplies of printed copies are depleted. By July 1, 2014, CDS will no longer have any print publications available.

Genre/Form Terms. LC continues to partner with the Music Library Association, the American Theological Library Association, and the ALA ALCTS (Association for Library Collections and Technical Services) Subject Analysis Committee's Subcommittee on Genre/Form Implementation to develop genre/form terms in the areas of music, religion, and literature, respectively. In addition, the

Subcommittee on Genre/Form Implementation is partnering with LC to develop "general," or interdisciplinary, terms (e.g., dictionaries). It is anticipated that all of the terms under development will be added to LCGFT in 2014 and 2015, joining the previously implemented terms for moving images (films and television programs), sound recordings, cartographic resources, and law materials.

__Medium of Performance Terms.__ Since 2010 the Library of Congress and the Bibliographic Control Committee, Subject Access Subcommittee, of the Music Library Association have been collaborating to develop the *Library of Congress Medium of Performance Thesaurus for Music* (LCMPT). Proposals for the initial 802 terms have been published on a Tentative List and will be approved on Feb. 10, 2014. Further information on the project and the Tentative List may be found at http://www.loc.gov/catdir/cpso/medprf-list.html. Comments about the proposed terms, their references, and scope notes may be sent by Feb. 5, 2014 to Janis L. Young at jayo@loc.gov.

After approval, the terms will be available for searching through Classification Web. In addition, a file of MARC 21 records will be freely provided on the Acquisitions and Bibliographic Access website (http://www.loc.gov/aba) at a URL to be announced. The file will be refreshed monthly when the Tentative List for the month is approved. The vocabulary will also be made available on the Library's Authorities & Vocabularies website (http://id.loc.gov), where they can be downloaded in a variety of formats. The records will not be available in the LC ILS nor in http://authorities.loc.gov.

__Demographic Group Terms.__ As part of its ongoing effort to provide effective access to library materials, the Library of Congress has determined that it will sponsor the creation of a new vocabulary, entitled *Library of Congress Demographic Group Terms* (LCDGT). This vocabulary will be used to describe the creators of, and contributors to, resources, and also the intended audience of resources.

 Some LC subject headings – most notably the form headings for literature – include demographic information (e.g., **Children's stories, American**, in which *stories* is the form, *children* are the audience demographic, and *Americans* are the creator demographic). When the literature terms in *Library of Congress Genre/Form Terms for Library and Archival Materials* (LCGFT) are approved for use, however, the LCSH form headings will no longer be assigned to works of literature. (LCSH form headings will still be assigned to works *about* literature.) LCGFT does not include demographic terms because they do not relate to genres or forms.

To avoid losing access to vital demographic information, the LC Acquisitions and Bibliographic Access Directorate Management Team has approved the creation of LCDGT. Terms from LCDGT will be coded in MARC 21 fields 385 and 386, for audience and creator/contributor characteristics, respectively, in bibliographic records and authority records for works. The Policy and Standards Division plans to approve the initial group of terms by the end of 2014. The primary source for access to the approved terms will be *Classification Web*, and the terms will also be made freely available on LC's web site.

Machine-Readable Bibliographic Information Committee (MARBI)

Liaison Report

submitted by Cate Gerhart
University of Washington Libraries

This report provides information of interest to the OLAC constituency from the January 2014 MARC Advisory Committee (MAC) meetings in Philadelphia, Pennsylvania. If you would like to see the complete list of topics discussed, you can find them at: http://www.loc.gov/marc/mac/

The first meeting of MAC was successfully held at the Midwinter ALA meeting 2014. I continued representing OLAC at this meeting and enjoyed for the first time being able to vote on the proposals that were discussed. One new thing about the proposals and discussion papers is that they now include implications for the new Bibliographic Framework. So if you would like to start getting familiar with the terminology and look of the new format, take a look at some of the papers at the above website URL.

Proposal No. 2014-01: Defining Indicator values of Field 588 Source of Description Note in the MARC 21 Bibliographic Format

This proposal passed with some minor editorial changes. It defines the first indicator in the 588 field to allow catalogers to avoid typing in two of the most standard strings of information into this field. First indicator value 0 will provide a display constant that says "Source of description:" and first indicator value 1 will provide a display constant that says "Latest issue consulted:" If neither of the these work then you can still use "blank" for No information provided and use the phrase you want.

Proposal No. 2014-02: Making Subfield $c Repeatable in Fields X10 and X11 of the MARC 21 Bibliographic and Authority Formats.

This proposal passed as written. It will allow the $c in conference headings to be repeated so that when multiple places of an event are needed they can each go in their own subfield $c. There may need to some guidance for how to handle punctuation when using this repeatable $c.

Proposal No. 2014-03: Renaming and Redefining 347 $f (Transmission speed) in the MARC 21 Bibliographic Format

This proposal passed as written. As a result of changes in RDA, there is a request that the 347 $f be renamed from "Transmission speed" to "Encoded bitrate". The definition has also been broadened to include anything that is streamed, not just audio and video.

Discussion Paper No. 2014-DP-1: Designating Never Published in the MARC 21 Bibliographic Format

This discussion paper looked at the many ways in which the fact that something was never published could be encoded in MARC. This is needed because often a publisher announces that something will be published and thus a bibliographic record is created and even holdings are set when preordered, but in the end the title is never published. This would inform anyone seeing the record in the future that even though a title was planned, it was never published, at least not by the publisher given in that record. The three options presented in the paper were: 1) a value in the Encoding level (Leader position 17), a code in the 008/06, Type of date/Publication status, and lastly some kind of indication in the 263 "Projected Publication Date". A proposal will be forthcoming, probably at ALA Annual.

Discussion Paper No. 2014 DP-02: Relationships Between Subject Headings from Different Thesauri in the MARC 21 Authority formats

This discussion paper from the German National Library looks at ways that the MARC Authority Format could provide to indicate relationships between terms from various thesauri. The suggested way to enable this would use either the $i or $4 in a 7XX field. There was general agreement that this would be a worthwhile thing to be able to do so a proposal will appear in the future.

Discussion Paper No. 2014 DP-03: "Miscellaneous information" in Topical Term and Geographic Name Fields of the MARC 21 Bibliographic and Authority Formats

This discussion paper also came from the German National Library. It looks at the possibility of adding a subfield to headings that are qualified in some way, often because there are homonyms (for instance, the term "Canon" is qualified by Art, Literature, and Musical form, depending on the meaning). While it was agreed that the US community would probably not use this, it is clear that the Germans would like to, so there will be some solution found that they can use as they see fit.

Discussion Paper No. 2014 DP-04: Recording RDA Relationship Designators in the MARC 21 Bibliographic and Authority Formats

Lastly, this discussion paper starts to address the ongoing problem of the inability of some of the relationship designators to be understood by the general public. There is a need for more "user-friendly" terms to assist users, while at the same time, not losing any of the granularity that RDA rules supports. There were a number options discussed, but because the JSC is going to be discussing this issue in the near future, it was thought that waiting to see the results of that discussion is the best way to proceed.

Semi-annual report of The Subcommittee on Maintenance for CAPC Resources

submitted by Richard N. Leigh

Delivered electronically to Mary Huismann, Chair of CAPC
To be read at the CAPC meeting at ALA Midwinter 2014, on 2014-01-24

The Subcommittee on Maintenance for CAPC Resources (a.k.a. SMaCR) is charged with "identifying those CAPC resources that need ongoing maintenance, determining how often and who will update them, and examining the structure of the CAPC web pages and making recommendations for reorganization (in collaboration with Teressa Keenan, OLAC Webmistress)." (http://www.olacinc.org/drupal/?q=node/37)

SMaCR delivers an annual report to CAPC, usually at ALA Midwinter. SMaCR's General Operating Procedures (http://olacinc.org/drupal/capc_files/SMaCR%20General%20Operating%20Procedures.pdf) specify that this report should contain: What's been tagged for review; What's actually been reviewed; What's been updated; and What's been archived.

11 resources are currently under review. Reviews will also begin for 4 resources in the first half of 2014. CAPC Resources are reviewed at least once every 5 years.

One resource was substantially updated in the second half of 2013 (Video Language Coding: Best Practices).

No task forces were added to the list of Active Task Forces & Subcommittees in the second half of 2013.

No task forces were moved to the list of Past Task Forces & Subcommittees in the second half of 2013.

No additions were made to the Cataloging Tools and Training Documents & Reports and Thought Papers section in the second half of 2013.

No additions were made to the Reports and Thought Papers section in the second half of 2013.

No additions were made to the Archived Publications and Training Materials section in the second half of 2013. Resource creators are always consulted before their resources are archived.

SMaCR keeps a spreadsheet with information about the content and organization of the CAPC section of the OLAC website. That spreadsheet has been updated to reflect changes to the CAPC website that were made in 2013. Future lists of requested changes will be sent to OLAC Webmistress Teressa Keenan, with the Chair of CAPC being copied.

The first six months of 2014 look to be a busy time for SMaCR. Management of the 15 reviews will be split between SMaCR's five members (John Baga, Cyrus Z. Ford, Richard N. Leigh, Elizabeth A. Morgan, Heather Pretty). The necessary reviews & upkeep of the website will be divided between all 5 SMaCR members.

NEWS AND ANNOUNCEMENTS

T.J. Kao, Column Editor

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OLAC Movie & Video Credit Annotation Experiment – Call for Participation

Your help is needed to make it easier to find videos in libraries. Could you spare a few minutes each week to help OLAC make it easier for your patrons to find videos in libraries? Why not go to http://olac-annotator.org/ when you have a moment free and annotate a handful of credits? The OLAC Movie & Video Credit Annotation Experiment is part of a larger project to improve access to videos in libraries. Currently, we're trying to teach a computer to parse the credits (statements of responsibility and similar information) in MARC records for movies. In order to do this, we need a pool of correct answers.

If you are willing to help translate credits into English from other languages, please email Kelley McGrath at kelleym@uoregon.edu. Help is especially needed with Indonesian, Korean, Polish, Thai, Turkish and Urdu. If you're interested in the movie credit annotation experiment, please join our discussion list at https://lists.uoregon.edu/mailman/listinfo/olac-credits.

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OLAC-MOUG Liaison – Call for Candidates

OLAC and MOUG are seeking a new liaison. To be eligible, the liaison is required to be a member of both OLAC and MOUG, to attend meetings of both organizations, and to provide reports to both organizations. Liaisons serve two-year terms that may be renewable. Appointment will be made jointly by the OLAC and MOUG Executive Boards.

If you have any questions or are interested, please contact Mary Huismann at huism002@umn.edu.

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Tentative List of LCMPT Terms

Since 2010, the Library of Congress and the Bibliographic Control Committee, Subject Access Subcommittee, of the Music Library Association have been collaborating to develop the Library of Congress Medium of Performance Thesaurus for Music (LCMPT). Proposals for the initial 802 terms are now available on a Tentative List and which was approved on February 10, 2014.

The tentative List and background information on the project are available on the Library of Congress' web site at http://www.loc.gov/catdir/cpso/medprf-list.html.

Comments about the proposed terms, their references, and scope notes may be sent to Janis L. Young at jayo@loc.gov.

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10th Annual Taxonomy Boot Camp 2014, November 4-5, in Washington, D.C. – Call for Speakers

Taxonomy Boot Camp brings together practitioners and experts in taxonomy, vendors who have created tools to help manage your taxonomies, and novices who are starting out in the world of information management. Two parallel tracks on the first day provide those new to the field with the nuts and bolts they need to get up to speed, and expert practitioners with insights into how other professionals have made their organizations more successful through better use of taxonomies. On the second day of the Boot Camp, everyone shares in case studies, practical sessions on taxonomy tools and their use, and cutting edge developments in the field. Don't miss this unique opportunity to learn about tools and techniques you can use to bring your information clouds together, and meet the people who can help you be successful in your efforts.

The 10th annual Taxonomy Boot Camp will be held again in Washington DC from November 4-5 as part of KMWorld. The call for speakers is now open, deadline for proposals is **March 20**. Proposals for individual sessions, panels and workshops are all welcome, covering any aspect of taxonomy/ontology/vocabulary design, management, integration and use. See full details at http://www.taxonomybootcamp.com/2014/, or submit your proposal online at http://www.taxonomybootcamp.com/2014/CallForSpeakers.aspx.

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California Library Association Technical Services Award of Achievement – Call for Nominations

Do you know a stellar technical services librarian who is a CLA member? Here's your opportunity to acknowledge their great work! Nominate a California technical services librarian for the Technical Services Award of Achievement. Don't let the deadline pass you by -- Nominate your outstanding colleague today!

Application deadline: **March 28, 2014**

Details about this award: http://www.cla-net.org/displaycommon.cfm?an=1&subarticlenbr=303
Submission form: https://m360.cla-net.org/admin/forms/ViewForm.aspx?id=53203

If you have any questions, please contact Mary Cohen at mcohen@pvld.org.

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DC-2014 International Conference and Annual Meeting of DCMI, 8-11 October 2014, at University of Texas at Austin – Calls for Participation

The theme of the forthcoming DC-2014 Conference is "Metadata intersections: bridging the archipelago of cultural memory." Metadata is fundamental in enabling ubiquitous access to cultural and scientific resources through galleries, libraries, archives and museums (GLAM). While fundamental, GLAM traditions in documentation and organization lead to significant differences in both their languages of description and domain practices. And yet, the push is on for "radically open cultural heritage data" that bridges these differences as well as those across the humanities and the sciences. DC-2014 will explore the role of metadata in spanning the archipelago of siloed cultural memory in an emerging context of linked access to data repositories as well as repositories of cultural artifacts. Submissions of papers, reports, and posters are welcome in all areas of innovative metadata design and best practices.

IMPORTANT DATES:

Peer-Reviewed Papers, Project Reports & Posters:

— Submission Deadline: **April 3, 2014**

— Author Notification: July 12, 2014

— Final Copy: August 16, 2014

Special & Panel Sessions, Workshops:

— Submission Deadline: **April 3, 2014**

— Author Notification: June 1, 2014

Best Practice Posters & Demonstrations

— Submission Deadline: June 2, 2014

— Author Notification: June 30, 2014

(All deadlines: Midnight, Pacific Standard Time)

More information is available at: http://purl.org/dcevents/dc-2014/cfp.

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RDA Special Formats Workshop, Apr. 11, in Fresno – Save the Date

California Library Association's (CLA) Technical Services Interest Group is presenting a workshop on cataloging the special formats using RDA and MARC 21. The presenters, Jay Weitz, Senior Consulting Database Specialist from OCLC, and Julie Rene Moore, the Head of Cataloging from CSU Fresno, will focus on the RDA description of special formats, including videorecordings, sound recordings, 3-D objects, and more.

Registration closes Friday, **April 4**, at 5:00pm PST. For more information, please check the CLA's "Spring fling" continuing education event website at:

http://www.cla-net.org/displaycommon.cfm?an=1&subarticlenbr=723.

If you have any questions, please contact Julie Renee Moore at julie_moore@csufresno.edu.

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2014 Annual Conference of NETSL, Apr. 11, at College of Holy Cross – Save the Date

The New England Technical Services Librarians (NETSL) 2014 Annual Spring Conference themed "Coming up roses – growing towards the future!" will be held at College of Holy Cross in Worcester, Massachusetts, on April 11, 2014. Watch out for more information at http://netsl.wordpress.com/.

If you have any questions, suggestion, or other feedback, please contact Christine Pesch Richardson at christine.pesch@yale.edu.

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**2014 OLC Technical Services Retreat (was "The Mohican Retreat"), Apr. 21-22, in Columbus, Ohio –
Save the Date**

The 2014 Ohio Library Council (OLC) Technical Services Retreat themed "Reach, discover, act!" will be
held between April 21-22 at the NorthPointe Hotel and Conference Center near Columbus. In the past,
this popular event has been attended by technical services professionals from multiple states and
features outstanding networking opportunities. Come to the retreat, learn from experts, network with
colleagues, and take part in a fun evening event. Stay tuned to the OLC website
(http://olc.org/prof_dev_TechServRetreat.asp) for more information on this event formerly known as
The Mohican Retreat.

If you have questions regarding this event, please contact Connie Strait at CStrait@gcpl.lib.oh.us.

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29th NASIG Conference, May 1-4, in Fort Worth, Texas – Save the Date

The North America Serials Interest Group (NASIG) will be holding its 29th annual conference themed
"Taking stock and taming new frontiers" at Hilton Fort Worth, Texas, between May 1st and 4th.

In addition, four pre-conferences take place on April 30th and May 1st.

Full program schedule: http://nasig2014.sched.org/

Registration:
http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=700&pk_association_webpage=1
260

Room reservation at conference rate:
http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=700&pk_association_webpage=1
234

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IN THE SPOTLIGHT…

with Bobby Bothmann

Bojana Skarich, Column Editor

Bobby Bothmann is a mover and a shaker in the library field. Between working on OCLC Batch Reclamation projects, acting as project coordinator for implementation of a new library catalog discovery layer, incorporating emerging technologies into his role in the library, writing books on cataloging special formats, being active in organizing conferences, and supervising staff, he's got a lot of plates spinning in the air. How does he do it all? Working as the Metadata & Emerging Technologies Librarian at Minnesota State University, Mankato, Bobby remarks that what helps him respond to challenges at work is to "research, read, and find training." This knowledge-gathering approach helped Bobby to carefully consider the role of emerging technologies in libraries, and how they might help meet the needs of his library. In times of sweeping change facing library cataloging departments, it helps to be well-prepared for the future.

Bobby first became involved in OLAC in 2000. Bernie Karon, his mentor and supervisor at the University of Minnesota, taught him special formats cataloging and suggested he attend the 2000 OLAC conference in Seattle. "I learned so much at that conference and met so many wonderful, supportive people that I was hooked and dove feet first into co-chairing the next conference," Bobby says. He says that organizing the OLAC conference in St. Paul, Minnesota as a young librarian in 2002 was one of his most important career achievements. After that, Bobby became active in OLAC by serving as a treasurer, membership coordinator, and later vice president. In addition, he has been the webmaster for the 2004 OLAC conference, has served on planning committees for the 2006 and 2012 conferences, and has presented workshops at the last three conferences. Chances are, if you've ever been to an OLAC conference, you've run into Bobby's smiling face. I really enjoyed meeting him at the 2012 conference in Albuquerque, and was pleasantly surprised at how welcoming and friendly the OLAC board was, especially to newbie librarians like me.

How did Bobby get a start in librarianship? He learned all about librarianship when he was a young kid, as his mom was a volunteer at his school library. After that, he worked in the library in high school and also when he was attending university. "My first job there was filing cards in the catalog, which was horrible, particularly as they had just added a computerized catalog and I was instantly in love with being able to find books by typing a few words on the screen!" he says. Yes, he was adoptive of those

emerging technologies early on. He was trained in copy cataloging at that job, and while pursuing a geology degree, Bobby was struck at how similar cataloging was to rock description taxonomy. He enjoyed cataloging from the start, and decided to switch gears and pursue a career in library science. Bobby's passion for cataloging has translated into coauthoring a book, *Cataloging of Audiovisual Materials and Other Special Materials: A Manual Based on AACR2 and MARC 21.* He says that it was "a rare and amazing learning opportunity" to work with Nancy B. Olson and to be able to "re-write the continuing and electronic resources chapters and add a Star Trek example to the book, to boot!"

When asked if he has any advice for new librarians, Bobby says get involved and to try new things out. "Say YES, whatever it is. Everything that I have learned best and become expert at has been something that I didn't know very much about when I said yes. People will help you if you ask them, and studying that topic so that you can speak or act knowledgeably about it is one of the best ways to learn." This has been so true for me as well. I find that enthusiasm, intellectual curiosity and a willingness to take risks can serve you well as you grow in your library career. For Bobby, that meant diving right in and organizing a conference. It turned out to be a great thing for all involved.

REVIEWS

Christina Hennessey, Column Editor

Catalogue 2.0: The Future of the Library Catalogue
Edited by Sally Chambers

"The idea behind *Catalogue 2.0,*" according to editor Sally Chambers, "is to provide an overview of the current state of the art of the library catalogue and then look to the future to see what the library catalogue might become." She successfully recruited a panel of international experts representing several different areas of interest and perspectives on the evolving nature of the library online public access catalog (OPAC). The contributing authors have addressed a wide variety of issues, including practical projects and theoretical concepts covering both the technical and public aspects of library catalog functionality and presentation.

Sally Chambers began working in academic libraries in the mid-1990's. In 2001 she turned her focus to digital libraries. She coordinated a forerunner of Enquire, a digital enquiry service for UK public libraries and led the development of an online library for distance learning students at the University of London. She then joined The European Library, and is now the Secretary General of the Digital Research Infrastructure for the Arts and Humanities DARIAH) where she combines her interests in digital humanities with her focus on interoperability, metadata and technical project coordination. With these credentials, it's not surprising that she has done a superb job of interconnecting each of the essays into a unified and interesting narrative describing the current and future shape of the library catalog.

The first two chapters begin the discussion by looking at the catalog from the user's point of view. In "Next-Generation Catalogues: What Do Users Think?" (Chapter 1), Anne Christensen provides an historical synopsis of usability studies conducted by libraries since the 1980's. Christensen points out that "Google-like" functionality, keyword searching, and the use of facets to narrow down results is expected by users; and likeability of the catalog is as important as usability. Chapter 2, "Making Search Work for the Library User" by Till Kinstler, focuses on search engine functionality. He provides an historical overview of the evolution of the catalog and then explores the ways in which the catalog can be used in the background to improve the user's library experience. He describes the limitations of the traditional Boolean-based searching and suggests that adding popularity, freshness, and availability parameters to the relevance ranking of terms in a vector model of searching might lead to even better catalog functionality.

Marshall Breeding, in, "Next-Generation Discovery: An Overview for the European Scene" (chapter 3), provides a summary of the current options available to libraries wishing to implement a next-generation catalog. Beginning with some background on the common features of next-generation catalogs, he continues with an account of some of the individual discovery services currently being used in Europe. Both commercial and open source products are included. Descriptions of individual institutional implementations are used to illustrate functionality of each of the products.

In their chapter "The Mobile Library Catalogue" (chapter 4), Lukas Koster and Driek Heesakkers introduce the reader to a range of factors that need to be considered when combining library services with mobile technology. After a brief description of the different mobile devices available, web and native applications, required platforms, and functionality of mobile services, the authors share their case study of the implementation of "UBA Mobile," a mobile app to connect users with the University of Amsterdam's catalog. They complete the chapter by offering a checklist of considerations for use when thinking about creating mobile services.

"FRBRizing Your Catalogue: The Facts of FRBR" (chapter 5) is written by Rosemie Callewaert. She describes how the FRBR model has been applied in the implementation of zoeken.bibliotheek.be, the Union Catalogue of public libraries in Belgium. After explaining how the interface works, Callewaert provides a more philosophical examination of the relationship between FRBR library catalogs, including metadata creation and enrichment, relevance ranking, search interfaces, and end-user services.

In chapter 6, "Enabling Your Catalogue for the Semantic Web," Emmanuelle Bermés introduces the idea that it is time for libraries to free their bibliographic data and make it open, available and reusable as part of the global 'Web of Data.' Before exploring some of the key issues that librarians need to consider when embarking on a linked data project, Bermés provides an introduction to the semantic web and linked data.

The growth of digital scholarship is vastly influencing the way in which libraries are delivering services to their communities. In her chapter Supporting Digital Scholarship: Bibliographic Control, Library Co-operative and Open Access Repositories" (chapter 7), Karen Calhoun reflects on recent changes in user expectations and how a preference for online content is influencing library services. She discusses the role of metadata and bibliographic control in providing access to material and questions how the library catalog fits into this "web-based world."

The book concludes with an essay by Lorcan Dempsey, "Thirteen Ways of Looking at Libraries, Discovery, and the Catalogue: Scale, Workflow, Attention" (chapter 8). Dempsey describes two contexts, which he calls "attention switch" and "workflow switch." He explains that library catalogs were born in an age when information resources were limited and attention was abundant. At that time users built their workflows around the library. Now, according to Dempsey, users live in a world where information resources are plentiful and attention is limited. In this new world users expect services to be built around their individual workflows. He concludes the future of library services is dependent on a transition to the "network level" and a focus on personal user needs.

Catalogue 2.0 paints a comprehensive and accurate picture of the current state of library catalogs and discovery interfaces; and predicts a positive future for metadata and library services. It is well written and applicable to a wide audience. Library administrators and management, reference librarians, catalogers and metadata specialists, as well as programmers and technologists will all find the information presented in *Catalogue 2.0* to be relevant to their professional responsibilities.

Reviewed by:

Teressa M. Keenan
Head, Bibliographic Management Services
University of Montana

OLAC CATALOGER'S JUDGEMENT:

QUESTIONS AND ANSWERS

Compiled by Jay Weitz

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Correction: Dating Ourselves

(From *OLAC Newsletter Volume 33, Number 4, December 2013*)

At the Enhance Sharing Session at ALA Midwinter in Philadelphia, 2014 January 24, my answer to the "Dating Ourselves" Q&A that appeared in the *OLAC Newsletter* 33:4, December 2013, was itself called into question. The correct answer is that under RDA 2.8.6.6 and its LC-PCC PS, a date of publication (264/1) that is inferred from a date that appears in the resource (such as a copyright date) should be bracketed but should *not* be followed by a question mark. A question mark should be included only when the inferred date of publication is taken from outside the resource. Please forgive me for spreading my own confusion.

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From Scatology to Poetry (Please Excuse Our Middle English)

Question: Could you advise me on the use of subfield $t in an enhanced 505? If I am supplying a corrected form of a song title in square brackets (using "i.e." in AACR2), should I repeat subfield $t immediately before the corrected form of the song title? Here is my real-life example, from the new Eminem album (with my assurance that there is no hidden meaning here):

$t ***hole [i.e., $t Asshole]

Is that how you would code it? Title access to "asshole" would be desirable, in my opinion, but you know what opinions are like.

Answer: My inclination is to say that the corrected title shouldn't be separately subfielded. In this particular case, the word appears to be the entire title, but we wouldn't think of supplying similar subfielding in field 505 in the case of a "corrected" word that was merely one word of a longer title, nor of giving access to the corrected form of the full title in field 505. At least in the way that WorldCat currently indexes enhanced 505s, you have access to the corrected word just as it is in the Notes (nt:), Keyword (kw:), and the Title (ti:) indexes. In fact, in WorldCat the full word is accessible in both the

Notes (nt:) and Keyword (kw:) indexes -- although NOT in the Title (ti:) index -- even if the entire contents note is in subfield $a (that is, not an enhanced contents note). (Obviously, I can't speak for local system indexing.) Actually, thanks to the strategically-placed asterisks, the uncensored word seems easier to find than the censored word. How's that for poetic justice?

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<p align="center">Punctuation By Example</p>

Question: In RDA records 700 MARC tags, I have seen:

> Janssen, Famke, $d1964-, $e actor.

where there is a comma after the date (before the relator term). I have also seen:

> Janssen, Famke, $d1964- $e actor.

where there is no comma after the date (before the relator term). Just to be thorough, is there a period followed by a comma after the date, when there is a birth and death date?

> Jackson, Michael, $d1958-2009., $e performer.

My hunch is that there should be a comma, because that allows for all of the separate terms to be delimited (parsed?). Is that right?

Answer: RDA doesn't offer much in the way of direct guidance on your question, so we have to resort to punctuation by example, if you will. The AACR2 warning about examples being "illustrative and not prescriptive" (AACR2 0.14) is reworded in RDA 0.10 as follows: "The examples in RDA illustrate the application of the specific instruction at which they appear. They illustrate only the data that are addressed by that instruction." RDA 0.10, however, does go on to say: "Examples illustrating the construction of authorized and variant access points use the punctuation specified in AACR2 (see appendix E)." It does not explicitly mention Relationship Designators for personal, family, or corporate names themselves, but the next paragraph says, in part: "When using an authorized access point or structured description to record a relationship to a related work, expression, manifestation, or item, the examples illustrate the use of relationship designators." So it does not seem unreasonable to extrapolate the taking of examples for name authorized access points that include Relationship Designators as somewhat authoritative, as well. We can find such examples of personal and corporate names with Relationship Designators scattered around and from them we can derive some fairly consistent patterns:

> LC-PCC PS 1.7.1 (Access Points in Name Authority and Bibliographic Records (General) 2.b):
>
> > 100 1   Smith, John, $d 1924- $e author.
> >
> > 700 1   Brett, Jan, $d 1949- $e illustrator.

700 1   Hitchcock, Alfred, $d 1899-1980, $e director, $e producer.

710 2   Raymond Foye Editions, $e donor. $5 DLC

Best Practices for Music Cataloging Using RDA and MARC21, Draft
(http://bcc.musiclibraryassoc.org/BCC-
Historical/BCC2013/RDA_Best_Practices_for_Music_Cataloging.pdf):

RDA Chapter 18:

100 1   Alvin, Dave, $e composer, $e performer.

710 2   Bossa Jazz Trio, $e instrumentalist.

710 2   Stanford University. $b Chamber Chorale, $e singer.

100 1   Ewazen, Eric, $d 1954- $e composer.

700 1   Huth, Peter $c (Music editor), $e editor.

700 1   Ryerson, Edward L. $q (Edward Larned), $d 1886-1971, $e former owner,
$e dedicatee.

RDA Chapter 19:

100 1   Chandler, Matt, $d 1974- $e author.

    …

700 1   Wilson, Jared C., $d 1975- $e author.

100 1   Helvacioğlu, Erdem, ‡d 1975- $e composer, $e performer.

    …

700 1   Mertin, Ulrich, $e composer, $e performer.

RDA Chapter 20:

700 1   Dohnányi, Christoph von, $e conductor.

710 2   Philharmonia Orchestra (London, England), $e performer.

700 1   Alder, Steve, $e performer.

700 1   Keyes, Julie, $e performer.

700 1   Bestor, Kurt, $e arranger of music.

RDA Chapter 25:

100 1   Carpenter, John Alden, $d 1876-1951, $e composer.

100 1   Corner, Philip, $e composer.

"PCC Guidelines for the Application of Relationship Designators in Bibliographic Records" (http://www.loc.gov/aba/pcc/rda/PCC%20RDA%20guidelines/Relat-Desig-Guidelines.docx):

100 1   Agunias, Dovelyn Rannveig, $e author.

700 1   Newland, Kathleen, $e author.

100 1   Hull, William, $d 1753–1825, $e defendant.

100 1   Stone, Melicent, $e author, $e illustrator.

100 1   Shore, David A., $e author.

700 1   Shore, David A., $e former owner. $5 DNLM

Generally, the pattern seems to be to supply a comma (or to substitute a comma for a period that is already present) in most cases. *Exception:* When the final element of the name is an abbreviation that is not contained within parentheses, retain the period and follow it with a comma. *Exception:* Do not supply a comma in the case of an open date that ends with a hyphen.

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The Digital Divide

Question: Could you confirm this interpretation of the 008 coding for plain old DVD videos (not enhanced DVDs)? When I read the definition of value "q" in the Visual Materials "Form" fixed field (VIS 008/29), I'm thinking that DVDs fit:

Direct electronic: Storage on a directly accessible tangible recording medium, e.g. disc, tape, playaway device, flashdrive, portable hard drive, etc. If a distinction between types of electronic resources is not necessary, code "s" can be used as a generic code for any form of electronic resource.

The "D" in DVD is "digital," so then is "q" appropriate?

Answer: Back when audio compact discs and video DVDs were first made commercially available, in 1982 and 1996/1997, respectively, it was decided to treat them as simply the next generations of their particular audio and video recording media, rather than to consider them "digital" media, the reality of

the situation notwithstanding. So we have traditionally not coded either as electronic media in the Form fixed field.

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006 and 007 Never Warm but Occasionally Fuzzy

Question: A cataloging assistant the other day asked me whether he was supposed to make field 006 or field 007 for a CD accompanying a book (or a score -- same issue either way). We checked *Bibliographic Formats and Standards* and found that both fields are said to be appropriate for characteristics of accompanying material. Since they don't give the same information, and in that particular case there was a good deal of information to give, we decided to give both on that record. Now I'm checking a score with an accompanying CD. This will be new input, so I want to get it right. Which field should be used? Or should both be used? In the past we customarily added 006 fields to such records, though I don't know why. When I think about how our ILS works, though, the 007 would actually work better, because that is used to limit to CDs (or other formats), whereas the 006 is pretty much ignored by our particular system. Any words of wisdom?

Answer: For accompanying material, especially for accompanying material of some significance, both 006 and 007 are appropriate when applicable. In MARC 21, they serve somewhat different purposes, as you well know: 006 is an extension of the Leader/008 data; 007 is a coded version of physical attributes. In WorldCat, they each contribute various elements to the assignment of Material Types and hence, to indexing. You can see the contribution of each element in Searching WorldCat Indexes, "Format and Material Type Values Indexed" (http://www.oclc.org/support/services/worldcat/documentation/searching/searchworldcatindexes.en.html#search_worldcat_materialtypes.fm). As you note, your local system will treat things differently. When accompanying material is substantive and/or there is some reasonable uncertainty over which is the main resource and which is the accompanying resource, I'd say that field 006 should be used for the resource chosen as accompanying. Field 007 would also be good in such instances. In cases where the accompanying material is less important, the 006 and 007 fields are correspondingly less important. That's pretty fuzzy, but I hope it helps.

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RDA Shortcuts

Question: I feel really dumb about this, but I have been continuing to actually type in each of those new RDA 33X fields. I've been to several workshops where they say that you should just call up some template or macro or whatever and it will plop them in for you. What are they talking about? Are they talking about constant data? (I do know how to do that, and even that would be more efficient than what I have been doing, typing each field in.)

Answer: If you are creating an RDA record from scratch, you can set your options to give you RDA workforms. Go up to Tools/Options/RDA and check "Use RDA workforms when creating new bibliographic records" and/or the corresponding box for new authority records. If you're working with existing records and want to add 33X fields to them, go up to Tools/Macros/Manage and then click on the plus sign to the left of the OCLC line. The "Add33x" macro can be run from there or you can assign it to one of the "User Tools" buttons that you can add to your toolbar. Go up to Tools/User Tools/Assign, click on "Macro" at the top and you'll see the Macro "OCLC!Add33x" to assign it to an unused Tool number. You can also create Text Strings (Tools/Text Strings) or Constant Data (Edit/Constant Data) if you want to create more specific 33X defaults or defaults for other RDA fields (34X, 38X, etc.) that you commonly use.

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A Sad Truth About Language

Question: Is it possible to a search on original language alone in WorldCat or is it always mixed with other types of languages?

Answer: Sadly, there is no way to limit a search to original language alone. In fact, field 041 subfield $h (Language code of original) is not even indexed in WorldCat. This is, at least in part, a legacy of the extremely complex history of field 041. You can get a sense of that complexity by looking at the Content Designator History of field 041 in MARC 21 Bibliographic (http://www.loc.gov/marc/bibliographic/bd041.html). Until 1980, when subfield $h was first defined, the second Language Code in a subfield $a string represented the original language. From 1980 until 2011, subfield $h also included the languages of intermediate translations as well as original languages. In 2011, subfield $k was defined exclusively for intermediate translation languages and subfields $m and $n were defined for original languages of accompanying materials and of librettos, respectively. In other words, until 2011 there was no single subfield or set of subfields exclusively coded for the original language of a resource. Hard to believe, but true. By the way, "Searching WorldCat Indexes" (http://www.oclc.org/support/services/worldcat/documentation/searching/searchworldcatindexes.en.html) outlines all available indexes both by the index and by the MARC 21 element.

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Making Access a Big Production

Question: Is the producer of a record a required field? Many catalogers enter this information; many do not.

Answer: Required? No. Permissible? Certainly. A good idea? A matter of cataloger's judgment. There are many record producers past and present (George Martin, Phil Spector, Don Kirshner, Rick Rubin, Timbaland, to name only a few) who are as prominent as many of the musicians they produce. If you think your users will be interested in access to the name of a record producer, by all means include them in a bibliographic record. Field 508 is the most logical place. RDA Appendix I.2.2 includes the Relationship Designator "producer" for just such access as part of an Authorized Access Point. The RD "producer" is defined as: "A person, family, or corporate body responsible for most of the business aspects of a production for screen, audio recording, television, webcast, etc. The producer is generally responsible for fund raising, managing the production, hiring key personnel, arranging for distributors, etc."

NEWS FROM OCLC

Compiled by Jay Weitz

<u>**Cataloging and Metadata**</u>

Pilot Project for Merging Duplicate Records in WorldCat

OCLC has begun working with a few selected institutions on a pilot to explore extending the capability to merge duplicate bibliographic records to member libraries. The pilot will continue through the end of May as both the institutions and OCLC explore the feasibility of this extension to the Enhance Program and the Expert Community.

Updating *Bibliographic Formats and Standards*

The updating of *Bibliographic Formats and Standards* to incorporate the OCLC-MARC Updates from Technical Bulletins 261 and 262 has been completed. The larger project of thoroughly updating BFAS to incorporate RDA examples and practices will continue for many months. Fields that have been revised now have a "Last Revised" note at the bottom. Thanks for your patience during this massive project.

Connexion Client 2.5 is Released

Connexion client version 2.50 is now available for download at http://psw.oclc.org/software.htm. You will be required to upgrade to version 2.50 by 2014 March 31. An upgrade warning message will begin appearing when you start version 2.40 beginning in early February 2014. View the upgrade instructions (http://www.oclc.org/content/dam/support/connexion/documentation/client/gettingstarted/gettingstarted/gettingstarted.pdf#page=32) before installing version 2.50. To install the client on Windows XP, an account with administrative rights is required. To help prevent installation problems with Windows Vista, 7, and 8, right-click the file you downloaded and click Run as Administrator. Version 2.50 includes the following enhancements:

- Armenian, Ethiopic, and Syriac scripts are now supported.
- New RDA authority workforms for Family and Name Title have been implemented.
- New authority indexes Cataloging Source, Descriptive Conventions, Keyword, and Notes available for searching via the Keyword/Numeric Search drop down lists; these were previously available only via command line searching.
- GenerateAuthorityRecord macro updated to fully recognize the 264 field.
- GenerateERecord macro updated to better handle Unicode characters.
- Help, Useful Web Links list updated to link to OCLC-MARC Records documentation.

Enhancements to WorldCat Knowledge Base, December 2013

On 2013 December 28, OCLC released a number of enhancements to the WorldCat knowledge base. Release notes are available at http://www.oclc.org/content/dam/support/release-notes/knowledge-

base/releases/kb_release_notes_2013-12-28.pdf and include details on new features, enhancements, bug fixes, and known issues. Highlights for this quarterly release include:

- Addition of a collection level history.
- Inclusion of coverage dates from year 1450 forward.
- Improvements to the WorldShare user interface.

WorldCat Metadata API Powers Enhancements in Latest MarcEdit Release

MarcEdit, the popular free library metadata software suite, includes new functionality that will give OCLC member libraries the ability to contribute and enhance their bibliographic and holdings data within WorldCat while using MarcEdit. The new functionality will provide catalogers with a new way to interact with their OCLC data, as well as provide another option for libraries looking to streamline their metadata workflows. The new functionality in MarcEdit is made possible by leveraging the WorldCat Metadata API, one of the many APIs (Application Programming Interfaces) being made available from OCLC through the WorldShare Platform. In addition to the new functionality being made available in MarcEdit, Mr. Reese has released the source code used to interact with a variety of OCLC WorldShare Platform Services. The code library, written in C#, is available via github at: https://github.com/reeset/oclc_api, and includes support for OCLC's Metadata API, Search API, Classify web services, and FAST web services. API-eligible libraries that also use MarcEdit will now be able to upload new records to WorldCat or create new WorldCat-derived records through MarcEdit. In addition, libraries can now update WorldCat holdings, with options to add or delete holdings in batch. In order to utilize the new features in MarcEdit, libraries will need to request a Web Services Key (WSKey) that supports both the WorldCat Metadata API and the WorldCat Search API. The WSKey enables OCLC to authenticate users and activity so libraries can be confident about updating their data through third party or locally-built applications. WSKeys can be requested through OCLC's Service Configuration (https://www.worldcat.org/config/) and used across applications. If institutions already have a WSkey for the WorldCat Metadata API and WorldCat Search API, they can put the new functionality in MarcEdit to use immediately. MarcEdit also uses two additional OCLC Web Services, notably the FAST service to generate subject headings and Classify, to provide classification recommendations based on a control number. OCLC Libraries that use MarcEdit are encouraged to go to OCLC Service Configuration and request a WSKey for the WorldCat Metadata API. Then, simply plug it into the preferences area in the latest version (5.9) of MarcEdit. More information related specifically to MarcEdit's integration with the WorldCat Metadata APIs can be found at "MarcEdit and the OCLC Metadata API: Introduction" at http://blog.reeset.net/archives/1245.

Content Providers Improve Workflows for Electronic Content

OCLC has finalized agreements with 17 publishers around the world to add valuable electronic collections to the WorldCat database. Incorporating bibliographic data that link to these collections into WorldCat and the WorldCat knowledge base will reduce the cost of managing these resources and provide immediate access for libraries that subscribe to or want to purchase these collections. The following new agreements with leading content providers have recently been signed and their collections will be added to WorldCat over the next few months:

- American Mathematical Society (http://www.ams.org/home/page) based in Providence, Rhode Island, USA, with its 30,000 members, is dedicated to furthering mathematical research and scholarship. The AMS provides programs and services that promote mathematical research and its uses, strengthen mathematical education, and foster awareness and appreciation of mathematics. The American Mathematical Society is one of the premier publishers of advanced mathematics worldwide and will be providing OCLC with books and journal content.
- American Society for Microbiology (http://www.asm.org/) based in Washington, D.C., USA, is the largest single life science society, with more than 39,000 scientists and health professionals. Its mission is to advance the microbiological sciences for the improvement of health and environmental and economic well-being worldwide. American Society for Microbiology will be providing OCLC with journal and book content.
- CRC Press (http://www.crcpress.com/) based in Boca Raton, Florida, USA, is a global publisher of scientific, technical, and medical content. CRC Press publishes reference works, handbooks, and textbooks, as well as the award-winning CRCnetBASE e-book collections. CRC Press is a member of Taylor & Francis Group, an Informa business.
- CSIRO Publishing (http://csiro.au/en/Portals/Publications.aspx) based in Collingwood, Victoria, Australia, operates as an independent science and technology publisher with a global reputation for quality products and services. The publishing program covers a wide range of scientific disciplines, including agriculture, the plant and animal sciences, and environmental management. CSIRO Publishing will be providing OCLC with their books and journals.
- Digitalia (https://www.digitaliapublishing.com/) based in New York, New York, USA, is the premier Hispanic database of e-books and e-journals with the broadest access to high-quality content in Spanish Language. Thousands of e-books from the most renowned Spanish and Latin American publishing houses, as well as relevant journals that cover all topics of interest are included in Digitalia. Digitalia is a global leader providing selected titles and bringing to libraries qualitative content driven by information technology and the best practices in content management.
- The Institute for Operations Research and the Management Sciences (INFORMS) (https://www.informs.org/Find-Research-Publications/Journals) based in Catonsville, Maryland, USA, is the largest society in the world for professionals in the field of operations research (O.R.), management science, and analytics, publishing 13 scholarly journals that describe the latest O.R. and analytics methods and applications.
- JSTOR (http://about.jstor.org/) based in New York, New York, USA, is part of ITHAKA, a not-for-profit organization that also includes Ithaka S+R and Portico. JSTOR helps people discover and use a wide range of content on their research platform and preserves this content for future generations. OCLC will create and distribute bibliographic records for JSTOR's digital library of more than 1,500 academic journals, books, and primary sources.
- Knowledge Unlatched (http://www.knowledgeunlatched.org/) is a collaborative, not-for-profit initiative based in London, UK. By working with libraries, publishers, researcher funders, and foundations, Knowledge Unlatched seeks to make scholarly books freely available to readers on an open access license, while retaining the best aspects of the existing publishing system. The

initiate enables libraries to work together to reach a sustainable open future for specialist academic books. Their vision is a healthy market that includes free access for end users.

- Liverpool University Press (LUP) (http://www.liverpooluniversitypress.co.uk/), Liverpool, UK, is one of Europe's oldest university presses. LUP's mission is to disseminate high quality scholarly research and to promote learning and culture through the publication of books and journals. OCLC will index metadata and full text for Modern Languages Open (MLO), a peer-reviewed online platform for the open access publication of research from across the modern languages to a global audience.

- The Metropolitan Opera (http://www.metoperafamily.org/metopera/index.aspx?) based in New York, New York, USA, has introduced an online video and audio streaming service available to universities and colleges, connecting academic users to a digital catalog of more than 450 full-length Met performances. Met Opera on Demand: *Student Access* is available to colleges worldwide through a license subscription. OCLC will create and distribute bibliographic records for the video and audio performances.

- Mintel Group Ltd (http://www.mintel.com/) based in London, UK, is a leading global supplier of consumer, product, and market intelligence. For 40 years, Mintel has provided insight into key worldwide trends, offering exclusive data and analysis that directly impacts client success. OCLC will index data for the Oxygen Collection.

- Morgan & Claypool Publishers LLC (http://www.morganclaypool.com/) based in San Rafael, California, USA, is an innovative new company formed by experienced publishing professionals to serve the global research and development communities in science and technology. Its mission is to create "next-generation" digital information products that combine authoritative content with state-of-the-art technology and a customer-oriented business model. OCLC will include The Synthesis Digital Library of Engineering and Computer Science the Colloquium Digital Library of Life Sciences.

- Naxos of America, Inc. (http://www.naxos.com/) based in Franklin, Tennessee, USA, is the world's leading classical music labels. Naxos' catalogue includes classical music CDs and DVDs as well as genres, such as jazz, new age, educational, and audiobooks.

- NBC Learn (http://www.nbclearn.com/portal/site/learn) based in New York, New York, USA, is the educational arm of NBC News dedicated to providing resources for students, teachers, and lifelong learners. NBC Learn has created online resources for the education community leveraging historic news coverage, documentary materials, and current news broadcasts. NBC Learn also offers primary source materials, lesson plans, and classroom planning resources. NBC Learn will be providing OCLC data for their NBC Learn K-12 and NBC Learn Higher Ed collections.

- Publishers Row (http://www.publishersrow.com/) based in Skokie, Illinois, USA, is one of the industry's e-book pioneers with more than 15 years of e-book development experience. Publishers Row is a wholly owned subsidiary of Varda Graphics and serves as a technology platform solution for digital editions of books for hundreds of publishers from conversion to invoicing. OCLC will receive data for the ALA's CHOICE E-Collection e-books and Judaica Studies.

- Recorded Books, LLC (http://www.recordedbooks.com/index.cfm) based in Prince Fredrick, Maryland, is a leading provider of library services around the world, one of the largest independent producers of unabridged audiobooks, and a distributor of other audio products.

Recorded Books delivers its products as both physical media (CDs and Playaway digital players) and via OneClickdigital, a downloading service featuring e-books and professionally narrated English and Spanish Language audiobooks for adults, children, and young adults. Through RBdigital, Recorded Books also offers a host of educational and entertainment services, including digital magazines, language-learning programs, software training, and database services.

- Thieme Medical Publishers (http://www.thieme.com/) based in Stuttgart, Germany, is an award-winning international medical and science publisher serving health professionals and students for more than 125 years. Thieme promotes the latest advancements in clinical practice, publishes the latest research findings, and advocates medical education. OCLC will index metadata for Thieme journals.

Both WorldCat and the WorldCat knowledge base continue to grow with new providers and collections. For more information on current content lists, see the WorldCat (http://www.oclc.org/en-US/worldcat-local/content/dblist.html) and WorldCat knowledge base pages (http://www.oclc.org/en-US/knowledge-base/collections.html) on OCLC.org.

Discovery and Reference

WorldCat Discovery Services
OCLC introduces WorldCat Discovery Services, a new suite of cloud-based applications that brings together the FirstSearch and WorldCat Local services. Set to launch in March 2014, the new suite will enable discovery of more than 1.3 billion electronic, digital, and physical resources in libraries around the world through a single search of both WorldCat and a central index that represents nearly 2,000 e-content collections. This will make it possible for more than 18,000 FirstSearch libraries to offer a richer discovery experience. WorldCat Discovery Services will offer library users and staff access to rich, global bibliographic content available only through WorldCat. A central index will enable information seekers from mutually subscribing libraries to search authoritative sources from providers such as EBSCO, Gale, and ProQuest. Direct link resolution from citations to full-text resources will be available for libraries with holdings in WorldCat and the WorldCat knowledge base. Resources not available electronically can be delivered through integrated interlibrary loan. WorldCat Discovery Services will be available to FirstSearch users in March as part of existing subscriptions. FirstSearch will operate in parallel during a year-long transition so libraries can choose when to move to the new service. New features for FirstSearch subscribers include access to the central index that represents more than a billion articles, e-books, and other e-content; a new user interface that adapts automatically to mobile devices; and the ability to manage access to digital collections. Additional new features provided for libraries that maintain up-to-date holdings in the WorldCat database include direct links to full-text resources to which they subscribe, a built-in A to Z list, and their library's resources listed first in search results. Libraries that maintain holdings in WorldCat will also continue to benefit from increased visibility of their resources through search engines and other popular websites where research often begins. The WorldCat Discovery Services suite also offers subscribers several optional features for a fee, such as real-time availability, group view of available resources, management of course reserves or reading lists, or customized traffic and usage reports. WorldCat Local libraries will also move to WorldCat Discovery

Services over the next 18 months. The transition will begin in April 2014 with a beta period when WorldCat Local subscribers can begin using the new services and plan transition activities. WorldCat Discovery Services is OCLC's second cloud suite. WorldShare Management Services, released in 2011, is a cloud suite of library management applications that is helping libraries reduce library management costs, streamline workflows, and improve access to their collections and services. There are currently more than 180 libraries using WorldShare Management Services and 100 more libraries and library groups in implementation.

ProQuest® Central Records Discoverable through WorldCat Discovery Services

More than 320 million records from 88 collections in the award-winning ProQuest® Central database (http://www.proquest.com/en-US/catalogs/databases/detail/proquestcentral.shtml) are now discoverable, and the full text associated with those records is now accessible, to mutual subscribers through OCLC WorldCat Discovery Services. The new discovery experience is possible through a data exchange agreement signed in 2013 by OCLC and ProQuest to enhance library discovery for users of WorldCat Discovery Services and the ProQuest Central full-text database. The program shares metadata from some of the world's most-widely used library collections, enriching the content and creating connections for users of both ProQuest Central and WorldCat Discovery. In November 2013, OCLC and ProQuest announced a collaboration to facilitate automation of the process to keep e-book holdings from ebrary and EBL – Ebook Library up to date in WorldCat and library catalogs, and offers current links to library users for easy access to those titles. ProQuest Central is the largest multidisciplinary, full-text database available in the market today. The agreement between ProQuest and OCLC will provide access to the primary ProQuest Central database and 88 of its most widely-used databases. With journal, newspaper, and scholarly content in more than 160 subjects, it's regarded as the broadest single research resource in the world. Now, libraries can choose to access their ProQuest Central subscription content through WorldCat Discovery Services as well as the ProQuest Summon service.

StyleEase Uses WorldCat Data to Help Automate Citations for Students

The partnership provides quick search access to the world's library collection via WorldCat. The data is available through the WorldCat Search API as a part of the WorldShare Platform. The WorldShare platform gives flexible, open access to the shared library data of the cooperative, so that students can discover, cite, and create lists for information in e-books, books, chapters, magazines, newspapers, websites, journals, films, and more. One of the citation services' advantages is that it lets users view the citation format as they enter their information, so they learn how to reference materials as they go. StyleEase uses WorldCat data to quickly fill citation information. It then formats and compiles a bibliography according to the guidelines of whichever style manual the user selects. Manual entry is also an option. Other citation partners using WorldCat data include EasyBib, BibMe, Citavi, Cite This For Me, EndNote, OttoBib, RefWorks, T and Biscuits, and WriteCite. StyleEase owes its beginnings to the organization's founder, Gary Hillerson, who wrote his psychology Master's thesis in APA format. He used his software and technical writing background to develop the original APA-style software product, FormatEase, in 1991. Following the success of that product and other products for students and professionals who need to write in other formats, the organization built on his expertise to develop StyleEase for Chicago/Turabian Style (http://www.styleease.com/ChicagoStyle.html) and StyleEase for

MLA Style (http://www.styleease.com/MLAFormat.html). For additional information about how OCLC partnerships benefit libraries, visit the OCLC Partnerships page at http://www.oclc.org/en-US/partners-for-libraries.html.

OCLC Partnership with Novelry Helps Connect Readers with Libraries

OCLC is pleased to add the newly launched book search engine Novelry (http://novelry.com/) to its growing list of WorldCat.org traffic partners in the United States. Based in Omaha, Nebraska, Novelry provides a framework to find connections based on what users care about most. For example, clicking on the "Book Cover" icon provides information on when the book was written, what it is about, the subject, as well as the genre. Readers can also add filters to narrow their search as many times as they want with additional search information—including favorite book, topic, or award-winning book. Once the user discovers what they are looking for, they can select the "Borrow" link feature, which uses WorldCat to connect them to the libraries in their area that hold the book or books. No registration is needed to use Novelry, which currently is available on the web and tablets. Novelry joins other WorldCat.org traffic partners who provide search options for their users that connect to libraries, including Goodreads, EasyBib, DesignersandBooks, and Citavi.

Management Services and Systems

PALNI First Academic Group to Select OCLC WorldShare Management Services

The Private Academic Library Network of Indiana (PALNI), which provides library automation services to 23 institutions, is the first academic group to select OCLC WorldShare Management Services as its cloud-based library management system. WorldShare Management Services is an integrated suite of library management applications—from acquisitions and circulation, to metadata and license management, resource sharing and analytics—designed to simplify and streamline workflows, reduce costs and create new value for libraries and their users. PALNI selected WorldShare Management Services in September 2013. They are currently in the implementation phase, which includes data migration, staff training, and product configuration. PALNI expects to be live with the services in the summer of 2014. Today, more than 170 libraries on three continents—Australia, Europe, and North America—are using OCLC WorldShare Management Services, which were released for general availability in July 2011. More than 110 more libraries are in the process of implementing the new services. Other library groups are using WorldShare Management Services; PALNI is the first academic group. More about OCLC WorldShare Management Services can be found on the OCLC website.

Resource Sharing

Article Exchange Custom Version Now Available

A custom version of OCLC's Article Exchange document delivery tool (http://www.oclc.org/worldshare-ill/features/article-exchange.en.html) is now available for use by OCLC resource sharing subscribers. The custom version delivers all features of Article Exchange in addition to local customization that increases the visibility of library services and reinforces a library's role in meeting user needs. Use Article Exchange to:

- Reinforce your library's brand. When users see your logo, colors, and library name on the interface where they retrieve documents, they are reminded that the service is provided by their library.
- Deliver larger file sizes. Deliver files up to 120 MB (compared to 60 MB supported by the basic version). Support for larger files is particularly useful for users who require access to large documents, such as image-rich medical resources.
- Communicate your library's identity to users who access your library virtually as well as physically. The custom version of Article Exchange supports secure delivery of documents to users regardless of their location. For example, an academic library can use the tool to reach students or faculty at off-campus locations or distance learners who rarely visit campus. Library branding and interface customization add visibility for library services.
- Provide secure delivery of the electronic resources library users expect. As libraries' services expand to include more and more electronic and digital resources, use of the Article Exchange custom version is an invaluable tool for delivering files that are often too large for transmission via other vehicles, including the original Article Exchange tool. Supporting file sizes up to 120 MB (compared to 60 MB supported by the basic version), the custom version of Article Exchange is particularly useful for users who require access to large documents, such as image-rich medical resources.
- Transmit documents in formats that can be used by visually impaired users. Support for file formats .doc and .docx enables this segment of your users to consume documents through screen readers and related devices.

Local customization of Article Exchange is easy, so library staff can complete set up quickly and begin to use their library-specific site to deliver documents to their users. Library staff may also customize the e-mail messages that accompany document links. Article Exchange custom version provides a low-cost way for libraries to increase the visibility of their services while delivering essential documents to users. Subscribers to OCLC resource sharing services can add the custom version to existing resource sharing subscriptions for a small annual fee, based on library collection size. To order the new Article Exchange custom version for your library, complete the order form at http://oc.lc/aecustomorder. This order form provides pricing for several ranges of library collection sizes.

Member Services, Advocacy, and Training

OCLC and Yelp Increase Visibility of Libraries on the Web

OCLC is working with Yelp (http://www.yelp.com/columbus-oh-us), the leading website and mobile app that connects consumers with great local businesses, to increase public access to local library information. Yelp is integrating information from the database of library listings maintained through the OCLC Library Spotlight program (http://www.worldcat.org/spotlight/organization/) to supplement existing library listings on Yelp.com. Information provided through OCLC has already been added to over 1,400 library listings on Yelp.com, ensuring that accurate addresses, phone numbers, hours, and other information will be available in addition to information already listed on Yelp. The OCLC Library Spotlight program offers a free, easy-to-use service with which any library can add, edit, and update its own profile that will then appear on online listing sites. Yelp is the first to work with OCLC, which will

incorporate more partners in the future to give libraries greater visibility on the Web. Libraries can already claim their free account and use a suite of business tools on Yelp. The Library Spotlight program improves access to online library information by providing a convenient way for Internet services to update multiple library listings at once, at scale. The Library Spotlight program also uses data from the WorldCat Registry to pre-populate information about thousands of library locations. Libraries can use the Library Spotlight program to update and enhance that information, or create a new account if none exists. The partnership between OCLC and Yelp was first announced in April 2013. The initial feed of library data is now available on Yelp. OCLC will provide Yelp with additional profiles and updates on a regular basis.

OCLC Research

OCLC Research Launches Scholars' Contributions to VIAF Activity

This activity explores the benefits of collaborating with scholars to enrich the Virtual International Authority File (VIAF) with new names from scholarly communities and additional script forms. VIAF combines multiple name authority files into a single OCLC-hosted name authority service that is freely available on the Web. Most VIAF contributors to date have been national libraries and other library agencies. However, scholars have a stronger affiliation with their discipline than with any one institution. And although scholarly projects are often international in scope, some minority languages do not have an agency such as a national library committed to supporting their documentation needs. To explore the benefits of collaborating with scholars to enrich VIAF, OCLC Research has launched a Scholars Contribution to VIAF activity (http://www.oclc.org/research/activities/viaf-scholars.html) that provides a path that domain experts can use to contribute their research in the form of authority data to enrich the information already in VIAF. Contributing their authority data to VIAF will benefits scholars by:

- Providing them with a resource for disseminating their scholarly research on names beyond their own communities make to libraries and researchers around the globe.
- Giving them the ability to contribute names to VIAF in scripts that are not represented in the MARC 21 character set used in the LC/NACO Authority File, since VIAF supports Unicode.
- Generating VIAF uniform resource identifiers (URIs) as persistent identifiers for the names contributed that scholars can use in their own databases, linked data applications, scholarly discourse, and name disambiguation in multinational collaborations.

In addition, both scholarly societies and libraries will benefit from this activity because it will enrich VIAF with name authority data that would not otherwise be contributed by national libraries. It will also increase the number of "alternate names" associated with VIAF clusters that include scholars' contributions with scripts that are not yet represented. The first set of personal names from a scholarly resource loaded into VIAF as part of this project are now live. Greek names from the Perseus Catalog hosted by Tufts University, an OCLC Research Library Partnership institution, are now available in VIAF in Greek and sometimes Arabic script forms. The Perseus Catalog aims to provide access to at least one online edition of every major Latin and Greek author from antiquity to 600 CE. Adding the Greek,

Arabic, and other script forms of names in the Perseus Catalog enriches existing VIAF clusters that previously lacked them. The number of "alternate name forms" associated with VIAF clusters that include the Perseus Catalog's contributions has already increased, with scripts not yet represented. OCLC is eager to welcome VIAF contributions from other scholarly communities.

New Data and Visualizations Available on MARC Usage in WorldCat Site

OCLC Research is studying utilization rates of MARC tags and subfields in WorldCat and producing tools and reports to ultimately inform decisions about where we go from here with the data that has been encoded using the MARC standard. The MARC Usage in WorldCat website has been updated with October 2013 reports and with two new data visualizations. One visualization depicts every field by format and then by tag in a zoomable starburst diagram, and the other depicts every field first by tag and then by format in a zoomable starburst. Actual numbers can be seen while hovering over the tag. If you wish to see a report on a particular subfield, please contact Senior Program Officer Roy Tennant (http://www.oclc.org/research/people/tennant.html). For more information about this project, see the MARC Usage in WorldCat activity page at http://www.oclc.org/research/activities/marcusage.html.

Issue 11 of *OCLC Research Quarterly Highlights* Now Available

The periodic bulletin, *OCLC Research Quarterly Highlights* (http://www.oclc.org/research/publications/newsletters/quarterlyhighlights/2013-14q2.html), gathers items from the previous quarter of work in OCLC Research, the OCLC Innovation Lab, and the OCLC Research Library Partnership. Issue 11 covers the period of October - December 2013. Highlights include:

- Lorcan Dempsey on interrogating the collective collection.
- Bruce Washburn on early adoption and continued adaptation.
- Seven publications released during the quarter.
- A recap of OCLC Research news, events, webinars, and presentations.
- The six themes that shape our work, with a featured activity from each.

Starting the Conversation: University-Wide Research Data Management Policy

Written by Senior Program Officer Ricky Erway, *Starting the Conversation: University-Wide Research Data Management Policy* (http://www.oclc.org/research/publications/library/2013/2013-08r.html) is a call for action that summarizes the benefits of systemic data management planning and identifies the stakeholders and their concerns. It suggests that the library director proactively initiate a conversation among these stakeholders to get buy-in for a high-level, responsible data planning and management policy that is proactive, rather than reactive. It also addresses the various topics that should be discussed and provides a checklist of issues to help the discussion result in a supportable and sustainable policy. Key highlights from the report include:

- The benefits of funder-required data management planning should apply to all research data.
- Research and Compliance Offices, IT, Academic units, the Library, and Researchers should be involved in setting policy.

- An entrepreneurial person may need to get things going—why not the library director?

The intended audience for this call for action is library directors, not only because their libraries may be recipients of data in need of curation and of requests for guidance, but—more importantly—because library staff have significant skills and experience to contribute to the discussion. This is an opportunity for the library director to play an entrepreneurial role in furthering the mission of the larger enterprise. This report was made possible by the contributions and support of the OCLC Research Library Partnership Data Curation Policy Working Group whose broad range of experience and perspectives was invaluable. This work is an output of our Role of Libraries in Data Curation activity, which falls under our work agenda theme of Advancing the Research Mission.

New Report: *Understanding the Collective Collection*

OCLC Research has released a new report, "Understanding the Collective Collection: Towards a System-wide Perspective on Library Print Collections," which establishes evidence that has allowed and encouraged libraries to begin the shift from local provisioning of library collections and services to increased reliance on cooperative infrastructure, collective collections, shared technology platforms, and "above-the-institution" management strategies. "Understanding the Collective Collection" collects important work OCLC Research has done for the community in recent years in providing a quantitative, analytic, system-wide view of library collections. It provides critical context for the policy, service, and strategy questions raised by shared print discussions in the library community. These discussions are driven by several factors:

- Interest in shared print strategies has had several drivers: Google Books; the digital turn: changing patterns of research and learning; the opportunity costs of current use of space; efficient access to materials; and a general move to collaboration.
- The network turn is leading to changes in the focus, boundaries, and value of library collections.
- Libraries and the organizations that provide services to them are devoting more attention to system-wide organization of collections—whether the "system" is a consortium, a region, or a country.
- Libraries are beginning to evolve arrangements that facilitate long-term shared management of the print literature as individual libraries begin to manage down their local capacity.
- A system-wide perspective signals a real shift in emphasis.

Lorcan Dempsey, OCLC Vice President, Research, and Chief Strategist, co-authored the report and coined the term "collective collection" to refer to this more focused attention on collective development, management, and disclosure of collections across groups of libraries at different levels. He provided the context for this work in the report's introduction, "The Emergence of the Collective Collection: Analyzing Aggregate Print Library Holdings," which is also available as a separate document. He also described OCLC Research's three broad interests around better understanding the existing collective collection and supporting the optimal evolution of reconfigured collections:

1. Understanding the characteristics of the collective print collection.
2. Supporting policy and service decision-making with good intelligence based on WorldCat and other data resources.

3. Understanding patterns or trends within the scholarly and cultural record.

View and download the report as well as the introduction from the "Understanding the Collective Collection" report page at http://www.oclc.org/research/publications/library/2013/2013-09r.html. More information on OCLC Research's work in this area can be found on the Understanding the System-wide Library Web page at http://www.oclc.org/research/activities/aboutusl.html.

Digital Humanities: Options for Research Libraries Covered in New Essay

The digital humanities (DH) are attracting considerable attention and funding at the same time that this nascent field strives for an identity. Some research libraries are committing significant resources to creating DH centers. But questions about whether such an investment is warranted persist across the cultural heritage community. In this *Does Every Research Library Need a Digital Humanities Center?*, Jennifer Schaffner and Ricky Erway suggest many ways to respond to the needs of digital humanists, and creating a DH center is appropriate in relatively few circumstances. They also share examples of successful collaborations with DH, but caution that one size does not fit all. Key highlights from the report include:

- In most settings, it is best to observe what DH academics are already doing and then set out to address gaps. This may include:
  - Package existing collections and services as a "virtual DH center."
  - Advocate coordinated support for digital scholarship across the parent institution.
  - Create avenues for scholarly use and enhancement of metadata.
  - Consult scholars at the beginning of library digitization projects.
  - Get involved in planning for sustainability and preservation of DH research results.
  - Commit to a DH center.
- A "DH-friendly" environment may be more effective than a DH center.
- Library culture may need to evolve in order for librarians to be seen as effective DH partners.

This essay is intended to prepare research library directors and other decision makers to respond to questions from deans or provosts who may ask what the library is doing about the digital humanities. It discusses specific concerns of digital humanists and ties these to decisions that might be made by directors, in hopes of bridging the gap between how library directors and DH researchers think about the library's role in digital humanities.

OLAC members

The Membership Directory can be found at:

http://olacinc.wildapricot.org/Default.aspx?pageId=1715775

To search the directory and update your information
you first need to establish your password:

1) enter your email in the upper right-hand corner of the page
2) click "Forgot password"

Any questions or problems with the directory or updating your information
please contact:

Heather Pretty
hjpretty@mun.ca
Queen Elizabeth II Library
Memorial University of Newfoundland
St. John's, NL A1B 3Y1
CANADA

Not an OLAC member?

JOIN US!

With the move to RDA, all those metadata questions you have, and the
OLAC Biennial Conference coming up in October 2014,

now is the time to join
one of the most active, vital and user-friendly library organizations out there.

It's easy (and only $20/year). Follow the link below to join:

http://olacinc.wildapricot.org/Default.aspx?pageId=1715773