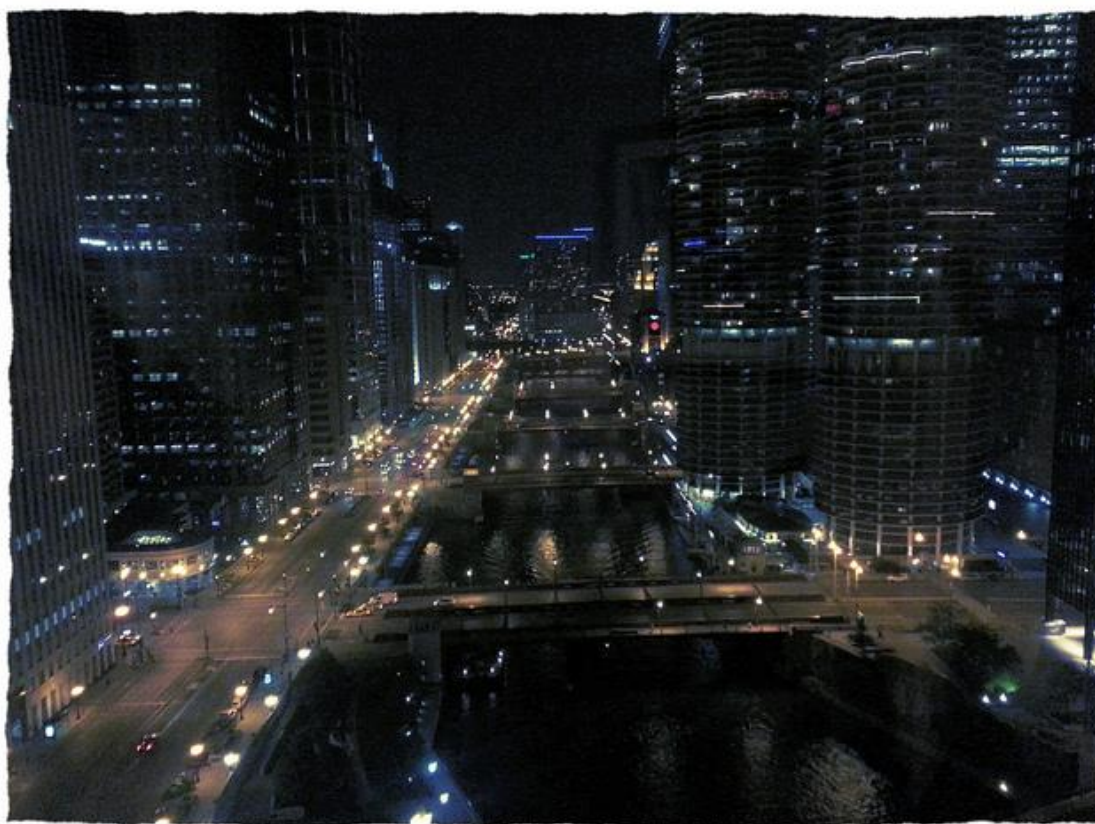


# 2013

## OLAC NEWSLETTER



Chicago at night

Photo courtesy: Marcy Strong

Volume 33  
Number 3

September  
2013

## THE OLAC NEWSLETTER

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Material for publication in the OLAC Newsletter should be sent to the appropriate editor. Persons wishing to review books should contact 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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**OUTREACH-ADVOCACY COORDINATOR**

VACANT

## FROM THE PRESIDENT

Liz Miller



I have been a member of OLAC since 2008, but didn't consider getting more involved until I attended my first OLAC conference in Macon, Georgia in 2010. What a revelation that was! The practical, hands-on workshops and the friendliness of other OLAC members made me feel like I had finally found "my people" in the world of cataloging. I enjoyed serving as OLAC's Vice President/President-Elect last year, and am honored to begin my service as President. I look forward to working with Marcia Barrett, our new Vice President/President-Elect. Marcia brings great experience to this role, having served as OLAC Secretary and a member of CAPC in the past.

I want to thank our immediate past President Heidi Frank for her outstanding leadership as OLAC President over the past year. During Heidi's tenure, OLAC held a successful conference in Albuquerque, N.M., work on a new logo was advanced, and a major revision of the OLAC Handbook was started. I greatly appreciate her generous help, advice, and reminders to me over the past year.

I would also like to thank those OLAC Board Members whose terms ended in 2013: Treasurer/Membership Coordinator Bruce Evans, CAPC Chair Walter Walker, and Outreach-Advocacy Coordinator Leanne Hillery. I know we all appreciate their hard work and the many contributions they have made to the success of OLAC.

Three new officers joined the Board at the end of ALA Annual in July: Vice-President/President-elect Marcia Barrett; CAPC Chair Mary Huisman; and Treasurer/Membership Coordinator Heather Pretty. I am looking forward to working with all of them, as well as our continuing board members: Secretary Scott Dutkiewicz and Newsletter Editor Marcy Strong. We are looking for someone to fill the position of Outreach-Advocacy Coordinator (see announcement in this newsletter); please contact me ([eamiller@nmsu.edu](mailto:eamiller@nmsu.edu)) if you are interested.

A lot of work is going on under the auspices of OLAC. CAPC's much-anticipated guide to cataloging Blu-rays and DVDs with RDA will be published this fall. CAPC is also working on an RDA best practices guide

for streaming media. Preparations are underway for the 2014 OLAC conference in Kansas City, Missouri. Work continues on a new logo for OLAC, and a major revision of the OLAC handbook.

The world of A/V cataloging continues to be in flux, with more and more libraries implementing RDA, and linked data coming closer to being a reality. OLAC will continue to be a leader in defining best practices for A/V materials as cataloging standards and practices change and evolve. I encourage every OLAC member to consider becoming more involved and help shape the future of A/V cataloging.

## FROM THE EDITOR

**Marcy Strong**



Happy Fall everyone! It's time to tuck into some pumpkin spice-something and some A/V cataloging updates. We will be happy to help with the cataloging as you will find this issue full of news from the recent ALA conference in Chicago. If you missed any of the OLAC meetings, you can catch up with a quick overview of the minutes and some pictures. Additionally, there are updates from CC:DA, Library of Congress, MARBI and MOUG. Finally, please say hello to T.J. Kao who is this month's feature for the *In the Spotlight* column. T.J. is our News & Announcements Editor and he shares some of his favorite cataloging experiences and some helpful advice.

Don't miss the call for getting involved in OLAC! We are looking for candidates for the Vice-President/President-Elect and Secretary positions (elected) as well as the Outreach-Advocacy Coordinator (appointed). These are great opportunities to gain some leadership experience and help an organization you love. Plus, we're a pretty fun group. See page 28 for all the details.

**TREASURER'S REPORT**

**4th Quarter FY13**

**April 1 – June 30, 2013**

**Bruce J. Evans**

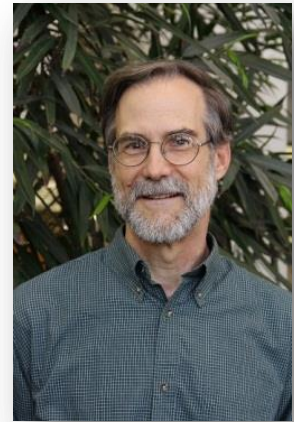


Treasurer's Report		
4th Quarter FY13, April 1-June 30, 2013		
Bruce J. Evans, Treasurer		
	4th Quarter	FY-to-Date
<b>Opening Balance</b>	12,048.76	\$ 12,048.76
<b>Income</b>		
Memberships	\$ 469.90	\$ 5,632.21
OLAC 2012 Conference Profit	\$1,929.54	\$ 1,929.54
<b>Total</b>	<b>\$2,399.44</b>	<b>\$ 7,561.75</b>
<b>Expenses</b>		
ALA Room Charge	\$ 140.00	\$ 280.00
ALA Affiliate Membership		\$ 150.00
Midwinter Membership Meeting A/V	\$ 71.25	\$ 1,051.20
OLAC Board Dinner, Midwinter 2013		\$ 482.80
OLAC 2012 Executive Board Stipend		\$ 500.00
ALA Midwinter Meeting Board Stipend		\$ 500.00
Nancy B. Olson Award Plaque	\$ 223.36	\$ 223.36
Research Grant Stipend	\$ 399.33	\$ 663.99
OLAC 2012 Scholarship Stipend		\$ 982.84
OLAC Logo Work Payment		\$ 125.00
Survey Monkey Select Subscription		\$ 204.00
Blue Host web hosting annual bill		\$ 196.76
PayPal Fee	\$ 10.05	\$ 99.41
<b>Total Expenses</b>	<b><u>\$ 843.99</u></b>	<b><u>\$ 5,459.36</u></b>
<b>Closing Balance</b>		<b>\$ 13,601.21</b>
Personal Membership	228	
Institutional Membership	<u>12</u>	As of June 30, 2013
<b>Total</b>	<b>240</b>	



## MEETING MINUTES

Scott M. Dutkiewicz



### OLAC Executive Board Meeting

ALA Annual Conference

Chicago, IL

June 28, 2013

#### 1. Introductions and Announcements

President:	Heidi Frank
Vice-President / President-Elect:	Liz Miller
Vice-President / President-Elect:	Marcia Barrett (incoming)
Secretary:	Scott Dutkiewicz
Treasurer:	Bruce Evans
Treasurer:	Heather Pretty (incoming)
Newsletter Editor:	Marcy A. Strong
Immediate Past President:	Amy Weiss
Past Past President:	Sevim McCutcheon
CAPC Chair:	Walt Walker
CAPC Chair:	Mary Huismann (incoming)
Outreach-Advocacy Coordinator:	Leanne Hillery
Others:	
OCLC Liaison	Jay Weitz
Webmaster	Teressa Keenan

**Present:** Frank, Miller, Barrett, Dutkiewicz, Pretty, Strong, Weiss, Walker, Huismann, Weitz, Keenan

**Absent:** Evans, McCutcheon, Hillery

The meeting began at 6 p.m.

**2. OLAC Logo designs from Meredith Lavelle (Frank)**

The Board considered seven designs that had been narrowed down from 15 designs that Frank distributed in a poll on Jan. 17, 2013. The byline “media catalogers network” was acceptable. Frank will mock up 2 versions with OLAC in serif font, excluding color and the circle motif. Once the designer cleans the images, Miller will send these two designs out to the membership for comment.

**3. Structure of Website Steering Committee (Frank)**

The Past President (Frank) will revive the website committee. The committee will consist of the webmasters (Teressa Keenan and Cyrus Ford) and two other volunteers. Weiss has a list of volunteers that she will share with Frank. Submission to the website should be sent to both webmasters.

**4. Major Handbook rewrite (Dutkiewicz)**

Dutkiewicz described changes that he anticipates making to the Handbook. Most are routine; there could be one or more conflicts between the Bylaws and the Handbook, in which case the Bylaws govern. The Board recommended deletion of the section listing the Nancy B. Olson award winners and the Conference planning guide (the website is a better location for both). Issues related to the OLAC archives and the current arrangement with Mankato State University were explored. Liz Miller will contact Bobby Bothmann for more information.

**5. CAPC membership (Walt Walker)**

Walker reported that CAPC is fully appointed. There was one vacancy, but Julie Moore will take up this intern position. The new NACO coordinator is Peter Lisius. The NACO-AV website has been updated.

**6. Other Appointments**

Leanne Hillery has stepped down from Outreach Coordinator. This Board opening will be announced by Frank at the membership meeting and at the CAPC meeting by Walker. The MOUG liaison is also open.

**7. Webinar videos for training and publication (Heidi Frank per K. McGrath)**

The idea to capture OLAC presentations in a webinar has been brought forward. A combination of PowerPoint and a voice recording is the easiest format. (Another option, Slideshare, offers no sound.) This work will be delegated to the new Outreach Coordinator. It was agreed that there would be no AV equipment reserved for ALA Midwinter in order to save money for a formal presentation at ALA annual.

**8. Status of membership database – updates (Heidi Frank for Bruce Evans)**

Frank reported that the reinstatement of OLAC’s non-profit status with the IRS is in progress. Wild Apricot software is likely to be selected to manage the membership database. The treasurer’s report shows a balance of \$13,590, with \$1,924 proceeds from OLAC conference 2012, membership is at 241, up from 225.

Meeting adjourned at 7:00 p.m.

## **OLAC/Cataloging Policy Committee (CAPC)**

ALA Annual Conference

Friday, June 28, 2013

**Members present:** Walter Walker (chair), Mary Huismann, Stacie Traill, Diane Robson; ex-officio: Kelley McGrath, Janis Young, Jay Weitz, John Attig

**Others attending:** Scott M. Dutkiewicz, Marcy Strong, Liz Miller, Sandy Roe, Bryan Baldus, Carolyn Walden, Iris Wolley, Kevin Whitfield, Adolfo R. Tarango, Ray Schmidt, Felicity Dykas, Sandy Rodriguez, Nancy Kael, Cheryl Wegner, Becky Culbertson, Heather Pretty, Heidi Frank, Kathy Glennan, Nancy Lorimer, Julie Moore.

Chair Walt Walker called the meeting to order at 7:32 p.m.

**1. Welcome and introductions**

**2. Approval of minutes.** The minutes of the January 25, 2013 minutes were approved.

**3. Announcements.** Walker described changes to CAPC's membership and chair. Walker and Cyrus Ford are leaving; Beth Cox and Margaret Glerum are new members; new interns are Patricia Ratkovich and Julie Moore. The new CAPC Chair is Mary Huismann. NACO Co-coordinators David Prochazka and Ann Caldwell have resigned. The new NACO Coordinator is Peter Lisius.

OLAC needs an Outreach Coordinator and a MOUG Liaison. The latter position requires dual membership in OLAC and MOUG. If interested please contact either Heidi Frank or Liz Miller.

**4. Reports and discussions:**

**a) DVD/Blu-Ray Disc RDA Guide Task Force.** Diane Robson reported that the task force hoped to have the document ready for this convention. Committee membership changes have brought several new members with great ideas and have helped immensely as they near completion. The report is about 95% done. Release has been postponed to treat a few new MARC fields, update links, and to thoroughly edit the document. Release goal for review is now September 2013, with approval by CAPC definitely before ALA Midwinter.

**b) CC:DA report** (K. McGrath) See page 16.

**c) LC report** (J. Young) See page 20.

**d) OCLC report** (J. Weitz) Jay Weitz announced that OCLC has a new President, Skip Prichard, as of July 1. The database is burgeoning: WorldCat added its 300 millionth record on June 7; the 30 millionth record was added through the WorldCat Digital Collection Gateway on May 26; and WorldCat holdings are at 2 billion as of May 4. Weitz noted that pre-AACR2 fields and indicators are being cleared from bibliographic records. Technical Bulletin 262 is available. Bibliographic Formats and Standards (BFAS) updating is in process, incorporating Technical Bulletins 261 and 262. A new content management

system now allows for quicker changes and RDA updating where applicable. OCLC will be contacting OLAC to solicit help from CAPC about RDA updating for audiovisual materials.

**e) MOUG report** (M. Huisman) Mary Huisman reported on developments from the Music OCLC Users Group. The MOUG newsletter is now included in EBSCO library/music products. She summarized highlights of the Annual Meeting: Five Papakhian Travel Grants were awarded; Matt Montgomery (of OCLC) was honored with the Distinguished Service award; OLAC's Bruce Evans is now Vice Chair/Chair-Elect. Conference presentations are available at the MOUG website ([www.musicoclcusers.org](http://www.musicoclcusers.org)). She announced MOUG's 2014 annual meeting, with the Music Library Association, in Atlanta, GA, tentatively Feb. 25-26.

**f) Subcommittee on Maintenance for CAPC Resources** (W. Walker for R. Leigh) Walker reported that resources are being reviewed and updated.

**g) Audiovisual Materials Glossary Update Task Force** (H. Frank) Heidi Frank reported that about 400 terms in the glossary are under review, then will be batchloaded to the OLAC website. She described the need for ongoing maintenance of the Glossary and NISO registration.

**h) RDA Revision Proposals Task Force** (S. Traill) Traill described two issues that overlapped with the CC:DA report (Statement of responsibility/credits; measurement for videorecordings).

**i) Streaming Media/Video RDA Guide Task Force** (S. Traill for J. Ho) Traill noted that several sections of this guide have been drafted and discussed. The deadline for review by CAPC is Midwinter 2014. The most pressing issue is the matter of PCC provider-neutral guidelines. The task force is exploring the use of tag 347 (like the use of 856) to record vendor-specific technical details. Numerous questions came up about the coding, maintenance, and usability of such data. Comments and non-routine examples are welcome, especially for works issued on hard drives or other storage media.

**j) MARBI report** (John Attig for C. Gerhart) John Attig summarized a few MARC format proposals, none of which are specific to audiovisual cataloging. Discussion papers are anticipated for 588 field usages indicators and for 388 (chronological terms) in the Authorities format. The successor to MARBI, the MARC Advisory Committee, will not have an official ALA connection. The MARC format is still being maintained. Cate Gerhart is the OLAC representative to this committee.

## **5. New business**

**a) Recommendations for future CAPC documentation revisions for RDA** (W. Walker) Walker described a task force to develop a general (carrier-neutral) guide for moving images that treats common principles for either DVD or streaming media. When this task force is charged, its dependencies to other task forces will need to be clarified.

**b) Suggestions for presentations at ALA Midwinter in Philadelphia or ALA Annual in Las Vegas** (W. Walker) No suggestions were made at this time. Contact Mary Huisman (incoming Chair).

**6. Adjournment.** The meeting was adjourned at 9:24 p.m.

**OLAC Membership Meeting**  
ALA Annual Conference  
Sunday, June 30, 2013

**Present:** Heidi Frank (New York Univ.) Liz Miller (New Mexico State Univ.) Marcia Barrett (Univ. of California Santa Cruz ) Julie Moore (California State Univ., Fresno) Scott M. Dutkiewicz (Clemson Univ.) Amanda Raab (Rock Hall of Fame) Cathy Lamoureaux (Carnegie Library of Chicago) Mary Huismann (Univ. of Minnesota) Heather Pretty (Mem. Univ. of Newfoundland) Kelley McGrath (Univ. of Oregon) Amy Weiss (Florida State Univ.) Jay Weitz (OCLC) Marcy Strong (Univ. of Rochester) Rosemary Groenwald (Mt. Prospect PL) Scott Piepenburg (Univ. of Wisconsin-Stevens Pt.) Teresa Keenan (Univ. of Montana) Paula Riddle (Mackin Edu. Resources) Jennifer Eustis (Univ. of Connecticut) Cate Gerhart (Univ. of Washington) Tachtorn Meier (Yale Univ.) Lori Robare (Univ. of Oregon) Bojana Skarich (Michigan State Univ.) Betty Landesman (Univ. of Baltimore) John Galdun (Indian Trails PL) Eve Lashley (Arlington Heights. Mem. Library) Amy Pennington (St. Louis Univ.) Joy Anhalt (Tinley Park PL) Kathy Setter (Indianhead Library System) Gayle Porter (Chicago St. Univ.)

**1. Welcome and Introductions**

President Heidi Frank called the meeting to order at 4:06 pm.

**2. Announcements**

- a. Presentation of Nancy Olson Award and OLAC Research Grant Award

The Nancy Olson Award and OLAC Research Grant were awarded to Kelley McGrath.



Photo courtesy: Marcy Strong

- b. New OLAC Executive Board members  
Frank introduced Liz Miller (President), Marcia Barrett (Vice President), Heather Pretty (Treasurer/Membership Coordinator), Mary Huismann (CAPC Chair)

### **3. OLAC Officers' Reports**

- a. Secretary's Report (Scott Dutkiewicz)  
Dutkiewicz will be revising the OLAC Handbook; if any revisions affect the Bylaws, these will be presented to the membership.
- b. Newsletter Editor's Report (Marcy Strong)  
Strong requested referrals for the Profile column in the OLAC Newsletter.
- c. Treasurer's Report (Frank for Bruce Evans)  
The treasurer's report shows a balance of \$13,590 up from \$12,048 with \$1,929 proceeds from OLAC conference 2012. Membership is at 241, up from 225. Tax exempt status is being restored, and a new membership database is being developed.
- d. Outreach/Advocacy Report (Heidi Frank)  
The positions of Outreach/Advocacy Coordinator and MOUG representative remain open.

### **4. CAPC Report (Walt Walker)**

No report.

### **5. Other Executive Board activities (Heidi Frank)**

- a. OLAC Logo update  
The OLAC logo revision is in a second round of designs. A final choice should be decided by ALA Midwinter.
- b. The 2014 conference, to be held jointly with MOUG will be in Kansas City, Missouri. Date is October 2014.

## 6. Presentation and Discussion

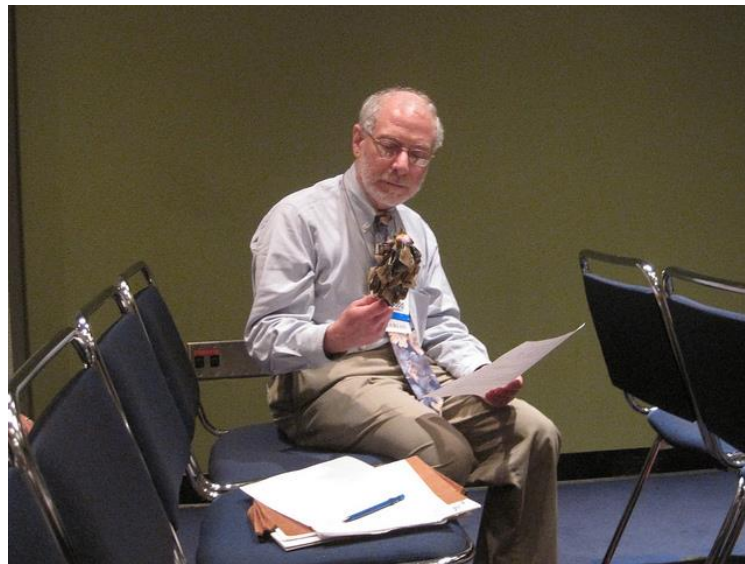
***“RDA and Funny Formats”***  
**Presented by Julie Moore,**  
Head of Cataloging, Henry  
Madden Library, California  
State University, Fresno

Julie Moore brought examples of teaching materials, and discussed how she cataloged them following RDA. She distributed examples of a variety of materials including model, transparency, flash card, game, toy, realia, and kit.



Photo courtesy: Marcy Strong

Her entertaining and informative presentation was followed by a wide-ranging discussion of how to apply RDA for special formats as well as general concerns.



Jay Weitz examines a goat rattle and associated RDA record

Photo courtesy: Marcy Strong

Interest was expressed about when the DVD/Blu-ray best practices guide would be available. Best estimate for this is by ALA Midwinter. There was also interest in video game genre terms, and discussion ensued about applying non-LCSH thesauri for subject/form/genre analysis. Others were

seeking guidance for the cataloging of datasets. Resource suggestions include the OLAC-L and MAPS-L listservs. AACR2 chapter 9 (as mapped to RDA) remains a helpful source.

## 7. New Business and Inauguration of new OLAC President

Liz Miller, the incoming President, thanked Heidi Frank for her service to OLAC, and adjourned the meeting at 5:35 pm.



Photo courtesy: Marcy Strong



**CONFERENCE REPORTS**  
**Jan Mayo, Column Editor**

**\*\* REPORTS FROM THE \*\***

**2013 ALA Annual Conference**  
Chicago, IL

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

**Liaison Report**

submitted by Kelley McGrath  
University of Oregon Libraries

A number of topics of interest to OLAC members were discussed at the CC:DA meetings at ALA Annual 2013.

**Personnel**

John Attig finished his second term as ALA representative to the JSC at Annual. CC:DA gave him a well-deserved standing ovation for his exceptional service. Kathy Glennan is the new ALA representative. Kathy is Head, Metadata Creation and Enhancement and a music cataloger at the University of Maryland. She has been involved in a number of joint projects between OLAC and the Music Library Association and is a regular CAPC attendee.

**Statement of responsibility and technical and performing credits**

A group with members from OLAC and the Music Library Association was charged with identifying a more principled approach to the divide between the Statement of Responsibility (MARC 245\$c, hereafter in this report referred to as SOR), Performer, Narrator, and/or Presenter (MARC 511, hereafter Performer) and Technical and/or Artistic Credit (MARC 508, hereafter Credit) elements in RDA. RDA carried over the special rules for recording performers and artistic and technical credits from AACR2 without really examining them. They seem to have been put in the section of chapter 7 devoted to describing content because most of the roles usually recorded here have been mapped by RDA to expressions.

The group was unable to reach consensus so we submitted a discussion paper to CC:DA (<http://alcts.ala.org/ccdablog/wp-content/uploads/2013/05/mla2013-1.pdf>).

In the discussion paper, we presented four options:

- Principled distinction

We found it hard to come up with a principled distinction, especially for SOR vs. Credits. AACR2 literally defines technical and/or artistic credits as “those who have contributed to the artistic and/or technical production who are not named in the SOR”). We discussed making a consistent distinction by putting work credits in SOR and expression credits in 508/511. This is not so good for pop/rock/jazz recordings. It also has undesirable effects on other materials (e.g., on editors, translators)

- Make no distinction and put everything in SOR

The argument here is that RDA is not about display and many of the reasons for the historical existence of different elements derive from display. However, in the real world this won't help users in a MARC/ISBD display for many materials, especially feature films. There would also be an additional burden of transcription and a loss of flexibility in presenting information.

- Make SOR non-core

In some earlier drafts of RDA, the SOR was non-core. There are two possible ways to implement this approach. Records could be created that only use access points and relationship designators. However, there would be a loss of information if the name on the manifestation is different from the authorized form and there would be a very long tail of relationship designators. Alternatively, records could use notes in combination with access points/identifiers (see problems with notes in the next section)

- Cataloger's judgment

If the instructions about Performers and Credits were moved to the notes section of chapter 2, placement of the data could be left to cataloger's judgment. Communities of practice and institutions could decide what to put where. The OLAC members of the group favored this approach. However, it is unclear exactly how to fit this into RDA's existing structure.

There was no resolution during the CC:DA discussion. Interestingly, more than one person complained that they found the division between SOR and Credit information for videos difficult to understand and/or teach. These people expressed a preference for putting all the information in one place.

Since there were no clear solutions or specific questions for the JSC, OLAC and MLA were asked to work on developing a paper with a recommended solution and discussion questions.

### **Proposal on Color Content**

The current instructions for recording color content were essentially carried over from AACR2. RDA 7.17.1, the basic instruction for color content, says to use “color” if in color and to leave blank for black

and white or shades of gray. This would apply to illustrations in books and maps. The basic rule is followed by exceptions for several types of content, including still and moving images and 3-d forms. For all of these, you would record black and white if it applies. For still images and 3-d forms, you also record the specific colors up to two and only after that fall back on the general “color.”

The existing instructions lead to inconsistent results. This is most striking for still images where black and white images cataloged as still images would get “black and white,” but if they’re considered illustrations in a book, they would get nothing. This also seems contradictory in that illustrations are a type of still image.

A strawman proposal to collapse these all into one instruction (<http://alcts.ala.org/ccdablog/wp-content/uploads/2013/06/jsc1306.pdf>) was discussed at the CC:DA meeting. This resulted in a consensus that a single instruction would give better, more consistent results. Despite the fact that there are some outstanding issues, it was decided to try to put together a proposal for the JSC meeting in November. The proposal is now available at <http://www.rda-jsc.org/docs/6JSC-ALA-26.pdf>.

Two issues under discussion are of particular interest to OLAC members. One was the question of whether or not it is important to retain the current exception that allows the use of “grey scale” only for digital images. The proposal recommends keeping the exception.

The second is tinting and toning. The strawman proposal reflected a lack of understanding of what tinting and toning mean in the context of moving images and why those terms are included in the current instruction for recording the color of moving images (RDA 7.17.3.3). Definitions will be added to the RDA glossary to help prevent future confusion. There was some feeling that it is wrong to say “black and white (tinted)” when what the viewer sees is color. The question was also raised as to whether tinting and toning really belong in the section in chapter 3 on production methods rather than as part of the color element in chapter 7. The proposal that was submitted to the JSC recommends the use of the form “black and white (tinted)” in the color element, but raises the other questions for discussion.

### **Alternate corporate identities**

Adam Schiff encountered a case where a musical group performed under a fake name and was subsequently credited on a recording with this name. Research uncovered that this use of pseudonyms by musical groups is not uncommon. Famous bands sometimes perform in small venues under fake names, such as REM performing as Bingo Hand Job, or they will use pseudonyms for contractual reasons. However, there are no instructions in RDA for dealing with alternate identities for corporate bodies.

CC:DA felt that any new rules should be general enough to work with any type of corporate body, not just musical groups. A task force will be appointed to explore other types of corporate bodies with alternate identities (groups of artists, theatrical groups) and also families.

### **Report from the Task Force on Machine-Actionable Data Elements**

This task force continues their investigations into making the extent elements more machine-friendly and how to incorporate their Aspect-Unit-Quantity model into RDA. There was discussion at CC:DA about the implications of trying to incorporate the FRBR element “Extent of Expression” into RDA and which FRBR group 1 entity statements like “1 coin” refer to. Their discussion paper was submitted to the JSC and is available at <http://www.rda-jsc.org/docs/6JSC-ALA-Discussion-1.pdf>.

### **Report from the Task Force on Instructions on Recording Relationships**

One of the charges of this task force is to draft instructions for recording structured descriptions of relationships, such as contents notes and accompanying material statements. They are struggling with what it means to include elements describing manifestations in structured descriptions for related expressions or works or if it is even meaningful to have a structured description of a related work or manifestation.

## Library of Congress

### Liaison Report

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

**Personnel Changes.** Geraldine Ostrove, PSD cataloging policy specialist responsible for music, retired on May 31, 2013, after almost 28 years at the LC. Questions related to music cataloging policy should continue to be sent to PSD at [policy@loc.gov](mailto:policy@loc.gov). Libby Dechman, PSD senior cataloging policy specialist, is now responsible for subject and classification policy for music.

**SACO-At-Large Meeting.** The SACO-At-Large meeting at the Annual Conference will consist of a mini-workshop presented by Janis L. Young, a senior cataloging policy specialist in PSD, and entitled “Tips for Making Successful Subject Proposals Redux: Formulaic Fixes.” It will focus on the simple corrections that catalogers can make to their proposals before submitting them, thereby allowing for more expeditious approval. The meeting will be held on Sunday from 10:30-11:30 a.m. in the McCormick Place Convention Center, room E351.

**New Bibliographic Framework Initiative.** LC has made available for download two software code sets that convert current MARCXML records to BIBFRAME. The Library now also offers a demonstration area at <http://bibframe.org/demos/> including sample collections from the early experimenters, translated via the BIBFRAME pipeline. Two discussion papers, on BIBFRAME Authority and the BIBFRAME Annotation Model, were issued in May 2013 and are available at URL <http://bibframe.org>.

Interested colleagues may subscribe to the BIBFRAME electronic discussion list from the Website at <http://www.loc.gov/marc/transition>.

**Library of Congress-Program for Cooperative Cataloging Policy Statements.** The first update to the Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS) for 2013 was published in May. Eighty-three statements were addressed, primarily to record “PCC practice” in consultation with the PCC Standing Committee on Standards. The next LC-PCC PS update will be on July 9, and will in large part be related to changes to the RDA text approved by the Joint Steering Committee for Development of RDA at its November 2012 meeting. An additional update is planned for November of 2013.

**Programmatic Changes to the LC/NACO Authority File for RDA.** Changes to the LC/NACO Name Authority File known as “Phase 2” of the Program for Cooperative Cataloging (PCC) project to make certain headings acceptable under RDA, were begun on March 4 and successfully completed on March

27, 2013. A total of 371,942 name authority records were changed and redistributed to NACO nodes and appropriate Cataloging Distribution Service subscribers. The changes were made to LC's master copy of the LC/NACO authority file using programs originally developed under the auspices of the PCC Acceptable Headings Implementation Task Group (PCCAHTG) by Gary Strawn of Northwestern University. The primary purpose of phase 2 was to update (and convert to RDA when possible) records that had certain predictable characteristics and were susceptible to machine manipulation. For details on the types of changes made to headings, see the website of the PCCAHTG at <http://files.library.northwestern.edu/public/pccahitg>, or a summary of those changes at [http://www.loc.gov/aba/rda/pdf/lcnaf\\_rdaphase.pdf](http://www.loc.gov/aba/rda/pdf/lcnaf_rdaphase.pdf).

The same programmatic changes made to headings in authority records also needed to be applied to headings in bibliographic records in LC's catalog. Changes to bibliographic records began on April 8, after the completion of changes to authority records. The changes were completed on June 10--668,748 records were updated.

**Revisions to LCSH Due to RDA Phase 2.** In mid-April PSD finished a project to update LCSH headings affected by RDA Phase 2, i.e., those headings that are printed in LCSH but established in the name authority file. The project included personal, corporate, and conference names, as well as titles and geographic headings. Phrase headings and subdivisions that are based on names or titles (e.g., **Food in the Koran; Future life—Koranic teaching**) were revised, as were headings for temporary exhibition buildings (which are qualified by the name of the exhibition, e.g., **Cyclebowl (Expo 2000, 2000, Hannover, Germany)**). Revisions to the headings for treaties have been postponed indefinitely pending PCC discussions.

A list of all of the headings that were revised as part of this project may be found at <http://www.loc.gov/catdir/cpsd/subjects-RDA-changes.html>.

At this time, PSD is not planning to revise those LC subject headings that include abbreviations that are not permitted in RDA, which chiefly appear in a subfield \$y (e.g., **Egypt—History—Early Dynastic Period, ca. 3100-ca. 2686 B.C.**). Proposals to make that kind of revision will not be accepted.

**Violoncello.** Over 740 subject authority records that refer to the violoncello were revised in April 2013 and now use the terminology "cello." LC's bibliographic records were updated programmatically as part of the RDA Phase 2 bibliographic changes.

**Fictitious and Legendary Characters, and Animals with Proper Names.** Historically, headings for fictitious and legendary characters and animals with proper names have been established as subject headings in LCSH. With RDA, these entities can now be considered creators or contributors to works. According to the current LC-PCC Policy Statements, when a fictitious or legendary character, or named animal, is a creator or contributor, a name authority record should be made *in addition to* the subject heading.

That instruction will change with the July 9, 2013 update to the RDA Toolkit. Beginning on that date, headings for individual fictitious and legendary characters and individual animals with proper names will be established only in the name authority file using RDA instructions. The RDA heading will be valid for use as a subject heading. Proposals to establish new LC subject headings for individual characters and individual animals with proper names will not be accepted. Existing LC subject headings may continue to be assigned as subject headings. LCSH proposals for groups of fictitious characters (e.g., Hardy Boys, Teenage Mutant Ninja Turtles) will continue to be accepted since they cannot be established as descriptive access points at this time.

The new policy will state that a name authority record should be created if an individual character or an animal with a proper name is needed for the descriptive access point. Optionally, catalogers may create a name authority record for any individual character or animal with a proper name encountered during the course of their regular cataloging duties, even if it is needed only for subject cataloging. In either case, if an LCSH authority record exists, SACO libraries should make and submit a proposal to cancel the subject heading; libraries that are not in the SACO program should request PSD ([policy@loc.gov](mailto:policy@loc.gov)) to create the proposal.

A project to transition all individual character and named animal headings from LCSH will be conducted as resources are available. Catalogers in PCC libraries are requested to refrain from unilaterally undertaking local projects to convert the LC subject headings to name headings in a wholesale manner. Workload and staffing issues do not permit PSD to process the number of proposals that such projects would generate. However, institutions wishing to undertake such a project may contact the Coop Section at [saco@loc.gov](mailto:saco@loc.gov) and the request will be considered.

**Cataloging Publications.** LC will cease printing new editions of its subject headings and classification schedules, and other cataloging publications. Instead, LC will provide free downloadable PDFs of these titles. For users desiring enhanced functionality, LC's two Web-based subscription services, *Cataloger's Desktop* and *Classification Web*, will continue as products from the Cataloging Distribution Service (CDS).

In 2012, LC conducted an extensive study on the impact and opportunities of changes in the bibliographic framework and the technological environment on the future distribution of its cataloging data and products. LC's transition from print to online-only publication for cataloging documentation is a response to a steadily declining customer base for print and the availability of alternatives made possible by advances in technology. This shift will enable the Library to achieve a more sustainable financial model and better serve its mission in the years ahead.

Beginning July 1, 2013, print publications that are currently sold through CDS will become available as free, downloadable PDFs through LC's Acquisitions and Bibliographic Access Directorate website at <http://www.loc.gov/aba/>. Because all of the content cannot be made available simultaneously, the retrospective titles will be phased in.

Print editions of already-published titles, including the just-released 35<sup>th</sup> edition of the six-volume *Library of Congress Subject Headings*, will be available from CDS until inventory is depleted

(<http://www.loc.gov/cds/>). In addition, the *Subject Headings Manual*, Update No. 2 and a new edition of the *Classification and Shelving Manual* are currently in production for 2013 release in print. The most up-to-date source for subject headings and classification data, and other cataloging documentation, remains *Cataloger's Desktop* and *Classification Web*.

***Classification and Shelving Manual.*** The *Classification and Shelving Manual* (CSM) was written in the 1980s and reflected the AACR2 environment. PSD has now completed its review of the CSM in light of RDA instructions, and also took this opportunity to examine the classification and shelving policies in a more general way. Some exceptions to general principles were removed, and policies were otherwise simplified where possible. Revisions to the instruction sheets that were most heavily impacted by the changes have been posted in PDF form on ABA's website at [http://www.loc.gov/catdir/cpsocsm\\_instruction\\_sheets.html](http://www.loc.gov/catdir/cpsocsm_instruction_sheets.html). They are: F 175 (Editions); F 275 (Biography); F 603 (Government Documents); F 632 (Literary Authors); F 633 (Literary Authors: Subarrangement of Works); F 634 (Literary Collections); G 100 (Filing Rules); G 140 (Dates); G 145 (Editions); G 150 (Translations/Texts in Parallel Languages); G 220 (Corporate Bodies); G 230 (Conferences, Congresses, Meetings, Etc.); and G 340 (Criticism/Commentaries).

The PDFs on the website supersede the instructions on *Cataloger's Desktop* until November 2013, when *Desktop* will be updated. PSD also plans to publish a new print edition of the CSM in the fall.

***Subject Headings Manual.*** Review of the *Subject Headings Manual* (SHM) in light of RDA is ongoing. The fall update package will incorporate all of the RDA-related changes as well as edits that are made in the normal course of events (e.g., revisions to lists of free-floating and pattern subdivisions; policy clarifications). The revisions will appear in *Cataloger's Desktop* 2013 Issue 4 (November 2013).

The SHM will be the first of the PSD-maintained cataloging manuals to be freely available online in PDF form and will be available on or about July 1 (the instruction sheets will be dated June 2013). The July 1 "free release" will be current through update number 1, 2013. The freely available instruction sheets will be updated as necessary.

***Moving Image Genre/Form Project.*** PSD has begun a project to revise bibliographic records for moving image works. Terms from the *Moving Image Genre-Form Guide* (MIGFG) are being replaced with terms from *Library of Congress Genre/Form Terms for Library and Archival Materials* (LCGFT).

Effective in May, PSD has declared a moratorium on proposals for "derivative" moving image terms that are based on literary forms (e.g., **Filmed monodramas**; **Televised plays**). Since literature terms have not yet been added to LCGFT, the authorized "base" term has not yet been determined (e.g., *Plays v. Drama* or *Dramas*). The derivative term should reflect the literature term, and adding yet more derivative terms increases the likelihood that a significant clean-up project will be required. In addition, until the literature terms are approved it is difficult to determine which concepts should be represented



in pre-coordinated strings (e.g., **Filmed plays**) and which should be post-coordinated instead (e.g., **Filmed plays** assigned with **Passion plays** instead of **Filmed passion plays?**).

Previously approved derivative terms remain valid for use during the moratorium, and the moratorium does not apply to proposals for film, television program, and radio program terms that may parallel literary genres (e.g., **Science fiction films**; **Western television programs**; **Adventure radio programs**).

**Music Genre/Form and Medium of Performance Projects.** The Music Library Association (MLA) is continuing to work with PSD to develop LCGFT terms for music, as well as the *Library of Congress Medium of Performance Thesaurus for Music* (LCMPT). Geraldine Ostrove, PSD's coordinator of the music project, retired on May 31, 2013. Janis L. Young, a senior cataloging policy specialist in PSD, has assumed responsibility for the projects.

## **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 June 2013 MARBI meetings in Chicago, Illinois. If you would like to see the complete list of topics discussed, you can find them at: <http://www.loc.gov/marc/marbi/>.

This was the final meeting of MARBI in its current configuration. Starting at ALA Midwinter 2014 MARBI will become the MARC Advisory Committee (MAC) without the oversight of the three ALA divisions. For OLAC there will be no change during this transition as I will continue to represent OLAC on this advisory committee. The major change for the liaisons is that we will become voting members of the Committee rather than just advisors. Proposals and discussion papers continue to be submitted to the Library of Congress and the MAC will continue to meet twice a year at the Annual and Midwinter meetings of ALA. As we work towards replacing MARC with something new, the MAC will continue to make sure that MARC is the best it can be so we will be ready to make the leap to the new Bibliographic Framework.

#### **Proposal No. 2013-08: Defining Subfield \$7 in the 8XX Series Added Entry Fields in the MARC 21 Bibliographic Record**

This proposal is for use for the kind of cataloging done in Europe, mainly by the Germans who brought it to MARBI. It would only be interesting to you if you intended to use German cataloging.

#### **Proposal No. 2013-09: Defining Subfields for Qualifiers to Standard Identifiers in the MARC 21 Bibliographic, Authority, and Holdings Formats**

This proposal continues the precedent set by the approval of Proposal 2012-06 which added \$q to the 028 so that numbers in that field could be qualified as needed. This proposal was passed adding \$q to fields 015, 020, 024, and 027. Notice that the ISSN 022 field is not included. It was decided that at this time it is too complicated to change that field in any way.

#### **Discussion Paper No. 2013-DP-05: Defining Indicator Values for Field 588 Source of Description Note in the MARC 21 Bibliographic Format**

This discussion paper would add coding that would allow for display constants to be used for some of the more standard phrases used in the 588, especially for serials and electronic resources, like "description based on:". There was general agreement that this would be a time saving measure so it will come back as a proposal at the Midwinter 2014 meeting.

## **Discussion Paper No. 2013 DP-06: Defining New Field 388 for Chronological Terms in the MARC 21 Authority Format**

In the ongoing process of defining new MARC fields for the implementation of genre/form terms, this discussion paper looked at the ways of addressing the need for a place for chronological terms in MARC. The proposed new 388 field in Authority records would allow the original date of creation to be supplied using the LCGFT terms in records for works and expressions. As an example take the authority record for the novel *Anne of Green Gables*, the terms “Nineteen-o-eight, A.D.” would be added as the date of creation for this work. The 046 would continue to be used for the numerical representation of data but it was decided that it would also be good to have the term. In addition, this field would be very helpful for indicating the original date of aggregations. This paper will come back as a proposal at Midwinter.

## **OLAC/MOUG Liaison Report**

Submitted by Mary Huisman  
University of Minnesota

MOUG has entered into an agreement with EBSCO to include the *MOUG Newsletter* in its library/music products. Current issues plus selected backfile issues were sent to EBSCO.

Presentations from the 2013 annual meeting in San Jose, California are available at the MOUG website (<http://www.musicocclusers.org/mougmeetings/2013meeting/2013presentations.html>)

### **Annual Meeting 2014**

The 2014 annual meeting will be held on February 25-26, 2014 in conjunction with the Music Library Association meeting in Atlanta, Georgia. More details will be forthcoming!

## **CALL FOR CANDIDATES - OLAC OFFICES**

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

For those who wish to nominate an OLAC colleague, please be sure that person is willing to serve.

### **OVERVIEW OF DUTIES**

#### **VICE PRESIDENT/PRESIDENT ELECT**

This office is elected annually, with a term beginning in the summer following the ALA Annual Conference, and serves four years: a one-year term as Vice-President/President Elect, followed by one year as President, one year as Immediate Past-President, and one year as Past-Past President. The Vice President performs all duties delegated by the President and presides at meetings and other functions when the President cannot attend. The Vice President is expected to attend the OLAC and Executive Board Meetings while in office, and is responsible for any OLAC-sponsored programs held at ALA Annual. The Vice President chairs the OLAC Research Grant Committee.

The OLAC President presides at all OLAC Membership and Executive Board Meetings. The President will submit quarterly reports for the OLAC Newsletter, and works closely with the OLAC Executive Board in guiding the operations of the organization.

The Immediate Past President serves as Chair of the Nancy B. Olson Award Committee, and as a member of the OLAC Executive Board. The Past President may also be asked to take on an additional project which forwards OLAC's goals. The Past-Past President serves as the Chair of the Elections Committee.

#### **SECRETARY**

The incumbent in this position will serve a two year term. In this case the term will start after ALA Annual 2014 and will continue until the end of ALA Annual 2016. The Secretary records the minutes of the OLAC Executive Board, Membership, and CAPC meetings. They will also maintain and disseminate the roster of the Executive Board, past OLAC Presidents, and OLAC appointees. They are responsible for maintenance of the OLAC Handbook. They serve on OLAC's Executive Board.

Members of the Executive Board receive a \$100 stipend for attending OLAC Membership meetings during ALA conferences. Anyone who wishes to run for either of these positions should submit a letter as described above. The deadline is December 31, 2013.

Please submit all letters and supporting materials electronically to:

Amy K. Weiss  
Chair, OLAC Elections Committee  
[akweiss@fsu.edu](mailto:akweiss@fsu.edu)

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### **Call for an Outreach-Advocacy Coordinator!**

We have a great opportunity for an OLAC member to serve as our Outreach-Advocacy Coordinator. This is an appointed position on the OLAC Executive Board, and provides many opportunities for creativity and interaction with OLAC colleagues. The appointment would start as soon as possible.

The full description of the position is found in the OLAC Handbook, and copied below, but some of the current projects in the works for this position are: working with a graphic designer on the new OLAC logo design, developing and maintaining an OLAC presence in social media networks (e.g., Facebook, etc.), and creating new brochures or handouts to promote OLAC membership.

From the OLAC Handbook: "The OLAC Outreach-Advocacy Coordinator is responsible for promoting the purposes and objectives of OLAC and encouraging membership growth. This position also acts as a repository for fundraising data related to conference sponsorship and pursues conference donations in cooperation with the Conference Planning Committee. The Outreach-Advocacy Coordinator is an ex officio member of the OLAC Executive Board and is required to attend at least one Board meeting per year, consult with the board and contribute regular reports to the OLAC Newsletter. At the Coordinator's request and the Board's discretion, task forces may be appointed as needed. A stipend of \$100 will be given for each Board meeting attended. This is an appointed position with a term of office that runs two years with the possibility of reappointment upon satisfactory performance for up to a total of six years."

If you are interested in this opportunity, please contact me (Liz Miller; [eamiller@nmsu.edu](mailto:eamiller@nmsu.edu)).

I look forward to hearing from you!

## NEWS AND ANNOUNCEMENTS

T.J. Kao, Column Editor

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### **ALCTS webinar: Using Open Refine to Update, Clean up and Link your Metadata to the Wider World**

This ALCTS webinar will introduce Open Refine (formerly Google Refine) as a tool not only to solve problems, such as typos, extra space, punctuation errors, and inconsistent capitalization, but also other data transformation tasks, including reformatting and connecting to linked data sources. Attendees will also learn about a real example of using this tool for database maintenance.

This one-hour webinar begins at begin at 11am Pacific, noon Mountain, 1pm Central, and 2pm Eastern time on September 18, 2013.

Presenters include Sarah Weeks, the Head of Tech Services for the St Olaf College Libraries, and Elissah Beknell, a Zine Librarian and Instructor at Minneapolis Community & Technical College Library.

Registration Fees: ALCTS Member \$43 ; Non-member \$59 ; Group rate (members/non-members) \$99/\$129 ; International \$43

For additional information and access to registration links, please go to the following website:  
<http://www.ala.org/alcts/confevents/upcoming/webinar/091813>

ALCTS webinars are recorded and registrants receive a link to the recording shortly following the live event.

For questions about registration, contact ALA Registration by calling 1-800-545-2433 and press 5 or email [registration@ala.org](mailto:registration@ala.org). For all other questions or comments related to the webinars, contact Julie Reese, ALCTS Events Manager at 1-800-545-2433, ext. 5034 or [alctsce@ala.org](mailto:alctsce@ala.org).

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**The Metadata (R)evolution: Transformative Opportunities**  
**A Collective Insight Event Hosted by Johns Hopkins University**

Will the future of metadata be an evolution, revolution, or both? From serving as a descriptor of items and collections to now including people and places, the progression and repurposing of metadata is an exciting frontier, full of opportunities and challenges. Join us in person on 18 September at Johns Hopkins University (or virtually via live-streaming video) as we explore the powerful potential of metadata from a variety of insightful perspectives:

To register: [http://www.oclc.org/en-US/events/2013/CollectiveInsightSeries/CollectiveInsight\\_JohnsHopkins\\_130918.html](http://www.oclc.org/en-US/events/2013/CollectiveInsightSeries/CollectiveInsight_JohnsHopkins_130918.html)



## IN THE SPOTLIGHT...

with TJ Kao

**Bojana Skarich, Column Editor**

TJ Kao doesn't shy away from challenges. Rather, he views problems as opportunities. For example, while working at his last job at Multnomah County Public Library, in Portland, Oregon, he taught himself how to use MarcEdit. This software allows you to manipulate large quantities of bibliographic records at once, and is quite powerful for rapid changes. The cataloging department where he worked was desperate to process their electronic book records in this way, and because of his willingness to learn and apply these skills in using MarcEdit, TJ was able to solve the crisis within a week. He counts this experience as one of his triumphs, and it has allowed him to build his self-confidence and knowledge base.



Photo courtesy: T.J. Kao

Having worked in both Washington and Oregon, TJ now lives and works on the East Coast, in New Haven, Connecticut. He works as the Chinese Technical Services Librarian at the East Asia Library, International Collections and Research Support, Yale University. He started this job in July, and is still learning the local cataloging workflows, which include relearning the Library of Congress Classification system. (As a Dewey-trained cataloger myself, I remember making the switch to LCC, and it took some time!) Communicating regularly with his supervisor and colleagues has helped him make a smooth transition. TJ is currently working on Yale's Chinese collection backlog, with materials ranging from contemporary print monographs and serials, to rare books dating at 1000 B.C. TJ's language expertise in Chinese, Vietnamese and Japanese gives him the opportunity to enhance access to these unique international collections.

One of the most interesting collections that TJ cataloged was the gay liberation collection at the Archives and Special Collections at the University of Connecticut Libraries. This collection included numerous erotic materials, and he often had to do research on the internet to find the necessary details to create accurate bibliographic records. It was a humorous situation, to be viewing pornographic materials at work, and he jokingly said that he sometimes wondered if the university systems personnel would reprimand him for his "suspicious" research activities. When asked what he most enjoys about his work as a librarian, TJ says that it is his colleagues, and the support he gets when he has a question or needs feedback. He says that he is "constantly inspired by the ideas we discuss," and is impressed by their knowledge of and devotion to their work. "It is indeed a great work environment for me," he says.

TJ's path to becoming a librarian came by chance. While studying for his first Master's degree in at the University of Washington, he took a job at the university library to supplement his income. After working there a few months, he found that he greatly enjoyed the work he was doing. After receiving encouragement from other staff members, he sent in an application to the iSchool at the University of Washington, and was accepted. He has been working in libraries for several years since that time. TJ says, "I haven't thought about switching my career to something else." Clearly, it was the right decision!

He first heard about OLAC while he was a student in library school. A mentor recommended OLAC as a great resource for audio-visual material catalogers. As of December 2012, TJ serves as the editor for the News and Announcements column for the OLAC Newsletter. His quarterly column documents cutting-edge cataloging and metadata technologies and resources for the audio-visual cataloging community. He says that as a listserv lurker, this job suits him well.

When asked if he had a word of advice for new librarians, TJ says that it's important to take initiative in regards to your professional development. "Instead of waiting for other people to tell you what you need to know, you should always be eager to seek out what's new out in the field. Once you have sufficient knowledge, you should try to use it in your work," he says. This strategy has proven useful at his current job, where he needs to familiarize himself with several local cataloging practices and policies, and to effectively navigate the organizational structure. In the end, this is what makes the job interesting: "One nice thing about the librarianship is you can always find something new and useful to learn," TJ remarks. I definitely agree with him.

## REVIEWS

**Christina Hennessey, Column Editor**

### **XML for Catalogers and Metadata Librarians**

by Timothy W. Cole and Myung-Ja K. Han

*XML for Catalogers and Metadata Librarians* “is aimed at helping current and would-be catalogers and metadata librarians progress beyond a bare surface-level acquaintance with XML. [The authors] assume that readers come to this book with some prior knowledge of descriptive cataloging traditions and/or descriptive metadata basics ... [The authors] do not assume any prior knowledge of XML” (p.xii). Readers are encouraged to “play along” as they read, using an XML editor and XML viewer of their choice. Those can be as simple as Microsoft Notepad and Firefox, which are what I used. More powerful software programs, including MarcEdit and the oXygen XML Editor, are also discussed.

Both authors have published extensively in the fields of descriptive metadata, library interoperability, and library technology. Cole and Han are frequent collaborators, having worked together on numerous articles and presentations from 2008-2013. Cole is the co-author of *Using the Open Archives Initiative Protocol for Metadata Harvesting* (with Muriel Foulonneau, 2007), which is also a part of Libraries Unlimited’s Third Millennium Cataloging series. Han has contributed a chapter to *Library Automation and OPAC 2.0: Information Access and Services in the 2.0 Landscape* (ed. Jesus Tramullas, 2012), titled “XML in Library Workflows”.

*XML for Catalogers and Metadata Librarians* is organized into four parts: XML terminology and the basic concepts of XML (“Introduction and Overview”, chapters 1-3); how XML can be used to improve efficiency and interoperability in resource description (“Structure and Metadata in XML”, chapters 4-6), the creation and trouble-shooting of XML records (“Authoring and Validating XML”, chapters 7-9); and advanced techniques (“Metadata Crosswalks, XML, Transformations, and RDF XML”, chapters 10-13). Each chapter concludes with “Questions and Topics for Discussion”, “Suggestions for Exercises”, “Notes”, and “References”. There are 14 case studies in the final 10 chapters of the book, with somewhere between one to three case studies per chapter. Many of the case studies are drawn from the authors’ work at the University of Illinois and Urbana-Champaign’s University Library.

Cole and Han do an admirable job of explaining XML, favoring thoroughness over simplicity and description over interpretation. Their two initial definitions of XML should provide some idea of their writing style: “XML is an open standard that is used to serialize, that is, to encode and describe structured data and to facilitate the maintenance, organization, sharing, and reuse of these data by computer applications” (p.5), then “By delineating unambiguously the extent (the boundaries) of semantic elements, labeling these elements, and exposing their hierarchical arrangement, XML helps to make explicit for the computer the intellectual structure of an information resource, which human readers infer intuitively from context, resource formatting, and training” (p.6). I needed to read these sentences more than once, in a quiet room, but retained more of them than I do from much library

literature. I also needed to read the book in its written order, and would not recommend skipping ahead until completing Chapter 3 (at least).

The individual chapter that may interest traditional catalogers the most is Chapter 4 (“MARCXML : Library Catalog Records as Structured Data”). That chapter discusses “the design of MARCXML as an extension of the original MARC framework for bibliographic description, noting the differences and similarities in how the framework is implemented in traditional MARC versus MARCXML and how these formats are now often used alongside each other” (p.68). Figure 4.6 (“Example of MARCXML record”) should make sense to any cataloger. Basically, MARCXML transforms a MARC record by reformatting each individual MARC field into tags surrounding elements. The tags contain the original number of the MARC field and its indicators, and the elements contain the textual contents of the field. If the MARCXML document is both valid and well-formed, then it can be used and shared in ways that a MARC record of similar craftsmanship could not. The case studies in this chapter show how a cataloger could create MARCXML records for the Google Books Library Project and the HathiTrust.

The individual chapter that interested me the most is Chapter 5 (“Other Metadata Standards in XML: Dublin Core, MODS, and ONIX”). I still think of myself as a cataloger, but most of my current work is with new digital collections created from unique archival materials. I was pleasantly surprised to see that Case Study 5.1 (“Dublin Core Metadata in CONTENTdm”) described something I do almost every day: creating original descriptive metadata, according to a local implementation of a metadata schema (Dublin Core), which will eventually pass through digital collection management software (CONTENTdm), before ultimately residing in a digital media repository (Ball State University’s DMR). I may not think or speak XML as a first language, but XML informs every step of that process. Furthermore, a “raw” view of this content in XML, and potential exports of this content in XML, were just a few clicks away. I will never be a computer programmer, but I am already a cog in an XML-compliant machine.

*XML for Catalogers and Metadata Librarians* is not light reading, but it is informative and practical. It does an excellent job placing XML within the historical context of library science, and showing how XML fits within the purview of catalogers and metadata experts. The book is incredibly well-organized, as well it should be – this is a work about a markup language that aims to structure data in an unambiguous and maximally-useful way, written for professionals who accept these same values as articles of faith.

*XML for Catalogers and Metadata Librarians* is strongly recommended for all technical services professionals, especially those with a desire for professional development or career reinvention. I may not directly use what I learned in this book every day, but I now have a much better understanding of the principles and technology that underlie the internet, EADs, OAI-PMH, etc.

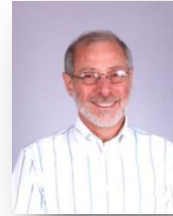
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**OLAC CATALOGER'S JUDGEMENT:**

**QUESTIONS AND ANSWERS**

**Compiled by Jay Weitz**



**Kit Mess**

**Question:** I am currently working on a bibliographic record for a kit. I think this may be the first time I've actually created a record for a kit. I'm using the Mixed Materials workform, with Type "o". Every time I validate the record, or try to control the headings, the workform flips to Visual Materials. Is this a known bug, or am I doing something wrong?

**Answer:** The phrase "mixed materials" has always been somewhat misleading, at least in my mind. "Mixed materials" (Type "p") is intended for made-up collections in which no material type is predominant. The MARC 21 definition reads: "Used when there are significant materials in two or more forms that are usually related by virtue of their having been accumulated by or about a person or body. Includes archival fonds and manuscript collections of mixed forms of materials, such as text, photographs, and sound recordings. Intended primary purpose is other than for instructional purposes (i.e., other than the purpose of those materials coded as o (Kit))." "Kits" (Type "o"), on the other hand, are defined in MARC 21 as: "Used for a mixture of various components issued as a unit and intended primarily for instructional purposes where no one item is the predominant component of the kit. Examples are packages of assorted materials, such as a set of school social studies curriculum material (books, workbooks, guides, activities, etc.), or packages of educational test materials (tests, answer sheets, scoring guides, score charts, interpretative manuals, etc.)." If you choose "Visual Materials" rather than "Mixed Materials" and code the VIS fixed field correctly, you should validate without any problem.

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**Performance Enhancing Titles**

**Question:** I'm working on a collection of jazz CDs but am also interested in the question addressed more broadly. I've just done a "lock and replace" on WorldCat #45072747: "Lonnie Johnson \$h [sound recording] : \$b the unsung blues legend : the living room session / \$c Lonnie Johnson." The only changes I made were to add to the 505 second indicator "0" and subfields \$t and \$g. Would you

consider this to have been a valuable contribution to WorldCat, or at least one worth my taking the short period of time it took to do? I seem to be a minority of one among my cataloging colleagues in the view that, particularly for recordings such as this, it would be useful to be able to set up a local system to retrieve 505 subfield \$t under a search field defined as "title." I realize that is a separate issue about which you shouldn't be asked to advise directly, but it would inform my thinking on the subject to know if you value adding the information to a WorldCat record.

**Answer:** The debate about the value of so-called enhanced contents notes (using subfields \$t, \$r, and \$g rather than just subfield \$a) has been around since before those subfields were implemented two decades ago. Certainly, some local systems have taken advantage of the differentiated subfielding to apply special indexing to these fields. Indexing in WorldCat has done so, as well, as is explained a bit in BFAS in field 505 (<http://www.oclc.org/bibformats/en/5xx/505.html>) and as you can see in "Searching WorldCat Indexes under field 505 (<http://www.oclc.org/support/services/worldcat/documentation/searching/searchworldcatindexes.en.html>). Looking forward to the Linked Data future, it seems that enhanced contents notes have the potential to be more friendly to any post-MARC Bibliographic Framework. Plus, if we can judge by how RDA seems to prefer greater differentiation of data, enhanced 505s are right in tune with that. So I would add my vote to your minority in saying that such a 505 upgrade is a valuable contribution, not to mention forward-looking. That being said, I would also have to caution that the data in MARC Bibliographic 505 fields were never intended to be access points and all the MARC subfielding available can't really force them into being reliable access points. Obviously, there is no authority control at all applicable to the 505, not for composers or performers or titles, and without a lot of special manipulation of data, things such as initial articles in titles may get in the way. The best chance for consistent, reliable, and even authoritative access is to use the appropriate 7XX field for the situation.

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### Medium Raw

**Question:** When one catalogs a record for something with accompanying materials it seems appropriate for the subfield \$3 to be used in the 344, 346, and 347 fields (with subfield \$2 rda). But how about in the 33X fields, which use subfield \$2 rdacontent, \$2 rdamedia, \$2 rdacarrier, which seem to come from controlled vocabularies? The "Best Practices for Music Cataloging" draft gives examples accordingly, with the subfield \$3 only in the 344, 346, and 347 fields, and not in the 33X fields. For instance:

336 performed music \$b prm \$2 rdacontent

336 two-dimensional moving image \$b tdi \$2 rdacontent

336 text \$b txt \$2 rdacontent

[similar fields for rdamedia and rdacontent]

344 \$3 Audio disc \$a digital \$b optical \$g mono \$2 rda

344 \$3 Audio disc \$a digital \$b optical \$g stereo \$2 rda

346 \$3 Videodisc \$a laser optical \$b NTSC \$2 rda

347 \$3 Audio disc \$a audio file \$b CD audio \$2 rda

347 \$3 Videodisc \$a video file \$b DVD video \$e all regions \$2 rda

What do you think about the use of subfields \$3 in the 33X fields? I'd also welcome comments on the terms I'm using there in the 34X fields.

**Answer:** Presumably, subfield \$3 ("Optional" in the National Level Requirements at <http://www.loc.gov/marc/bibliographic/nlr/nlr3xx.html>) was defined in the 33X fields for this very purpose, when appropriate. In at least some cases, the use of subfield \$3 might appear to be redundant of the term in subfield \$a. (We need to keep in mind the distinctly different purposes of the two subfields to realize that any redundancy would be from a human perspective rather than from a machine perspective.) Keep in mind also that the raw 33X fields are not necessarily intended to be displayed as they are to users, but may instead be used in combination with other data to generate appropriate icons, and so on, in a public display. Subfields \$3 don't have a controlled vocabulary, so you can probably express things as you see fit in the specific circumstance. The placement of subfield \$3 within the field and the upper or lower casing of the text found in the subfield might be appropriate for the best practices document to deal with, in the absence of any other guidance.

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### Separate Records 'R' Us

**Question:** I need some advice about whether I should create a new record for a DVD title. There's already a record in the database for the DVD-R version of a title. I definitely have the DVD version of this title. Should I be creating a new record for the DVD? Everything else matches, as far as I can tell, with the DVD-R version of the title. I have the DVD version of "My Brooklyn." The DVD-R is cataloged on



#827716340. I looked to "When to input a new record" for guidance and under the instructions for 538 it gives this advice: "VIS. Differences in video system (e.g., Beta vs. VHS) justify a new record." Does this include the difference between a DVD and a DVD-R? I would hate to create a new record if I don't need to. But, I'd be happy to create one, if I should.

**Answer:** In a case such as this, you always have the option of locally editing an existing record to account for the differences in your copy. DVD-Rs are essentially the equivalent of "on-demand" reproductions. As such, a separate record for the traditionally published DVD is justified, but you should not feel compelled to create one.

## NEWS FROM OCLC

Compiled by Jay Weitz



### General

#### **OCLC Completes Major Technical Upgrade of Core WorldCat Infrastructure**

On 2013 June 6, OCLC completed the development work to convert the underlying structure for its WorldCat database to Apache HBase, a distributed platform in use by many global information providers, including Facebook, Adobe, and Salesforce.com. This marks the conclusion of a significant technical update to the WorldCat database of more than 300 million library records and more than 2 billion library holdings that will offer new options for data analysis and faster service to libraries and their users. The Apache Hadoop software collection is a framework that allows for the distributed processing of large data sets across clusters of computers. HBase is a top-level Apache Software Foundation project built on Hadoop that provides major data handling improvements for these very large datasets. OCLC WorldShare applications for library management, resource sharing, metadata and discovery rely on access to a variety of large and growing datasets, including the WorldCat database. The sheer scope of OCLC members' cooperative data is one driver of this change, as HBase provides better handling of very large datasets. In addition, HBase and Hadoop allow OCLC to represent library information in new ways for use in e-content and linked data systems while providing more consistent, reliable, and faster service to libraries and their users. Hadoop provides these enhancements, in part, by scaling data services across hundreds or even thousands of computers, each with several processor cores. This efficiently distributes large amounts of work across a set of machines, allowing for greater flexibility, speed, and dependability. OCLC is running Hadoop across more than 150 servers in three clusters. This technology has already had an impact on OCLC functionality and services. The recent addition of linked data elements to WorldCat.org relies on the features available in Hadoop. Also, the new WorldShare Metadata Collection Manager service takes advantage of the data handling benefits of its distributed infrastructure.

#### **Public Libraries Partner with Redbox and OCLC to Pilot Community Initiative**

"Outside the Box" was developed and funded by Redbox in order to provide communities with a variety of resources to produce fun and meaningful entertainment experiences. Through the program, Redbox provides event resources as well as local marketing support to participating communities, while program partners OCLC and the world-recognized experts at the Project for Public Spaces lend dedicated project management and place-making expertise. Each participating community is able to select unique materials to support its events, such as outdoor movie screens, blankets, tents, tables and seating, stages, or licensed access to movies or games. With libraries leading the local activities, "Outside the Box" kicks off in five communities in 2013. This summer and fall each community will design and host entertainment events ranging from arts festivals to concerts, outdoor movies and more. Chosen based

on key characteristics such as geographic and ethnic diversity, median household income, and local leadership, the five partner communities and libraries include:

- Billings, Montana (Billings Public Library).
- Chicago, Illinois (West Town Branch of the Chicago Public Library).
- Columbia, South Carolina (Richland Library).
- Columbus, Georgia (Chattahoochee Valley Libraries).
- Cuyahoga County, Ohio (Cuyahoga County Public Library).

Details about the Outside the Box programs can be found on the OCLC website at <http://www.oclc.org/go/en/outsidethebox.html>.

## **Cataloging and Metadata**

### **OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2013**

OCLC has now implemented the changes related to the OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2013, which are detailed in OCLC Technical Bulletin 262 (<http://www.oclc.org/support/services/worldcat/documentation/tb/262.en.html>), now available. This installation includes MARC 21 Update No. 15 (dated September 2012), code list additions and changes published chiefly since May 2012, and other suggestions from WorldCat users and OCLC staff. Many of these elements, including those from MARC 21 Update No. 15, are related to Resource Description and Access (RDA). Among the points of interest:

- In Bibliographic Scores 008/20 and 006/03 (FMus), existing codes “c” (Accompaniment reduced for keyboard), “d” (Voice score with accompaniment), and “h” (Chorus score) have been “re-described” and a new code “k” for “Vocal score” has been defined.
- In Bibliographic field 024, both old-style (ten-character) ISMNs and new style (thirteen-character) ISMNs may now be input and coded correctly.
- In Bibliographic field 028, new subfield \$q for “Qualifying information” has been validated.
- Bibliographic fields 261 (Imprint Statement for Films (Pre-AACR1 Revised)) have been converted to field 260 and are no longer valid for input.
- Bibliographic fields 262 (Imprint Statement for Sound Recordings (Pre-AACR2)) have been converted to field 260, to the extent that was safely possible. Field 262 is no longer valid for input. Due to incorrectly coded or contradictory data, many 262 fields remain unconverted. Any unconverted or incorrectly converted 262 fields should be corrected when possible or reported to OCLC via [bibchange@oclc.org](mailto:bibchange@oclc.org).
- In Bibliographic field 511, long-obsolete First Indicators blank, 2, and 3 have been converted and invalidated.
- New Bibliographic and Holdings fields 883 for “Machine-Generated Metadata Provenance” have been validated, but are intended for future use. Please do not use field 883 at this time.
- Authority field 368 (Other Attributes of Person or Corporate Body) has been renamed; existing subfield \$c (Other designation) has been redefined; and new subfields \$d (Title of person), \$s (Start period), \$t (End period), \$u (Uniform Resource Identifier), and \$v (Source of information) have been validated. NACO participants should not input these new subfields in the Authority 368 field until an announcement regarding their use is made by the Program for Cooperative Cataloging.

- New indexes will be implemented at a future date, including several involving Dewey Decimal Classification data in Bibliographic fields 082, 083, and 085; several to account for recently-implemented subfields in Bibliographic field 502 (Dissertation Note); and an Action Note Authorization index for both Bibliographic and Holdings fields 583 subfield \$f. There will also be some additions to various existing indexes. OCLC will announce availability via logon Messages of the Day, Connexion News, and the OCLC-CAT discussion list.

## **Bibliographic Formats and Standards, RDA Update**

For some months now, OCLC's WorldCat Quality Management Division has been planning and implementing a project to incorporate "Resource Description and Access" (RDA) practices, references, and examples into OCLC's "Bibliographic Formats and Standards" (BFAS) (<http://www.oclc.org/bibformats/en.html>). OCLC's recent migration to a new content management system has now allowed this effort to begin. We are now in the process of incorporating the changes to BFAS that were part of the OCLC-MARC Updates 2012 and 2013, which were documented in Technical Bulletins 261 (<http://www.oclc.org/support/services/worldcat/documentation/tb/261.en.html>) and 262 (<http://www.oclc.org/support/services/worldcat/documentation/tb/262.en.html>). The updates to BFAS resulting from these two sets of changes have now begun and will continue through coming weeks. We have simultaneously begun the larger task of reviewing BFAS in its entirety. Policies will be updated, links to "Searching WorldCat Indexes" (<http://www.oclc.org/support/services/worldcat/documentation/searching/searchworldcatindexes.en.html>) will be added, occasional references to RDA and the Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PSs) will be incorporated, and some examples will be updated and others added to reflect RDA practices. This is a huge undertaking and will be happening gradually over time. In the meantime, we have brought together on the OCLC "About RDA" page (<http://www.oclc.org/rda/about.en.html>) links to LC, OCLC, and other documentation about RDA. These include the current "OCLC RDA Policy Statement" (<http://www.oclc.org/rda/new-policy.en.html>) and a recorded Webinar that takes an in-depth look at that policy statement ([http://www.oclc.org/worldwide/en\\_us/events/2013/rdawebinar04-1713.html](http://www.oclc.org/worldwide/en_us/events/2013/rdawebinar04-1713.html)). Many cataloging communities (including AV, music, maps, etc.) are working on their own RDA "best practices" documents and we will be providing links to those as they become available. As part of these changes, the PDF version of BFAS has been discontinued. There are two main reasons for this decision:

- 1) The PDFs had extremely low usage rates. As an example, the most heavily used PDF covered the OXX fields and was accessed 3 times per day on average from February 2008 to February 2013. In contrast, the OXX HTML files were accessed 1,323 times per day on average over the same five-year period.
- 2) The maintenance of two formats exerted a significant drag on the speed with which updates could be made.

As a result, we anticipate more timely updates and corrections from now on. In short, we have begun our work to bring BFAS into the world of RDA. You will be seeing changes regularly as the BFAS Update Project progresses. Please send any questions or concerns to [AskQC@oclc.org](mailto:AskQC@oclc.org).

### **300 Millionth Bibliographic Record Added to WorldCat**

The record describes an article, "Wirtschaftsrecht im Internet" ("Business Law for the Internet") from the publication *Betriebs Berater*. The record was created on 2013 June 7 and was contributed by the European Commission Central Library. The record was added as part of the library's first retrospective batchload effort. This single institution load resulted in a total of 475,869 holdings being set, and 301,991 new bibliographic records were added. Reflecting the increasingly global nature of WorldCat, the record describes an article in a German journal with subject cataloging in French. The European Commission's Central Library is one of the main sources of information on European Union policies. Its collections are built on the holdings of the ECSC High Authority, and those of the EURATOM and EEC Commissions. Collections include official EU publications, publications from many intergovernmental organizations, commercial, academic, and government publications, as well as selected periodical articles.

### **30 Millionth Digital Collection Gateway Record Added to WorldCat**

A record for an article from the International Food Policy Research Institute (IFPRI) is the 30 millionth record to be harvested to the WorldCat database via the WorldCat Digital Collection Gateway, on 2013 May 26. The WorldCat Digital Collection Gateway provides institutions with OAI-compliant repositories, like IFPRI, with a free, Web-based tool that makes it possible to self-harvest the metadata of their unique digital content to WorldCat to gain broader visibility. The WorldCat record links to the open-access article, "Diversification in Indian Agriculture toward High-Value Crops: The Role of Small Farmers," written by two IFPRI researchers, P.K. Joshi, and Devesh Roy, and partners Amit Thorat and Pratap Singh Birthal. It was published in the *Canadian Journal of Agricultural Economics*.

### **New WorldCat Metadata API Enables Building of New Application**

OCLC has launched the new WorldCat Metadata API that will enable member libraries and partners to build and share applications on the OCLC WorldShare Platform for libraries to catalog their collections in WorldCat. The WorldCat Metadata API supports a variety of cataloging functionality for libraries to catalog their collections in WorldCat. Libraries will be able to create applications with the new API to add new and enrich existing WorldCat bibliographic records, and maintain WorldCat institution holdings and local bibliographic data. Libraries can continue to catalog their collections in WorldCat using OCLC-built applications such as Connexion and the upcoming WorldShare Metadata Record Manager, or they can create new applications using the WorldCat Metadata API to manage their cataloging workflows. The WorldCat Metadata API is the latest in a series of APIs released by OCLC on the OCLC WorldShare Platform, a global, interconnected Web architecture that supports OCLC's cloud-based services and applications, and provides flexible access to library data through APIs and other Web services. Librarians and developers can use these tools to innovate together to build and share solutions for libraries that streamline and enhance library workflows. The WorldCat Metadata API complements the WorldCat Search API. These Web services provide read and write access to libraries' bibliographic and holdings data. A number of library- and partner-built applications already use the WorldCat Search API and have been well-received by the OCLC membership. Visit the OCLC Developer Network at

<http://oclc.org/developer/services/worldcat-metadata-api> to learn how libraries can get started using the new WorldCat Metadata API.

## **Discovery and Reference**

### **WorldCat.org and WorldCat Local Sites Now Available in Czech**

The addition of a Czech language interface joins the other nine that are currently available: Chinese, Dutch, English, French, German, Italian, Korean, Portuguese, and Spanish. WorldCat.org is the world's largest library catalog, and now helps Czech language speakers find more library materials online on the open Web. WorldCat Local is a webscale discovery solution for libraries and library groups that delivers single-search-box access to more than 1.267 billion items from your library and the world's library collections. It connects people to all your library's materials—electronic, digital, and physical—as well as to built-in delivery services to get them what they need. There are more than 1.5 million records for Czech language materials in WorldCat, with many more additional Czech language items available for WorldCat Local subscribers through the WorldCat central index.

### **OCLC and EasyBib Create *MLA Citation Basics* eBook**

OCLC has expanded their partnership with ImagineEasy Solutions, the creators of EasyBib, to provide a series of new quick-reference resources for library staff members, to help improve student information literacy and cite resources correctly. The first of these quick-reference resources is a citation eBook, *MLA Citation Basics* for MLA 7th Edition. Library staff members can use the eBook in the classroom or provide as a handout for students and faculty. The eBook will cover:

- MLA Citation Fundamentals.
- MLA Examples of Popular Sources.
- MLA Web Citation Rules.
- MLA Parenthetical Citations.

EasyBib and OCLC plan to develop and distribute additional eBook resources in the future. OCLC is the exclusive provider of EasyBib Library Edition. It is available in the United States and Canada. OCLC is pleased to partner with ImagineEasy Solutions to help promote library visibility to millions of students online. Find information on how to order EasyBib Library Edition at <http://www.oclc.org/en-US/easybib.html>.

## **Management Services and Systems**

### **OCLC, MatchWare Offer Citation Data in a Mind Mapping Software Tool**

OCLC is pleased to add MatchWare to its growing list of WorldCat.org traffic partners in Europe and around the world. MatchWare produces MindView, a mind-mapping tool tailored to suit the needs of students in an academic environment. MindView enhances an individual's ability to visually brainstorm, organize, and present ideas. Known for its award-winning Microsoft Office integration (*PC Magazine* Editor's Choice), this mind-mapping software lets users be more productive by turning ideas into action

faster than ever before. Now thanks to the integration of library holdings through the WorldCat Search API and Web services on the WorldShare Platform, MindView also connects users to their local libraries and provides citation information for library materials, based on WorldCat data. While initially developed for Fortune 500 companies, education, government, and business, MindView developers realized that university students with learning disabilities such as dyslexia were using it to generate written documents and presentations. As such, MindView software is currently used by more than 20,000 students at over 50 universities in the UK alone and by more than 15,000 students in Europe. MatchWare is a Danish software house founded in 1992, with offices in the United States, the United Kingdom, Germany, and France. MatchWare is privately held and financially backed by its executive team. A world leader in cutting edge mind-mapping and productivity software, MatchWare continues to release highly intuitive, visually pleasing software--packed full of powerful features to help users achieve professional results without the complexity of traditional software programs. MatchWare joins other WorldCat.org traffic partners to provide citations for their users that connect to libraries, including EasyBib, Mendelay. and Citavi. For additional information about OCLC partnership opportunities, visit the OCLC partner Web site at <http://www.oclc.org/en-US/partnerships.html>.

### **EZproxy 5.7 Now Available**

New features added to EZproxy 5.7 increase the system's flexibility for additional local control, including the following:

- A new config.txt option, MimeFilter has been added to allow EZproxy to determine which object types should support URL rewriting. This way, libraries can have finer-grained control over what content types (javascript, pdf, text, or HTML) are being rewritten, allowing greater flexibility in configuring access to e-content.
- In the admin server status screen, a checkbox for location has been added. If checked and geolocation is configured, the display includes relevant geolocation information for all session on the status screen. By including location, library staff can now see where their users are located when accessing e-content.
- When using LDAP authentication, expressions are now accepted for the BindUser and BindPassword directives. This change allows EZproxy administrators to use more complex expressions to derive bind usernames and bind passwords, enabling the use of LDAP without requiring a separate account for the EZproxy server.
- EZproxy now supports the range of cipher options using the SSLCipherSuite syntax and options supported in the Apache Web server, giving you more control over security settings with EZproxy. Use the configuration statement SSLCipherSuite to specify the cipher options, or note the previous cipher-related options can still be used.
- Many general bug fixes and additional security issues were also addressed in this release.

A hosted version of EZproxy is available. Libraries that subscribe to the hosted version are automatically and seamlessly upgraded with each new release of the service. They also enjoy 24 x 7 x 365 support for off-site authentication of electronic content with no servers or IT infrastructure required. We encourage you to upgrade to EZproxy 5.7 or move to the hosted version to stay current with the latest features. Please review the enhancements page and upgrade at your earliest convenience. For more details and a full list of changes see <http://www.oclc.org/support/services/ezproxy/documentation/changes.en.html>.

## **Resource Sharing and Delivery**

### **New Printing Options and More Available in WorldShare Interlibrary Loan**

OCLC will continue to add features to WorldShare Interlibrary Loan. These additions will expand the service to deliver functionality beyond that available in WorldCat Resource Sharing, including enhancements made in response to suggestions from WorldShare Interlibrary Loan users. New features now available in WorldShare Interlibrary Loan that are not available in WorldCat Resource Sharing are:

- 2-per-page bookstrap printing.
- 2-per-page request printing.
- Completion of recalled requests. Lets you remove recalled requests from your queue of active transactions.

“Reasons for No” have also been expanded:

- Two new reasons added to both WorldShare Interlibrary Loan and WorldCat Resource Sharing are: “Offsite” and “Too new to lend.”
- Reasons in WorldShare Interlibrary Loan now match those in WorldCat Resource Sharing.

The display of search results in order by number of holdings, also included in WorldCat Resource Sharing, is also now available in WorldShare Interlibrary Loan. Visit the list of future functionality(<http://www.oclc.org/en-US/worldshare-ill/features/future-functionality.html>) to see updates on plans for future enhancements to the new service.

## **WebJunction**

### **IMLS and Centers for Medicare and Medicaid Services to Partner with Libraries**

During the annual meeting of the American Library Association, The Institute of Museum and Library Services (IMLS), together with representatives from the Centers for Medicare & Medicaid Services (CMS), met with library representatives on Sunday, June 30, 2013, to hear more about what librarians can do to get ready to respond to patron requests for assistance in navigating new health insurance options in the Health Insurance Marketplace. The Marketplace website, [HealthCare.gov](http://HealthCare.gov), will be the primary tool for delivering information to Americans about their health coverage options. As prominent providers of Internet access and digital literacy training for people who lack Internet connections at home, libraries can anticipate intensified demand for computer services. IMLS and CMS will work cooperatively to make sure that libraries are aware of and able to connect patrons with information resources and community partners who are trained enrollment assistors. IMLS has also awarded \$286,104 to OCLC to support the effort through its flagship public library program [WebJunction.org](http://WebJunction.org). The goal is to assure that librarians have the information and connections with local experts needed to connect their patrons to information about the Health Insurance Marketplace when open enrollment begins October 1, 2013. OCLC will work closely with ZeroDivide, a social impact organization that helps underserved communities realize the transformative power of technology to improve health outcomes, to implement the program. Libraries have a long history of meeting public demand for consumer health



information. A recent IMLS study showed that an estimated 37 percent of library computer users (28 million people) use library computers and seek assistance from librarians for health and wellness issues, including learning about medical conditions, finding health care providers, and assessing health insurance options.

### **OCLC's WebJunction Marks 10 Years of Supporting and Serving Libraries**

The Bill & Melinda Gates Foundation and OCLC launched WebJunction in 2003 to amplify the value of libraries in the communities they serve. In May 2013, OCLC's WebJunction celebrated ten years as an online learning community for library staff. On 2003 May 12, a celebration at the U.S. Library of Congress marked the launch of WebJunction.org, a new online community dedicated to sharing the knowledge and resources necessary for libraries to successfully provide public access to information. Today, ten years later, WebJunction has grown and sustained a virtual gathering place where library staff build skills and find support in responding to the changing learning needs of the profession. More than 80,000 library workers from across the United States and beyond—including 8,740 new users in 2012—have used WebJunction's training content, live programs, articles, and stories to gain the knowledge, tools, and support that are needed to power vital libraries. Built with grant funding from the Bill & Melinda Gates Foundation, WebJunction has continually evolved its programs, content, and systems over the years to provide public libraries—especially small and rural libraries—with resources and skills to transform lives and strengthen communities. Among WebJunction's leading-edge programs:

- **Online learning.** WebJunction published Trends in E-Learning in 2006 and the Blended Learning Guide in 2007. WebJunction was a pioneer in using live online presentations to reach hundreds of librarians at a time, expanding to include multiday online conferences that are free and open to all. In 2009, WebJunction published the comprehensive Competencies Index for the Library Field, a compilation of the knowledge, skills, and attitudes that are necessary for various library staff roles.
- **Online training.** Since 2005, WebJunction has managed a number of national training programs that focus on critical issues in U.S. communities. In partnership with funders, such as the Institute of Museum and Library Services and the Bill & Melinda Gates Foundation, these programs have included: Training libraries on outreach to Spanish-language speakers; sustaining rural and small libraries; and supporting the needs of job seekers and the unemployed in the wake of the 2008 economic crisis. These three programs delivered training to 13,000 library staff across the nation. Current WebJunction programs are addressing how communities can support individuals who do not have access or skills to use computers or the Internet.
- **Online partnering.** In 2004, the WebJunction Partner Program was designed to allow state libraries to host localized training and resources on WebJunction.org. Initial partners included the state libraries of Colorado, Connecticut, Iowa, New Mexico, and Washington. Since then, 22 additional states have participated in the Partner Program. State libraries have been instrumental in their collaboration with WebJunction to deliver relevant and affordable continuing education to library staff in every role, from volunteer to director.

## **OCLC Research**

### ***First Steps for Managing Born-Digital Content Inspires SAA Jump In Initiative***

Building on the OCLC Research report, *You've Got to Walk Before You Can Run: First Steps for Managing Born-Digital Content Received on Physical Media*, the Jump In Initiative (<http://www2.archivists.org/groups/manuscript-repositories-section/jump-in-initiative>) is aimed to help archivists take some of those first steps this year. The steering committee of the Manuscript Repositories Section of the Society of American Archivists (SAA) developed the Jump In Initiative to encourage archivists and their institutions to "jump in" to managing born-digital content. Participants were asked to pledge to do so and to submit a short report about their experiences. By doing so, they were entered into a raffle to win tuition to a one-day SAA Digital Archives Specialist (DAS) course. Select participants will also discuss their experience at the Section's business meeting moderated by First Steps author Ricky Erway, which will take place at the SAA Annual Meeting in New Orleans in August 2013. An overview of the Jump In Initiative as well as the submitted reports are available on the SAA website. Published in August 2012, the *You've Got to Walk Before You Can Run: First Steps for Managing Born-Digital Content Received on Physical Media* report (<http://www.oclc.org/research/news/2012/08-23.html>), written by OCLC Research Senior Program Officer Ricky Erway, is the first in a series of short reports about managing born-digital materials. It intended for anyone who doesn't know where to begin in managing born-digital materials. It errs on the side of simplicity and describes what is truly necessary to start managing born-digital content on physical media. See the OCLC research website (<http://www.oclc.org/research/publications/library/2012/2012-06r.html>) for more information.

### ***Walk This Way Details Transferring Born-Digital Content from Readable Media***

Written by OCLC Research Diversity Fellow Julianna Barrera-Gomez and Senior Program Officer Ricky Erway, *Walk This Way: Detailed Steps for Transferring Born-Digital Content from Media You Can Read In-house* (<http://www.oclc.org/research/publications/library/2012/2012-06r.html#walkthisway>) presents the assembled wisdom of experienced practitioners to help those with less experience make appropriate choices in gaining control of born-digital content. It contains discrete steps with objectives, links to available tools and software, references and resources for further research, and paths to engagement with the digital archives community. This report is the third in a series of born-digital reports and is companion to the first report, *You've Got to Walk Before You Can Run: First Steps for Managing Born-Digital Content Received on Physical Media*. The First Steps report simplifies the processes of inventorying born-digital materials and copying them from old media to a form that can be managed into the future. *Walk This Way: Detailed Steps for Transferring Born-Digital Content from Media You Can Read In-house* provides more thorough guidance and tips on approaches, tools, and other resources. The second report in this series, *Swatting the Long Tail of Digital Media: A Call for Collaboration* (<http://www.oclc.org/research/publications/library/2012/2012-06r.html#longtail>), addresses transferring content from media that cannot be read in-house. For more information about the work related to these reports, see the Demystifying Born Digital activity page at <http://www.oclc.org/research/publications/library/2012/2012-06r.html>.

## OCLC Research Highlights in 2012 Activity Report

*OCLC Research: 2012 Activity Report*

(<http://www.oclc.org/research/publications/library/2013/2012activityreport-overview.html>) provides highlights of our work in 2012 and early 2013 organized into three areas:

- Shared community R&D.
- Advanced development and consultation within the OCLC enterprise.
- Member and Partner engagement.

It also provides an overview of the OCLC Research mission, a flavor of important themes in our work agenda, and examples of our outputs, including prototype systems or services, published reports, webinars, podcasts, videos, and meetings. The report presents a story of achievement and contribution and represents the significant value that OCLC Research provides to the OCLC enterprise, OCLC members, and the larger community.

### Find Books or Other Library Materials About Places with mapFAST Mobile

The new mapFAST Mobile (<http://experimental.worldcat.org/mapfast/mobile>) lets you search WorldCat.org from your smartphone or mobile browser for materials related to any location and find them in the nearest library. Available on the web and now as an Android app in the Google Play store (<https://play.google.com/store/apps/details?id=org.oclc.mapfast>), mapFAST is a Google Maps mashup that allows users to identify a point of interest and see surrounding locations or events using mapFAST's Google Maps display with nearby FAST geographic headings (including location-based events), then jump to [WorldCat.org](http://WorldCat.org), the world's largest library catalog, to find specific items and the nearest holding library. [WorldCat.org](http://WorldCat.org) provides a variety of "facets" allowing users to narrow a search by type of item, year of publication, language, and more. With mapFAST Mobile, smartphone and mobile browser users can do a search based on their current location, or an entered search. The user's location or search provides a center for the map, and nearby FAST subject headings are added as location pins. A "Search WorldCat" link then connects users to a list of records for materials about that location in [WorldCat.org](http://WorldCat.org).

### Tiers for Fears Offers Approach for Sharing Special Collections

*Tiers for Fears: Sensible, Streamlined Sharing of Special Collections*

(<http://www.oclc.org/research/publications/library/2013/2013-03r.html>), written by OCLC Research Program Officer Dennis Massie, presents strategies for providing efficient and affordable interlending of actual physical items from special collections for research purposes, as well as advice on determining if a loan is the most appropriate way to fulfill a particular request. A working group made up of resource sharing supervisors and special collections curators from OCLC Research Library Partnership institutions created a set of tools that will help institutions reconsider and streamline their processes for handling loan requests for special collections materials. Key findings from the report include:

- Lending physical items from special collections is now more common than not, at least within consortia.
- A sense of good will exists in the ILL community toward institutions that are willing lend special collections.
- Sometimes only the loan of physical items from special collections can satisfy a request.

- The rareness and condition of an item significantly impacts the lending decision.
- Risk is the most common reason for not sharing returnable special collections.
- The dominant factor in determining the level of lending effort and overhead is attitude toward risk.
- A tiered approach to streamlining workflows associated with lending special collections can be invoked based on the material, the request and the risk tolerance of curators and administrators.
- Trust must exist not only between borrowing and lending institutions but also between ILL and Special Collections.

Also included in the report are a model written sharing policy, a facilities "trust" checklist, and a flexible, tiered framework for getting to a sensible "yes" as often as possible.

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

The Directory can be found on the OLAC Website at:

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

If you have forgotten your Username or password please contact:

**Teresa Keenan**

[Teresa.keenan@umontana.edu](mailto:Teresa.keenan@umontana.edu)

OLAC Web Page & OLAC-L Administrator

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

Check out your information and send corrections to:

**Heather Pretty**

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