

# 2011

## OLAC NEWSLETTER



Photo taken by Rebecca Lubas

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## THE OLAC NEWSLETTER

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

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Material for publication in the OLAC Newsletter should be sent to the appropriate editor. Persons wishing to review books should contact Katie Eller, [katie.eller@gmail.com](mailto:katie.eller@gmail.com), indicating 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.

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**OUTREACH-ADVOCACY COORDINATOR**

Position currently vacant

## FROM THE PRESIDENT

**Amy Weiss**



In recent years, OLAC has seen declining membership. Some of the decline is easy to explain—we had many organizational members who quit their membership when they found that they could access the Newsletter online for free. Other reasons are less obvious. Are our members retiring, and if so, are they being replaced with other people who consider themselves media catalogers? Recent job ads for what used to be cataloging stress “metadata” and “digital initiatives,” but one wonders, how many of these people are cataloging more traditional media on the side. Perhaps our name is a problem. Audiovisual is an old-fashioned word at this point, and while our conferences increasingly focus on electronic resources our potential members may not connect with the audiovisual terminology. As for online, where else would cataloging take place?

In recent Board meetings we have discussed how OLAC is now a name rather than an acronym, sort of like OCLC, which also no longer stands for anything (no jokes please). But by any name, we are still an organization with much to contribute, both to the professional development of our members and to the cataloging world at large. If you are reading this and you are a member, I hope you’ll help promote the organization to the librarians you work with. If you’re not, I assure you that OLAC is worth your support. Someday, some way, you’ll find yourself cataloging something that isn’t quite one thing but isn’t quite another, and when you find yourself there, OLAC is where you can turn for help.

## FROM THE EDITOR

Kate Leigh



The past few months have been an eventful time for catalogers, including the *Report and Recommendations of the U.S. RDA Test Coordinating Committee* on the implementation of RDA and the Library of Congress announcing plans for moving away from MARC. Fortunately, OLAC was well-represented at the 2011 ALA Annual Conference in New Orleans, and several of our members and liaisons have reports on the above issues and more. To find out what was discussed at the OLAC meetings, see Marcia Barrett's comprehensive minutes (beginning on page 8). Additionally, we have liaison reports from Cate Gerhart, Kelley McGrath, and Mary Huismann (p. 23). Thank you to Marcia, the liaisons, and other members, who keep OLAC informed with the changes that are happening now and the changes that are to come.

There are two reviews in this issue. The first is of *Broken Pieces: a Library Life, 1941-1978* by Michael Gorman (p. 41-42). It is a memoir of Gorman's early life, from his childhood in England to the beginnings of his library career in the United States. The second book is *Practical Strategies for Cataloging Departments* edited by Rebecca Lubas (p. 43-44). *Strategies* discusses multiple issues that affect cataloging departments, including, training, evolving standards, and collaboration.

Congratulations to the 2011 Nancy B. Olson Award recipient: Greta de Groat of Stanford University Libraries. To find out more about Greta's contributions to the audiovisual community and OLAC, please see the News and Announcements section (p. 38).

Have a wonderful fall season!

**TREASURER'S REPORT**

**4th Quarter FY10**

**April 1 - June 30, 2011**

**Nathan Putnam**



	4th Quarter	FY-to-Date
<b>Opening Balance</b>	\$11,503.74	\$
<b>Income</b>		
Memberships	\$1,119.00	\$ 5,422.00
Membership Refunds	\$ -	(60.00)
Other Inc.	<u>\$.29</u>	<u>\$ 691.06</u>
Total	\$1,119.29	\$ 6,053.06
<b>Expenses</b>		
ALA	\$60.00	\$ 60.00
Awards	\$ -	\$ 5,210.22
Bank Charge	\$ 35.00	\$ 83.00
Board Dinner	\$ -	\$ 406.30
Conference	\$ -	\$ 7,300.00
Misc. (including ALA)	\$ 72.00	\$ 533.99
Newsletter Production	\$ -	\$ 400.00
PayPal Fee	\$ 29.07	\$ 117.02
Postage	\$ -	\$ 8.82
Stipend	\$ 300.00	\$ 2,400.00
Website Administration	<u>\$ -</u>	<u>\$ 380.00</u>
Total Expenses	<u>\$ 496.07</u>	<u>\$ 16,899.35</u>
<b>Closing Balance</b>		\$ 12,126.96
Personal Membership	280	
Institutional Membership	<u>19</u>	As of July 25, 2011
<b>Total</b>	299	

## CONFERENCE CORNER

Rebecca Lubas



OLAC 2012 planning is underway! The keynote speakers for “Post-Modern Cataloging: It’s all AV Now!” will be Eric Childress of OCLC and Lynne Howarth of the University of Toronto.

Please watch the OLAC 2012 website, <http://olac2012.weebly.com/>, for further speaker announcements and for opinion polls on program and activity development!



Photos taken by Rebecca Lubas





## ALA MIDWINTER MINUTES JANUARY 2011

**Marcia Barrett**



### **OLAC Executive Board Meeting Minutes**

May 26, 2011, 3:00 p.m.

Conference Call Hosted by OCLC

The meeting was called to order at 3:00 p.m. by President Sevim McCutcheon. Board members present were: Marcia Barrett, Debbie Benrubi, Bobby Bothmann, Robert Freeborn, Kate Leigh, Rebecca Lubas, Sevim McCutcheon, Nathan Putnam, Amy K. Weiss, and Jay Weitz.

#### **1. Welcome and Introductions**

Sevim welcomed everyone to the meeting.

#### **2. Announcements**

There were no announcements.

#### **3. Amend and Adopt the Agenda**

Discussion of the 2010 Conference was moved to the beginning of the agenda which was otherwise adopted as written.

### **New Business**

#### **4. 2012 OLAC Conference Report (Rebecca Lubas)**

Bobby is on the arrangements committee. The committee has had some conference calls already. The Hyatt Albuquerque appears the newest of the hotels under consideration and is in the best location. The committee is trying to get a website launched before ALA Annual in order to have information to convey at the OLAC Membership meeting.

The committee has discussed possible keynote speakers and is waiting to hear from their first choice for a keynote speaker. They've also lined up four workshops: Paige Andrew – map preconference, Jay Weitz – video and sound recordings, local people - metadata, Bonnie Parks – e-serials in context of choosing good vendor records. Debbie suggested the topics MarcEdit and form/genre from the OLAC survey that identified training needs. She will send the full survey results to Rebecca. The committee is still working on a closing speaker and conference theme.

Rebecca forwarded an email from Debbie Benrubi to Rachel at U&M regarding sponsorships. The NMCAL (New Mexico Consortium of Academic Libraries) is a potential sponsor for scholarships for librarians from New Mexico. She has talked with Nathan about the bank account, selected a conference treasurer (Elizabeth Miller), and plans to find a bank soon. There seem to be enough people to help out with the website, fundraising, and other tasks.

Debbie suggested that at some point, we all ask for sponsorship from our own institutions. Rebecca will try within New Mexico, but isn't optimistic because of the economy. She welcomes the idea of Board members asking their institutions to sponsor the conference.

## **Officer Reports:**

### **5. Outreach/Advocacy Report (Debbie Benrubi)**

Only Robert has volunteered for a time at the affiliates booth at ALA Annual; perhaps it's too early for people to know their schedules. Debbie encouraged everyone to sign up for a slot (available Saturday, Sunday, and Monday).

Debbie has identified and had discussions with a graphic designer to work on the OLAC brochure revision. The designer will have some drafts to show Debbie by June 13. Debbie is interested in revisiting OLAC's name, logo, and tagline. She suggests keeping the name "OLAC" but changing the words each letter stand for since "audiovisual is so last century." Changing the name legally might be difficult, but doing so unofficially would be possible, as long as the treasurer knew and the handbook recorded the official, legal name. The proposal is to drop "Online Audiovisual Catalogers" and change the tagline "The Internet and AV Media Catalogers Network" to something like "the media catalogers network."

OLAC is sponsoring the RDA Preconference. Debbie will bring OLAC literature to the preconference.

This is the end of Debbie's second term, and it is time for her to be replaced according to the *OLAC Handbook*. She is willing to complete revision of the brochure, even if her term ends.

### **6. Secretary's Report (Marcia Barrett)**

Minutes of the December 2010 Executive Board Conference Call and minutes of the 2011 Midwinter CAPC and Membership meetings were published in the March 2011 issue of the *OLAC Newsletter* (vol. 31, no. 1). Officer information has been updated on the website, but she has not yet followed up with proposed changes to the calendar. Marcia questioned whether we have enough members on CAPC. Robert indicated that there are.

**7. Treasurer's Report (Nathan Putnam)**

OLAC has around \$12,000 in the checking account. We have 277 individual memberships, a decrease of about 75 from last year. Institutional memberships have dropped to 19.

**8. CAPC Report (Robert Freeborn)**

Some agenda items at the Annual meeting are reports from the BIBCO Standard Records Task Force, Genre/Form Task Force, and LC representative. If the National Libraries decide to implement RDA, Robert plans to have CAPC go through the current documentation and update the guides. He will not be able to attend the membership meeting on Sunday but will send a CAPC report to Kate.

**9. Newsletter Editor's Report (Kate Leigh)**

Kate is working on the June newsletter. Deadline for submissions is Tuesday, May 31. She has talked with Rebecca, and they plan to have a section in the newsletter on the 2012 Conference in the next few issues. She is working on the ALA Meetings of Interest to OLAC members and asked, in the past few lists, if there were any that should not have been on the list or any that should be added. There were no suggested changes.

**Old Business**

**10. Online / Regional Training Task Force (Bobby Bothmann)**

The Task Force did not report progress but expects to soon. They do have a list of willing potential trainers, with their areas of expertise. Debbie is hopeful that the list can be used for organizing training in southern California. Recently, the California Library Association and OLAC co-sponsored a full-day workshop in San Jose on cataloging digital media.

**11. Website Rewrite Task Force (Pat Loghry)**

Not present (no report)

**12. Nancy B. Olson Award (Sevim McCutcheon)**

Greta de Groat was selected for the award and will be presented a plaque at the membership meeting. She is not able to attend the meeting but is hoping to send a colleague in her place.

### **13. OLAC Conference Manual Revision (Sevim McCutcheon)**

Debbie and Sevim worked on the unofficial manual with the plan of making it an official OLAC Conference Manual. Board members received a copy several weeks ago via email. Sevim asked if there were any comments before calling for Board approval and publication on the web.

Suggested changes: include more recent examples (examples from various years are helpful), fundraising, and evaluation forms. The manual states that we don't accept credit cards. We can accept PayPal, depending on the treasurer (it has to be set up for each treasurer).

### **14. OLAC Election Results (Bobby Bothmann)**

OLAC had a really good election with two candidates for vice president/president-elect and three candidates for secretary. The biographical information for candidates was readily available, and 70% of voters read the ballots before voting. This was our best election in terms of number of candidates and voter participation. We should keep in mind the candidates' interest in participating in OLAC and getting the perspective of librarians outside academia. Heidi Frank was elected vice president/president-elect, and Bruce Evans was elected treasurer.

### **15. Newsletter Editor Search (Marcia Barrett)**

Kate will step down as OLAC Newsletter Editor at the end of her term, December 2011, and Marcia volunteered to seek a replacement. It will be good to have the new editor working with Kate ahead of time, to overlap before the March 2012 issue. Marcia asked Kate for feedback on the position description as written in the Handbook. Kate suggested reconsidering the requirement that the editor attend ALA meetings and OLAC Conferences.

### **16. Webmaster Backup (Kate Leigh)**

OLAC needs to have a back-up webmaster in case Teresa is ever unavailable; otherwise, there is no way of publishing the newsletter or making updates to the website. Sevim will contact Teresa to let her know we've discussed this and ask for suggestions on possible candidates.

The webmaster receives a stipend of \$50 for each quarterly newsletter, plus \$50 each quarter as webmaster. The Board decided that \$50/quarter would be appropriate for the position of webmaster assistant.

### **17. ALA Annual, June 2010 (Sevim McCutcheon)**

CAPC meets Friday, June 24 from 7:00 to 9:00 in the Loews Hotel (LaFourche room). OLAC Membership meets Sunday, June 26 from 4:00 to 5:30 at the Embassy Suites (Jean Lafitte 1). Marcia will not be able to attend the Saturday Executive Board dinner due to a conflict.

## OLAC Cataloging Policy Committee (CAPC) Meeting Minutes

June 24, 2011, 7:00 p.m.

Loews Hotel, Lafourche Room

### Present

Members present:

Robert Freeborn (chair), Pennsylvania State University; Anchalee (Joy) Panigabutra-Roberts, University of Nebraska-Lincoln; Heidi Frank, New York University; Susan Wynne, University of Wyoming; Walter Walker, Loyola Marymount University

Liaisons:

Janis Young, Library of Congress Policy and Standards Division; Kelley McGrath, University of Oregon (CC:DA); Jay Weitz, OCLC; Cate Gerhart, University of Washington (MARBI)

Visitors:

Donna Viscuglia, Harvard; Damian Iseminger, New England Conservatory; Katia Strieck, University of Pennsylvania; Nancy Lorimer, Stanford University; Christina Hennessey, Loyola Marymount University; Kathy Glennan, University of Maryland; Sandy Roe, Illinois State University; Carolyn Walden, University of Alabama at Birmingham; Silvia Mariscal, University of California, Los Angeles; Felicity Dykas, University of Missouri; Bryan Baldus, Quality Books, Inc.; Helen Gbala, College of DuPage; Becky Culbertson, California Digital Library; Dawn Loomis, Valencia College

### 1. Approval of Minutes from 2011 Midwinter

The minutes of the 2011 midwinter meeting were approved as written.

### 2. Announcements

Robert Freeborn thanked outgoing CAPC members Heidi Frank and Susan Wynne for their service and introduced incoming committee members Anchalee (Joy) Panigabutra-Roberts, Diane Robson, and Stacie Traill as well as interns Dawn Loomis and Katia Strieck.

### 3. Reports

#### a. MARBI Report (Cate Gerhart)

See the MARBI Report elsewhere in this newsletter.

#### b. CC:DA Report (Kelley McGrath)

See the CC:DA Report elsewhere in this newsletter.

#### c. Video Language Coding Best Practices Task Force (Kelley McGrath)

The optional use of 041 \$h to represent the original language of a work regardless of whether or not a translation is involved was approved by MARBI at Midwinter. At this point, all of the task force's recommendations have been approved, but several have not yet been incorporated into the MARC documentation. The LC Network Development and MARC Standards Office has promised to incorporate these into their next update after Annual. After this is done, the task force will revise the recommendation and submit a new draft for approval.

**d. LC Genre/Form Headings for Moving Images Best Practices Task Force (Susan Wynne for Scott Dutkiewicz)**

LC has re-issued genre/form authority records with the new coding, and the task force has updated examples to reflect that coding. The document has already had a public review, and there was agreement that there was no need for another review. It will go to CAPC for email review and approval unless CAPC determines otherwise after seeing the final draft.

**e. AV Materials Glossary Update Task Force (Heidi Frank)**

A web interface has been developed and transferred to the OLAC website. It is publicly accessible at:

<http://www.olacinc.org/AV-Glossary/>

This public interface is still in development, with a number of features to be added and tested, such as the ability to view the bibliography of sources, incorporating RDA aspects, testing browser compatibility, finessing the search capabilities, among other things.

The majority of terms from the original 1988 print AV Glossary publication by Nancy Olson have been entered in the database, which currently comprises 747 entries.

The Task Force welcomes any comments and feedback regarding the Glossary interface – please forward them to Heidi Frank ([hf36@nyu.edu](mailto:hf36@nyu.edu)).

Katia Strieck has led Task Force members in compiling a list of new terms to add to the glossary, with more than 30 thus far. We have been attempting to compile this list using an Excel spreadsheet via Google Docs. Once the list seems somewhat complete, an overall view of the list will then be evaluated to assure consistency and to avoid duplication, overlap, or synonymous terms.

A new Introduction has been drafted by Carolyn Walden. This text along with the definitive scope of the Glossary is being reviewed and defined. We feel this online version of the Glossary, while being prompted by the original print publication, is becoming its own entity that will be continually updated and revised over time.

The goal for the current Task Force members is to complete the following tasks by ALA Midwinter 2012:

- assure that all terms from the original print publication have been fully entered in the database
- re-program the administrative interface and document the procedures for adding and editing terms
- finish programming the key features and interactivity of the public interface
- provide a clear and precise statement regarding the scope and purpose of the Glossary
- significantly contribute to the development of new terms, especially in the area of electronic resources

Again, please feel free to contact one of the Task Force members if you have any questions or comments regarding the Glossary, especially the public web interface, and also if you have any insight into the process of developing the Glossary terms.

Current Task Force members:

Heidi Frank, chair  
 Carolyn Walden  
 Katia Strieck  
 Karen Sigler  
 Amy Pennington  
 Andrea Reed

**f. RDA Testing (Kelley McGrath)**

See the report on RDA Testing elsewhere in this newsletter.

**g. LC Report (Janis Young)**

Paul Weiss, cataloging subject specialist who handled subject headings and classification in the social sciences, law, and philosophy at the Library of Congress retired in February, leaving three subject specialists in PSD.

The frequency of the tentative subject heading and classification lists has changed, effective June 20, from weekly to monthly. This is an experimental change and may be revised as circumstance dictate. Also, PSD is implementing a new process for the genre/form proposal system. The review process for proposals has not changed and proposals will get the same attention as they always have, but throughput times for proposals may be longer.

On May 24, more than 700 existing genre/form authority records were cancelled and reissued with new MARC coding. LCGFT authority records now have a 008/11 value of "z" (other) and a 040 \$f value of "lcgft." The LCCN prefix has been changed to "gf" to highlight the fact that these terms are from a new thesaurus. The revised MARC coding will enable automatic validation of LCGFT terms applied in bibliographic records. With this revision to the MARC coding, correct coding of LCGFT terms in bibliographic records is 655 #7 \$a [term] \$2 lcgft. Updated records

have started to appear in OCLC. It is anticipated that bibliographic file maintenance will be complete by the end of the year.

The Music Library Association has partnered with PSD to develop genre/form terms in the area of music. They have agreed to a list of 800-1000 terms, and the MLA Subcommittee is now working on syndetic structure among the terms. LC's genre/form project for religion is ongoing, and terms for law materials were implemented in June. The literature project will begin in 2011. More information about LC's genre/form projects is available at <http://www.loc.gov/catdir/cpsd/genreformgeneral.html>

Janis gave a second report on behalf of Andrea Leigh, Head of Moving Image Process at the Packard Campus for Audio Visual Conservation. MBRS (Moving Image Broadcasting & Recorded Sound) staff are doing more copy cataloging for copyright deposit for DVDs and Blu-ray. They have used *Archival Moving Image Materials* 2<sup>nd</sup> edition to describe these formats, but in September 2010 began a pilot project to download OCLC member copy to determine if copy cataloging would be feasible as part of the regular workflow, given that MBRS will continue to use AMIM2 to describe the original release prints of motion pictures and broadcast manifestations of programs regularly received through copyright deposit.

A review of AACR2r Chapter 7, the Library of Congress *Descriptive Cataloging Manual*, and OLAC's *Guide to Cataloging DVD and Blu-ray Discs Using AACR2 and MARC21* led MBRS staff to conclude that these content standards and guidelines are compatible with AMIM2 rules with a few key exceptions. Changes made to records:

- 008/15-17 – re-coded for country of production, rather than country of distribution or release
- 008/byte 33 – re-coded for motion picture, rather than videorecording
- GMD – deletion of the GMD for videorecording, since Moving Image Section practice is to describe more than one physical format on a single record representing the same work
- 257 – addition of 257 field for country of production
- 6xx – corrections (invalid subject headings, subject headings subdivided geographically that are not authorized for geographic subdivision, erroneous use of free-floating subdivisions)
- 7xx – creation of name authorities, when applicable

Concerns were raised about changes being made to the master record because no one wants to re-edit records. Janis encouraged everyone to raise questions with Andrea who will be at the OLAC membership meeting on Sunday. [Update: LC will not be uploading edited records back to OCLC].

#### **4. Old Business**

##### **a. BSR for Moving Image Materials, Graphic Materials and ER (Walt Walker)**



After completing the BIBCO Standard Record for Moving Image Materials, Graphic Materials and Electronic Resources and a supplement for electronic resource aspects, all of which are available on the [BIBCO](#) website, the task force was asked to create an example for provider-neutral guidelines applied to a moving image format title and an example of the provider-neutral guidelines applied to graphic material by Rebecca Culbertson and the PCC Standards Committee. They created those examples in OCLC in April. Those examples are being moved to Appendix C in the Provider Neutral Guidelines. Rebecca Culbertson is writing a MARBI discussion paper about adding 007 subfields to better accommodate online videos which the task force can review and comment on, and they expect to do that this summer. Also, they anticipate that PCC will eventually ask the task force to revise the BSRs for RDA.

**b. Moving Image Work Grant (Kelley)**

See the Moving Image Work Grant report elsewhere in this newsletter.

**5. New Business**

**a. 046 \$k Best Practices Task Force (Rob Freeborn)**

This topic was tabled for later discussion

**b. Plans for RDA (Rob Freeborn)**

Now that the RDA test is complete, CAPC should consider revising OLAC documentation. Rob distributed a list of current OLAC documentation/guidelines for consideration. The following were determined to be the most important to revise:

- DVD and Blu-ray Discs
- Playaway Devices (people want more help with this format)
- Streaming Audio and Video
- Creation of a general document to address things like iPads, Kindles, flash memory devices (things libraries are circulating)

CAPC will need additional help because this represents a significant workload, but CAPC members will take the lead in revising the documentation. Rob plans to discuss with CAPC members to gauge interest and make assignments, then will put out a call to OLAC-L for volunteers.

John Attig has said that JSC wants more examples for RDA. Updating OLAC guidelines and documentation will make it easier to provide examples. The RDA Examples Task Force has been dissolved now that CAPC is taking on the bigger task of revising the cataloging documentation.

**6. Adjournment**

The meeting was adjourned at 8:56.

## **OLAC Membership Meeting Minutes**

June 26, 2011, 4:00 p.m.

Embassy Suites, Jean Lafitte 1

### **Present**

Mary Konkel (College of DuPage), Abby Scheel (Florida State University), Annie Glerum (Florida State University), Hong Li (Backstage Library Works), Yoko Kudo (University of California, Riverside), Rebecca Lubas (University of New Mexico), Richard Pugh (Library of Congress), Nathan Putnam (George Mason University), Andrea Leigh (Library of Congress), Richard N. Leigh (Ball State University), Kate Leigh (Ball State University), Jay Weitz (OCLC), Katia Strieck (University of Pennsylvania), Debbie Benrubi (University of San Francisco), Heidi Frank (New York University), Pat Loghry (Notre Dame University), Helen Gbalah (College of DuPage), Kevin Furniss (Tulane University), Christina Hennessey (Loyola Marymount University)

### **Agenda**

#### **1. Welcome & Introductions (Sevim McCutcheon)**

Sevim McCutcheon called the meeting to order and introduced herself as OLAC president for the “next hour and a half.” She welcomed attendees and asked everyone to introduce themselves.

#### **2. Announcements (Sevim McCutcheon)**

Available handouts include Copy cataloging DVDs and Blu-Ray Discs at the Library of Congress, MOUG/OLAC Liaison Report, and Call for OLAC Newsletter Editor.

#### **3. Amend and Adopt the Agenda (Sevim McCutcheon)**

News from OCLC (Jay Weitz) was added to the agenda.

### **Officers' Reports**

#### **1. Outreach/Advocacy Report (Debbie Benrubi)**

OLAC co-sponsored a workshop, Cataloging Digital Media Using Current and Emerging Standards, with the California Library Association this spring featuring OLAC members Jay Weitz and Julie Moore.

Debbie thanked the many OLAC members who have promoted OLAC and gave a few examples of how people have supported the organization:

- Ruth Horie, University of Hawaii, set up templates for cataloging oral histories when she trained staff at a museum library. She also distributed brochures for OLAC.
- Paige Andrew, maps cataloging librarian at PSU, promoted OLAC at several workshops he conducted at the North American Cartographic Society Conference Annual Conference.

- Deborah Ryszka, University of Delaware, promotes OLAC when she trains copy catalogers.
- Dana Tonkonow, Central Connecticut University, promotes OLAC at regional organization meetings.
- Christina Hennessey, Kate Leigh, Rob Freeborn, and Iris Liu worked at the OLAC Affiliates Booth this weekend

Debbie has located a graphic designer to update the OLAC brochure.

The outreach/advocacy coordinator is appointed in odd-numbered years, so OLAC is seeking a new person for the position. Debbie reviewed the responsibilities as outlined in the OLAC Handbook.

## **2. Secretary's Report (Marcia Barrett)**

Minutes of the CAPC and Membership Midwinter meetings were published in the March *OLAC Newsletter*, as were minutes of the Executive Board meeting which was held via conference call in December before ALA Midwinter.

The Executive Board met via conference call again several weeks ago, and those minutes will be published in the September issue of the OLAC newsletter, as will the minutes of this conference for the CAPC and membership meetings.

## **3. Treasurer's Report (Nathan Putnam)**

OLAC has 181 personal members and approximately \$12,000 in the checking account. Nathan met with Bruce Evans, incoming treasurer, to start the process of transferring OLAC finances over to him.

## **4. CAPC's Report (Kate Leigh for Robert Freeborn)**

There were about 25 people in attendance at the CAPC meeting. Susan Wynne and Heidi Frank are rotating off the committee. Joy Panigabutra-Roberts, Stacie Trail, and Diane Robson are joining the committee. CAPC also has two new interns, Dawn Loomis and Katia Strieck. CAPC received reports from all groups listed in the agenda, most extensively from MARBI and CC:DA. The LC Genre/Form Headings for Moving Images Best Practices Task Force will be submitting a report via email to CAPC for discussion and vote. Work is ongoing with the AV Materials Glossary Task Force, the BIBCO Standard Record for Moving Image Materials, Graphic Materials, and Electronic Resources, and the Moving Image Work Grant. Work on the 046 subfield k Best Practices Task Force was tabled.

Initial discussion occurred about updating OLAC documentation in preparation for RDA. Of the current documents, it was decided that CAPC will concentrate on revising the documents for Playaways, DVDs and Streaming Audio and Video. The documents will be divided among

committee members and additional assistance will be sought from OLAC membership. If you're interested in working on one of the documents, contact the CAPC chair. After these documents are revised, CAPC will investigate creating a general guide for flash media devices.

#### **5. Newsletter Editor's Report (Kate Leigh)**

The June newsletter went out about 14 days ago and is available as both PDF and HTML formats on the OLAC website. Please let Kate know if there are things to include in the September issue, especially photographs from this conference. The newsletter editor position will be available beginning January 2011. If anyone has questions about the position, feel free to email Kate.

### **Old Business**

#### **1. Online/Regional Training Task Force (Debbie Benrubi)**

The Online Regional Training Task Force surveyed OLAC members, soliciting training needs as well as names of people who could be trainers. The task force has generated a list of potential trainers and sent that to people in various regional groups who want to sponsor training which OLAC could co-sponsor. Christina Hennessey has been in correspondence with the task force about a workshop the Southern California Technical Processors Group is planning in the fall, and OLAC will be asked to co-sponsor.

If you are involved in any regional planning, please contact a member of the task force. Task force members are Debbie Benrubi, Bobby Bothmann, and Marcia Barrett. The task force is going to be developing more ideas for regional and online training.

If you want to see results of the survey or would like to be involved in regional planning, contact Debbie.

#### **2. Website Rewrite Task Force (Pat Loghry)**

The task force has not worked on rewriting the website but has broken out into groups. Each person has made some updates. They considered doing a survey of the membership to determine what people would like the website to look like. They are trying to make sure that everyone who is an incoming officer has all of the facts, contact information, and responsibilities of what they have to do. Sevim will be taking over the task force after this conference, so if anyone has suggestions, please let her know.

### **New Business**

#### **1. News from OCLC (Jay Weitz)**

Connexion Client version 2.30 was released in April. It includes many enhancements to existing functionality - links to RDA Toolkit if you are a subscriber, the 029 fields have been moved to the

bottom of the record, the export of workforms is allowed, and there is a new search box limit by language of cataloging. The limit is retained until it is changed. The Connexion Browser was upgraded on May 15, 2011, and some enhancements include the language of cataloging limiter in the search box and links to RDA Toolkit if you're a subscriber. Both the Client and Browser have been enhanced with authority control capabilities, especially regarding music uniform titles. More information is available in Technical Bulletin 259, and there's a free webinar on the OCLC website that was presented in April.

OCLC-MARC Bibliographic, Authority and Holdings update 2011 will be installed in late August. It will include all of MARC Update No. 12 and all code list changes announced by LC since May 2010, as well as various suggestions from users and OCLC staff. Of interest to OLAC members is the computer files format – direct ER and tangible ER (008/23). Now, we're able to distinguish between direct access and tangible electronic resources.

Most likely coming in August (or later in 2011), regular enhance institutions that also have NACO authorizations that are not BIBCO participants will be able to edit and replace PCC records in the bibliographic format they're authorized for. This is a significant expansion of the enhance capability! OCLC will announce this before it happens.

National libraries have announced that they will implement RDA no earlier than January 2013. In that context, OCLC has revised its current policies for records in WorldCat that are either AACR2 or RDA. Later this year, OCLC will issue a discussion paper (it will be widely issued) to seek opinions about how to handle records of "mixed heritage" in WorldCat.

## **2. Nancy B. Olson Award (Sevim McCutcheon for Pat Loghry)**

The winner is Greta de Groat. Since she was unable to attend the conference, there wasn't a plaque presentation. Her accomplishments are lengthy and noteworthy and will be published in the September newsletter.

## **3. 2012 OLAC Conference Report (Rebecca Lubas)**

The 2012 Conference will be in Albuquerque, New Mexico October 18-20, with a preconference on the 17th. The conference website is ready and will be linked to the OLAC website very soon. Keynote speakers have been arranged. They are planning an exciting mix of speakers. Jay Weitz has agreed to do a workshop, and Paige Andrew will do a preconference on maps. RDA will be among the topics, of course.

The hotel will not open registration until 13 months in advance, so at that point, the registration link will go live. The hotel, Hyatt Albuquerque, is in downtown Albuquerque. The reception will be in the hotel, so that money can go toward food rather than transportation to another location. Conference organizers will make clear what meals are provided so attendees will know how to budget.

The committee is working to promote the conference in the region. New Mexico has a lot of rural libraries that do not have funding to send people, and there are people who will not be able to attend except during the weekend. They are hoping to offer scholarships with funding from external sources.

The committee is going to provide links to things to do in Albuquerque and the surrounding area. Rebecca encouraged everyone to watch for when registration opens up because she has talked to the conference hotel about giving price break to early registrants. Rebecca highly recommends going to the balloon festival. It is scheduled for weekend before the OLAC Conference, and it is one of the top 100 events in the United States. Bobby Bothmann and Sylvia Hall-Ellis are helping Rebecca and local members of the committee. Rebecca encouraged everyone to visit the website and to share it: [www.OLAC2012.weebly.com](http://www.OLAC2012.weebly.com)

### **3. OLAC Conference Manual Revision (Sevim McCutcheon)**

Debbie and Sevim worked on the unofficial conference manual, which Mark Richard started in 2004. The 2004 conference was international so some of the content was not applicable. Debbie and Sevim have updated the manual, and it is now available on the OLAC website. Sevim encouraged conference chairs to add to it.

### **4. OLAC Election Results (Sevim McCutcheon for Bobby Bothmann)**

Bruce Evans is the new treasurer, and Heidi Frank is the new vice president/president.

### **5. Call for Newsletter Editor (Marcia Barrett)**

OLAC is seeking a Newsletter Editor for a two-year term beginning 2012. The successful candidate will have the opportunity to work with the current editor on several issues before assuming responsibility for publication of the March 2012 newsletter. Editorial experience is preferred but not required.

Interested candidates should send a CV, letter of application and a writing sample to Marcia Barrett ([mbarrett@ua.edu](mailto:mbarrett@ua.edu)) before July 30. The position description with a complete list of responsibilities is available on the OLAC website under the OLAC Manual and those responsibilities are also listed on the handout, "Call for OLAC Newsletter Editor."

### **6. LC's DVD and Blu Ray Copy Cataloging Guidelines (Andrea Leigh, Moving Image Section at LC's Packard Campus for AV Conservation)**

LC uses *Archival Moving Image Materials*, 2<sup>nd</sup> edition (AMIM2) to describe its archival resources; however, they have been increasingly receiving commercially available DVDs. A lot of producers copyright their DVDs. LC looked at OLAC's *Guide to Cataloging DVD and Blu-ray Discs Using AACR2 and MARC21* to see how those guidelines would interact with AMIM2. LC still needs to use AMIM2 for their theatrical releases, broadcast manifestations, etc. because there is a lot of

complexity involved with cataloging them. With AMIM2 rules, it is the equivalent of creating a work record. They are still operating largely in an archival environment, and there are key differences between AMIM2 and AACR. LC's procedures are intended to be used in conjunction with AMIM (which differ from AACR2).

Andrea reviewed some of the key points of LC's copy cataloging guidelines. Field 257, country of production is now allowed for non-archival resources, and that is important information for LC's community of users. They code the 008 to match. Their users are more interested in country of production than distributor information. They use a system that does not allow for publication information. From LC's point of view, DVDs are distributed, not published. They have never used GMDs and delete this information from records. They found many inconsistencies in subject and genre/form application. LC has internal guidelines and are working on getting them publicized. They have not been using the heading "Videorecordings for the hearing impaired" but will start using this heading. A member mentioned that it would be very helpful if they published their use of genres. Andrea said she is happy to do this as soon as she can get to it. She will work with Janis to go through the LC Policy Office.

The grey area is uniform titles and how to use them. They have been using the 130 field for the work. The DVD is a different expression of a work from the original theatrical release, and they had issues with trying to connect all of that together, what with content changes. The cleanest solution was to trace the original in a 730 field.

This is the first forum in which they have announced they are doing some copy cataloging. It is a small percentage of what they do – about 10%; however, Andrea sees it as an important service to the community they serve. They will not be uploading edited copy back up to OCLC. Their records are in the LC Catalog but are not distributed. Andrea offered to provide links so that OLAC members can look at some examples. A member suggested that this would be a great poster session topic at the 2012 OLAC Conference.



**Machine-Readable Bibliographic Information Committee (MARBI)  
Liaison Report**

Submitted by Cathy Gerhart  
University of Washington Libraries

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

**Proposal No. 2011-02: RDA production, publication, distribution and manufacture statements in MARC 21 Bibliographic Format**

This proposal put forth 2 options for indicating the additional bodies responsible for parts of the publication process. Option 1 will be adopted leaving the 260 field as it is. A new field 264 will be defined for documenting the production, publication, distribution and manufacture statements as described in RDA. The 264 field will use indicators to define what kind of body is in that field. An additional indicator will be added for "Copyright" so that you can document the copyright date separately if desired.

**Proposal No. 2011-03: Encoding date of copyright notice in the MARC 21 Bibliographic Format**

Option 3 was chosen for this proposal, using Field 264 as indicated in Proposal No. 2011-02 above with an indicator value for copyright date.

**Proposal No. 2011-04: Adapting Field 377 (Associated language) for language of expression in the MARC 21 Authority and Bibliographic Formats.**

This proposal revises the definition of the 377 field so that it can code for language of expression as well as language of the person in an authority record. Option 2 was adopted using \$l (instead of \$b) to indicate the language of the expression. Also, there will be additional examples added to clarify usage.

**Proposal No. 2011-08: Treatment of controlled list of terms for carrier characteristics in RDA in the MARC 21 Bibliographic Format.**

This proposal considers the question of how to deal with the lists of terms for carrier characteristics in RDA. It was fairly unanimous that the 300 field as it currently is should be left alone, so the new subfields will be added to 340 and new field 344, 345, 346 and 247 will be added to the formats. It is hoped that with carrier information in separate field it will made access to it more easily actionably by a computer. The terms in these fields are from lists for carrier characteristics in RDA.



**Proposal No. 2011-09: Identifying the source of thematic index numbers in field 383 in the MARC 21 Authority and Bibliographic formats.**

This proposal passed adding a new subfield for a more explicit indication of the thematic index being used in the 383. This new \$d will be called "Thematic index code". A new \$e will also be added to indicate the publisher of the thematic catalog.

**Discussion Paper No. 2011-DP-05: Additional means of identifying medium of performance**

The only discussion paper on the agenda looked at the options for identifying medium of performance in the MARC 21 Formats in light of the new music genre/form terms being currently developed by the Library of Congress and the music community. The issues this paper address are very complicated and no perfect conclusions were reached. However, there was some decisions reached. It was agreed that the 048 is not a possible place for this information to reside for this use. There was also general agreement that the instrumentation for a work should reside in one field, rather than several fields, using subfields to give meaning to the information. It was not clear at the end of the discussion whether the 6xx block or field 382 would be the best place for this information to go. The committee bringing the discussion paper forward insisted that it was not possible for the instrumentation and the genre terms to go together.

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

Submitted by Kelley McGrath  
University of Oregon Libraries

On June 13, the U.S. national libraries announced their decision to conditionally implement RDA no sooner than January 1, 2013.

The executive summary includes an assessment of whether or not RDA met its self-proclaimed goals based on the test data. The national libraries identified some goals as met (e.g., provide a consistent, flexible and extensible framework for all types of resources and all types of content—although not everyone may agree with this, especially for digital content), some as partially met (e.g., be compatible with internationally established principles and standards) and some as not met (e.g., be written in plain English, and able to be used in other language communities). Some goals were not assessed by the test.

Issues the U.S. national libraries want to see addressed before the adoption of RDA include

- rewriting the RDA instructions in clear, unambiguous, plain English (prioritization of chapters and initial rewrites complete)
- improved functionality in the RDA Toolkit (searching and organization)
- credible progress toward a replacement for MARC

They also want to integrate full RDA record examples in MARC and other encoding formats in the toolkit, including examples of not-print materials, and lead and coordinate training.

They summarize the findings related to creation of the RDA records as follows

The overall average time to create an original RDA bibliographic record for the Extra Original Set, exclusive of consultation time and authority work time, was 31 minutes. The range of times reported, however, was from one to 720 minutes. A considerable decrease in record creation time was noted when the Coordinating Committee compared record creation times for the first ten RDA records produced by record creators with record creation times for the 20th record and above.

The overall rate of variance between RDA records was roughly comparable to the overall rate of variance between AACR2 records. RDA records, on average, contained more data elements than did their AACR2 counterparts. Discernible error patterns in both RDA and AACR2 were frequently related to the complexity of the resource cataloged. There were notable patterns of errors around some RDA concepts and instructions, however, such as providing access points for works and expressions manifested, when required. **Comments from catalogers indicated that many lacked confidence in their ability to find and interpret all relevant RDA instructions.**

One of the key findings for OLAC is that **“Participants working in non-textual formats, however, reported a much higher number of difficulties.”**

The U.S. national libraries also issued a 192-page full report (<http://www.loc.gov/bibliographic-future/rda/rdatesting-finalreport-20june2011.pdf>) with more details of their assessment of the test records and survey responses. The full report includes recommendations for the national libraries, for the Joint Steering Committee for Development of RDA (JSC), for ALA Publishing, for the community, including PCC, and for vendors. One of the recommendations for the **JSC was that it should “work with various specialized communities (e.g., moving image, music, rare materials, serials) to revise and add instructions.”**

Further down, in recommendation for specialist communities, they note that

The Coordinating Committee recognizes that there are internal disagreements within several of the special communities such as music, motion pictures, rare books, cartographic material, serials, and law regarding how well RDA works for their communities. The test did identify a few areas where there seemed to be some unanimity, at least among the testers, about certain rules that did not work well.

From the test findings it appears that the motion picture and sound recording communities found chapter 17 to be particularly problematic and had suggestions for changes. It is recommended these communities work together to submit proposals to the JSC for changing RDA in this area. If done promptly, the needed changes could potentially be in place prior to the 2013 implementation. The recent publication of the OLAC/MLA test group discussion summaries could provide a good starting point for these community discussions...

What still remains unclear is to what extent the specialist communities will adopt RDA, or continue to use their existing manuals as is, or adapt their current guidelines to be more compatible with RDA. If the generalist who uses RDA for the occasional special item in his or her collection follows one set of descriptive practices and the specialist follows a different set, what is the impact on identification and retrieval? Organizations like OCLC, Sky River, and the PCC should hold discussions with the specialist communities to address these questions.

While specialized communities can develop best practices for use within their groups without submitting rule change proposals to the JSC, the community as a whole will not realize the full benefit of applying a common standard unless the standard itself is changed. In today’s environment, where use of existing copy is an essential efficiency for many institutions, incorporating desired changes into RDA will help ensure that copy from a variety of sources will be as useful and usable as possible.

The report also describes the test methodology and discusses their findings, including an analysis of the common set test records and test surveys.

The analysis of the records for audiovisual materials in the common set notes:

COS audiovisual resources consisted of one film DVD, one streaming video (an online resource), one sound recording on CD, one audiobook on CD and one print poster. As with textual monographs, RDA and AACR2 records for audiovisual materials have roughly comparable error rates and total acceptable data elements. The RDA records for these materials have an average of 14 data elements per record, while the AACR2 records for these materials have an average of 12 elements per record, with correspondingly varying missing elements and error rates. Error rates under both sets of rules are somewhat higher than for textual monographs.

Because there was variety in the types of A/V resources chosen for the Common Original Set, patterns of errors are more difficult to identify. The sample size of each kind of resource is too small to draw many conclusions. That said, the Coordinating Committee did discover some general trends in errors that seemed to hold true across all of the A/V resources.

#### RDA Record Error Patterns: Audiovisual Materials

- Confusion about the use of abbreviations in RDA cataloging was more apparent in the records for A/V material than for other types of material.
- Nearly all participants omitted access points for the first work manifested in those records where recording it is required.
- The exception that says to name moving image works by title was not consistently applied by the participants.

#### AACR2 Record Error Patterns: Audiovisual Materials

- Errors in the GMD were common in these records.
- Inconsistency about how and when to provide 'source of title' and 'viewed on' notes was seen in several A/V records.

#### Common Error Patterns, Both RDA and AACR2 Records: Audiovisual Materials

- Recording complex publication information produced errors in A/V records as in records for other types of material.

Also of interest:

A representative of the moving image archive community indicated there is not likely to be an RDA update of the 2nd edition of *Archival Moving Image Materials*. The momentum in moving image archives is in updating the International Federation of Film Archive's cataloging rules...

The main documentation the Music Library Association (MLA) maintains for use with AACR2 is the Types of Compositions for Use in Music Uniform Titles document (<http://www.library.yale.edu/cataloging/music/types.htm>), which was developed in 1989 and is updated regularly as new terms are encountered. An MLA representative indicated that figuring out which of these terms are still relevant in an RDA context will be a major task; the revision is a volunteer effort...

An Online Audiovisual Catalogers, Inc., (OLAC) representative noted that several documents posted on the organization’s Website will need to be updated, also on a volunteer basis. One observation was made that updating will be more difficult for those groups whose members have less familiarity with RDA...

Several comments were made about the need for better instructions (“many instructions in RDA were not written clearly,” and “need more specialized instructions for cataloging moving images; existing RDA rules for Moving Images are confusing and incomplete”), and the organization of cataloging rules.

There is an interesting chart on page 91. Note that the three content types with the highest percentage of catalogers who had difficulties are audiovisual materials: computer program (77%), two-dimensional moving image (65%) and three-dimensional form (63%). The introduction to the table notes “While overall, 82% of the EOS survey responses indicated no difficulties in completing the records, responses from those working in non-textual formats indicated much more difficulty in creating their bibliographic records.”

Difficulties by Format, Extra Original Set Format	No difficulties	Had difficulties	Total	Percentage of responses who DID NOT have difficulties	Percentage of responses who HAD difficulties
cartographic dataset	5	3	8	63%	38%
cartographic image	580	62	642	90%	10%
computer dataset	8	7	15	53%	47%
computer program	3	10	13	23%	77%
notated music	172	59	231	74%	26%
performed music	59	45	104	57%	43%
spoken word	12	16	28	43%	57%
still image	63	65	128	49%	51%
tactile notated movement	1	0	1	100%	0%

tactile text	2	1	3	67%	33%
tactile three-dimensional form	1	0	1	100%	0%
text	3,891	853	4,744	82%	18%
three-dimensional form	3	5	8	38%	63%
two-dimensional moving image	40	75	115	35%	65%
Total	4840	1201	6041	N/A	N/A

The report expands on these findings with some general comments related to non-textual material

RDA aims to be a standard that provides basic instructions that are applicable to all types of resources. Some survey respondents agreed that it succeeded, but others questioned that accomplishment.

- "Just as AACR2 was focused on printed, published texts, RDA is focused on text-based electronic resources."
- "After attempting to create records for online and electronic resources for the very first time during the test, [I feel] RDA offers some badly needed guidance in this area."
- "Need more guidance for non-print formats."
- "I feel that RDA lacks the appropriate guidance on how to deal with electronic resources. This seems like a big oversight since our resources are increasingly electronic."
- "Format specialists should be consulted in the complete revision of rules intended for description of media based resources, visual resources, and artifacts."
- "In the area of physical description, RDA is inconsistent, providing detailed guidance for some formats, but not others (e.g., base material like acetate provided for films, but not audio tapes)."

There was also feedback on the new content, carrier and media type elements and the corresponding 3xx fields.

As previously mentioned, there were many comments related to the new elements for Types of Content, Media, and Carrier, particularly regarding the controlled vocabulary assigned for non-book material. While some applauded the elimination of the General Material Designation (GMD), others felt its loss could have a significant impact on current OPAC displays. Specific suggestions related to the 33X fields are included here.

- "33X terminology should reflect common usage."
- "There needs to be a way to "bundle" 33X elements when there is more than one set so related elements can be connected." [Note: MARC allows the use of \$3 to identify specific components.]
- "I think the Content/Media/Carrier needs to be scrapped in favor of an updated GMD listing... with terms in common use such as Blu-Ray or Wii game."

The report gives examples of specific feedback on electronic resources, moving images and music.

### *Electronic resources*

Comments for this type of material tended to focus on the allowable content types.

- "No content type for computer multimedia stuff like games."
- "Need better content options for video games and computer multimedia."
- "Needs to be some upgrades to the carrier types for mixed media carriers. For example, a DVD can serve as both a video disc and a computer disc."
- "Not as accommodating of electronic resources as it purports to be. The terminology allowed for electronic resources is very limited and not very enlightened. The term 'computer' for the type of medium is troublesome and dated at best. The use of online 'resource' is equally problematic mainly because the definition of 'online' strongly implies the necessity of a data connection which is not true of many electronic resources."

### *Moving image material*

Several issues overlapped the moving image and sound recording communities. The first had to do with the preferred source of information for title and not having an option to use the container. Some of both moving image and sound recording catalogers expressed enormous frustration with rule 17.10, which makes the predominant or first-named expression manifested a core element in a manifestation record if there is more than one expression embodied in the manifestation. They believe that in many instances this results in an access point that duplicates the title field or misleading information about a very small part of a larger entity. One cataloger went so far as to say that requiring an expression access point that duplicated an existing title was a misinterpretation of the intent of the rule. Some respondents reported that Chapter 17 of RDA in particular needs clarification and reconsideration. Other issues include the core element set, which was reported as often seeming inapplicable to moving image material. The unique language issues associated with this material (multiple soundtracks, dubbing, subtitles) are not perceived to be well handled in RDA.

- "Serious problems with the rules for describing moving image materials."
- "The lack of AACR2 1.1.G.1 [Rule for works lacking a collective title] is problematic for moving image cataloging and title frame titles."
- "This is another of the infamous predominant work with 'extras' which we used to catalog per AACR2 1.1.G.1 but now appears to be a collection in RDA with the

necessity to find a collective title. Which will be the container in this case. Which will automatically conflict with the title of the predominant work, so I'm qualifying the predominant work (the film *Gone with the Wind*) rather than the collection with the container title *Gone with the Wind*, which would just confuse everybody. This is a totally typical video, so if the JSC really wants us to do them this way, you'll have to get the word out because I can see from the Common Set records that people are cataloging the predominant work from the title frames and noting the subsidiary works, which I do not see support for in RDA."

- Defined core elements are often not present on unpublished A/V material, such as home movies, so it can be difficult to construct an RDA record. [this is a paraphrase]
- "Moving image cataloging has no equivalent to the word 'publish' and is primarily concerned with 'production' and 'distribution.' So emphasis on publication in RDA is problematic." [appears to be archival perspective]
- "City of publication is irrelevant and typically not readily available for film or video material. Country of production is important, but not addressed in RDA."
- "RDA does not provide clear instructions for recording different date types that are not associated with the creation of the manifestation, such as an interview date "[from a cataloger working on videos of unpublished oral histories]."
- "Instructions in RDA are unclear about how to bring out multiple expressions of a dubbed motion picture or a motion picture with soundtracks in more than one language. Patrons wouldn't like it if we treat subtitles and soundtracks equally."
- "It bothers me that this is clearly a particular expression of this film (the 2003 re-edit, though it's not clear if the original edit was ever released). Anyway, it seems like this info should be in the heading if we are doing that for language expressions, but since it's not a formally 'named' edition I don't know quite how to do it. This is actually the case with many films, where the different expressions will be differing aspect ratios and differing 'cuts' many of which are not as nicely formally named as 'Director's cut.' Sometimes there are multiple 'restorations' by different people or agencies, and many cuts differ without ever mentioning it on the packaging at all, so the cataloger has no clue."
- "Requiring an access point for the first constituent work in a compilation seems to be a misunderstanding of 17.8, if the contents of the resource are considered one 'work.' In that case, the title (245 \$a) should meet the requirements for an access point for that work."
- "Giving access to just the first work is either repetitive with the title and/or gives unequal weight to the first-named item."

### *Music*

As described above, Rule 17.10 was often cited as very problematic for this material. Also frequently mentioned were problems with the rules for creating expression records. Several commented that the rules seem to have a bias towards Western classical music and do not work well for popular or traditional music, or for the way music is often distributed and purchased today.



- “A recorded sound album should be recognized as a work itself, not just a compilation of component works.”
- “It appears that the elements ‘medium of performance’ and ‘form of work’ are relegated to providing disambiguation of works of the same name. Medium of performance is a significant mode of access for users, however. Vocabulary for this in RDA was taken directly from AACR2 and is inadequate for this use, is only partially controlled, and only includes Western instruments.”
- “Rules are focused on classical Western music. In popular and traditional music, performers are in large part the primary creators of the works they perform, but RDA does not recognize this.”
- “FRBR model does not work well for things like popular tunes. Where does one traditional musical work end and another begin?”
- “Big problems arise when creating preferred titles for musical works and expressions/manifestations. Do we still need standard combinations of instruments in preferred titles if we no longer have a rule of 3?”
- “For music, expression records are a big problem. Music catalogers have traditionally made some ‘super-expression’ authority records for all arrangements of that piece or all English translations of an opera. RDA has no provision for that type of expression record, only records for specific expressions.”
- “Many albums are now available for purchase via download, either as complete albums or as individual tracks, in one or more digital file formats. RDA does not address this situation. Is the downloadable version another manifestation of an album? What if users buy only one or several tracks?”
- “Librettos should be under composer, as this is considered the main work in RDA. Otherwise the libretto does not file with other iterations of the work.”
- “‘Phonogram copyright’ is not the equivalent to ‘copyright’; it also represents the year of publication, so to give both elements is senseless and confusing to provide both.”
- “Sections on physical characteristics of sound recordings need to be refined, especially what is considered standard, vs. what should be noted. Having to record terms like ‘optical and 1.4 m/s’ in the 300 field is redundant, since these are fixed characteristics of the physical carrier. Most users probably do not understand the difference between optical and magnetic discs.”
- “Rules for sound recordings are not relevant to the materials, frequently emphasizing totally unimportant aspects.”
- “The treatment of music manuscripts does not seem adequate, because other than a code in the Leader and a ‘holograph’ note, there is no way in the bibliographic record to indicate that an item is a manuscript. We need to be able to say ‘1 manuscript score.’”
- “There is no provision in RDA to include performer names in the contents note; the performer name would seem to be a key element of information about an expression, i.e., a performance of a work. This is a loss to users.”

### *Recommendation from Coordinating Committee*

The Coordinating Committee recognizes that there are internal disagreements within the Moving Image and Music communities. It is recommended these communities work together to submit proposals for changing RDA in this area.

Also...

“RDA doesn't work well for manuscripts or two or three dimensional art works (but neither did AACR2). I think there is going to be trouble in deciding how to deal with entities which are simultaneously a work, expression, manifestation and item.”

OLAC has its work cut out for it based on these recommendations.

OLAC should participate in the national effort to develop training materials and guidelines for specialist cataloging communities. We should develop training materials and best practices for audiovisual materials. This will be discussed later on in this meeting.

OLAC should examine the issues raised by the OLAC/MLA test group and other known issues. We should prioritize those that we would like to develop proposals for changes to RDA and submit the most important changes in time to meet the January 2013 deadline.

CC:DA is already beginning to discuss potential changes to RDA. The two that impact ALA the most are those submitted by MLA.

### ***Container as a Source***

This proposal has two related parts.

1. For sound recordings, catalogers can only use titles not from the disc label if there is no title on the title frames. This is not always desirable when there is a collective title on the container or disc label, but not on the disc label. Patrons are likely to identify the published item by the collective title.

How this impacts moving images is less clear. RDA's hierarchy for preferred sources of information, especially for titles is as follows.

RDA 2.2.2.3 preferred source for moving images

1. Title frames or screens
- 2a. Label on disc or cassette
- 2b. Embedded textual metadata
3. Other source that is part of the resource

However, RDA 2.1.2.2 (Resource Issued as a Single Unit) says to prefer a single source identifying the whole, which would seem to favor a title from the disc label over multiple title frames.

Non-collective titles for moving images with many statements of responsibility lead to 245 fields that are long and difficult to parse.

MLA proposes that when the preferred source does not have a collective title, but another source does, then the source with the collective title should be used.

2. When is a container part of the resource itself?

RDA's definition of when a container is or is not part of the resource is unclear because it uses only extreme examples:

- A box in which a game or kit is issued is considered part of the resource
- A box created by an owner is not

RDA leaves its intent for more typical containers, such as those that CDs or DVDs come in, unclear. MLA proposes that RDA clarify that container issued by the publishing body are to be considered part of the resource itself and give an additional example of a box containing CDs.

***Artistic and/or Technical Credit***

RDA defines artistic and/or technical credit narrowly as referring to contributions to the “artistic and/or technical production of a motion picture or video recording.” Based on AACR2 6.7B6, catalogers have been record sound recording producers and engineers as artistic and/or technical credits in the 508 field in MARC. MLA proposed to add the language “or sound recordings” to the film and video limit in this instruction. When MLA shared a draft of this proposal with OLAC, we strongly recommended that the instruction not be limited to specific types of material. For example, these types of credits might be useful on records for video games and computer multimedia. However, coming up with a more general definition was not practical in the time frame left to get the proposal on CC:DA's agenda. Therefore, MLA submitted its original proposal with the possibility of a broader definition left as an alternative for CC:DA to follow up on.

***“Selections” as used in RDA Chapter 6***

This is a proposal from LC highlighting RDA's inconsistent use of the term selections as an attribute describing the work or the expression, particularly in the context of the construction of access points. In many cases, consecutive parts include an option to use “Selections” as part of the work access point as an alternative to naming the parts. For non-consecutive parts, “Selections” is described as an attribute of the expression. LC recommends:

- Treating the preferred title for a part as a work attribute across the board
- Replace the term “Selections” with “Extracts” or a similar term for a clear break with the past

## RDA Testing

Submitted by Kelley McGrath  
University of Oregon Libraries

The U.S. national libraries' RDA test and the work of the OLAC/MLA test group have officially finished. In May, a summary of many of the group's wiki- and email-based discussions was posted on the OLAC web site (<http://www.olacinc.org/drupal/?q=node/432>) and announced to the cataloging community. These reflect the group's experiences as they tried to apply RDA to music and audiovisual materials. The summaries are grouped as follows:

1. Major issues related to the use and construction of access points, especially expression access points:

[http://www.olacinc.org/drupal/capc\\_files/MLA-OLAC\\_RDAtest1.pdf](http://www.olacinc.org/drupal/capc_files/MLA-OLAC_RDAtest1.pdf)

2. Other unresolved issues for further investigation, discussion and follow-up:

[http://www.olacinc.org/drupal/capc\\_files/MLA-OLAC\\_RDAtest2.pdf](http://www.olacinc.org/drupal/capc_files/MLA-OLAC_RDAtest2.pdf)

3. Issues that the test group thought were satisfactorily resolved:

[http://www.olacinc.org/drupal/capc\\_files/MLA-OLAC\\_RDAtest3.pdf](http://www.olacinc.org/drupal/capc_files/MLA-OLAC_RDAtest3.pdf)

The documents summarize the group's discussions and note issues that need to be addressed. They are not meant to be the official position of either MLA or OLAC nor do they necessarily represent the opinion of all the participants. The group hopes that they will be useful to others trying to implement RDA for music and audiovisual materials.

I would like to thank the OLAC and MLA testers for the tremendous effort they put into working with and understanding the RDA text. Through their work many of the issues facing catalogers of audiovisual materials when working with RDA have been identified and clarified and a start has been made on addressing some of these problems.

## Moving Image Work Grant

Submitted by Kelley McGrath  
University of Oregon Libraries

Bill Kules, Chris Fitzpatrick and I wrote a short paper about the OLAC Work-Centric Moving Image Discovery Interface Prototype (<http://blazing-sunset-24.herokuapp.com/>) that was accepted by JCDL (ACM/IEEE Joint Conference on Digital Libraries, <http://www.jcdl2011.org/>). Bill Kules presented the paper at the conference in Ottawa, Canada on June 14.

I have applied for an internal grant at the University of Oregon to develop a sustainable, extendable and efficient framework for extracting information related to movies and television programs from existing MARC bibliographic records for publications, such as DVDs, using the XC Metadata Toolkit (<http://www.extensiblecatalog.org/>). This effort will build on the work of the OLAC Moving Image Work-Level Records Task Force's proof of concept as described in the task force's report (part 4 at <http://www.olacinc.org/drupal/?q=node/27>) and in the *Code4Lib Journal* (<http://journal.code4lib.org/articles/775>). The project will attempt to build the core of a record based on the abstract Work entity from the Functional Requirements for Bibliographic Records (FRBR) conceptual model by identifying and normalizing values for key attributes of moving images, such as director and original date.

In conjunction with this initial project, I will be seeking volunteers to help compile a list of function terms for moving image roles in various languages in order to aid with matching transcribed names and functions with authorized access points for names.

## MOUG/OLAC Liaison Report

Submitted by Mary Huisman  
University of Minnesota

### News from MOUG

Several appointments were made since during the past year:

- MOUG web-keeper: Tracey Snyder (Cornell University)
- E-ballot manager: Alan Ringwood (University of Texas, Austin)
- Reference and Collection Services Coordinator: Rebecca Belford (University of Buffalo)
- NACO Music Project Advisory Committee chair: Alan Ringwood (University of Texas, Austin)

MOUG has also established a travel grant, the A. Ralph Papakhian Travel Grant, to honor the memory of Ralph. Travel grants for the meeting were awarded to three candidates this year. The Papakhian family was presented with a framed copy of the MOUG program honoring Ralph.

Alice LaSota (University of Maryland) was the winner of the MOUG Distinguished Service Award, for her accomplishments in the creation of series authority records for music. LaSota is the ninth recipient of the award.

### Annual Meeting 2012

MOUG's annual meeting will be held in conjunction with the Music Library Association meeting at the Fairmont Dallas Hotel, Dallas, Texas, in February 2012. Watch for registration and program information at the MOUG website (<http://www.musicocclusers.org>). Additional information about the Music Library Association meeting can be found at <http://mla2012.musiclibraryassoc.org/home> (be sure to view the video!)

## 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. It should include a brief description of pertinent qualifications and professional activities. All OLAC personal members are eligible to serve and self-nominations are highly encouraged. For those who wish to nominate an OLAC colleague, please be sure that person is willing to serve.

### OVERVIEW OF DUTIES

#### **Vice President/President Elect**

This office is elected annually and serves four years: a one-year term as Vice President, followed by one year as President, one year as Immediate Past President, and one year as Past/Past President. S/he performs all duties delegated by the President and presides at meetings when the President cannot attend. The Vice President/President Elect is expected to attend OLAC Membership and Executive Board meetings (held during ALA conferences) while in office. The Vice President is also responsible for the OLAC Program at the ALA Annual Conference, should OLAC decide to sponsor a program. The OLAC President presides at all OLAC Membership and Executive Board meetings, is or appoints OLAC's Observer to the OCLC Members Council, submits quarterly reports for the *OLAC Newsletter*, and works closely with other members of the OLAC Executive Board in guiding the operations of the organization. The Immediate Past President serves as Chair of the OLAC Awards Committee and as a member of the OLAC Executive Board. The Past Past President serves as Chair of the Elections Committee.

#### **Secretary**

The incumbent of this office serves a two-year term, with the election being held in years alternating with that of the office of Treasurer. The next Secretary's term will extend from Summer 2010 to Summer 2012. The Secretary attends all Membership meetings and must meet the same attendance requirements as the Vice President/President Elect. The Secretary is responsible for preparation of official minutes of all Membership, Board and/or special meetings of OLAC, to be published in a timely manner in the *OLAC Newsletter*, as well as reporting as needed at the semi-annual OLAC Membership meetings. The Secretary also handles any official OLAC correspondence at the direction of the President or the Executive Board and maintains the *OLAC Handbook*. Members of the Executive Board receive a \$100 stipend for attending OLAC Membership meetings during ALA conferences.

Anyone who wishes to run for either of these positions should submit a brief description of their qualifications and professional activities in time for them to be printed with the ballot. The deadline for this information is December 31, 2011.

Please submit all requested nomination material in electronic form to:

Patricia Loghry  
Chair of the Elections Committee  
121D Hesburgh Libraries  
Notre Dame, In. 46617  
[ploghry@nd.edu](mailto:ploghry@nd.edu)



**NEWS AND ANNOUNCEMENTS**

**Barbara Vaughan, Column Editor**

**Greta de Groat Receives the Nancy B. Olson Award**

Wording from the plaque:

OLAC...

presents the 2010 Nancy B. Olson Award  
to

Greta de Groat

For her valuable contributions to the cataloging of audiovisual materials, to OLAC, and to various national organizations and committees;

For serving as OLAC's first official CC:DA liaison from 2004-2009;

For skillfully and persistently representing the perspectives of OLAC and the audiovisual cataloging community throughout the development of RDA: Resource Description & Access;

For serving as an advisor to the task force on best practices for Library of Congress genre/form headings for moving images;

For being instrumental in lobbying for the creation of LCRI 25.5B on Uniform Titles for Motion Pictures, Television Programs, and Radio Programs in response to the need for clear guidance for moving images in order to meet BIBCO requirements;

For authoring Future Directions in Metadata Remediation for Metadata Aggregators, a report commissioned by the Digital Library Federation to describe potential methods for improving the usefulness of disparate metadata aggregated from multiple sources;

On this date, Sunday, June 26, 2011,

Pat Loghry, President

Nancy B. Olson Award Committee: Julie Moore, Sandra Roe

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## RDA and Music Basics: Sound Recordings

Overview of the significant differences in cataloging sound recordings between AACR2 and RDA, addressing both descriptive elements and access points. Examples of RDA in MARC 21 Bibliographic and Authority records provided.

Attendees should have some experience cataloging sound recordings under AACR2 and want to learn more about how cataloging practices for these resources will change with RDA. Presenter Kathy Glennan is the Head of Special Resources Cataloging at the University of Maryland and has more than 25 years' experience cataloging scores and sound recordings. She currently chairs the Music Library Association's Bibliographic Control Committee and has been active in ALA's Committee on Cataloging: Description and Access, where she worked on development of RDA instructions in relation to music materials. She has given numerous presentations on RDA, FRBR, and MARC Formats issues. She holds an MLS from UCLA.

Wednesday, October 26, 2011

Sessions are intended to last 1 hour, starting:

11am Pacific | 12 Mountain | 1pm Central | 2pm Eastern

### Fee

ALCTS Member (individual)	\$39
Non-member (individual)	\$49
International (individual)	\$39
Group	\$99

Applies to group of people that will watch the webinar together from one access point. Group rate the same for members and non-members.

The webinar is recorded and the one-time fee includes unlimited access to the webinar recording. All registered attendees will receive the link to the recorded session so if you are unable to attend the webinar at the time it is presented, you will have the opportunity to listen to the recording at your convenience.

### ***How to Register***

To register, complete the [online registration form](#) or [register by mail](#) for the session you would like to attend.

### ***Contact***

For questions about registration, contact ALA Registration at 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 webcasts, contact Julie Reese, ALCTS Events Manager at 1-800-545-2433, ext. 5034 or [jreese@ala.org](mailto:jreese@ala.org).

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## LCGFT discussion paper: franchise- and character-based terms

In the spring of 2007 the Library of Congress embarked upon an experiment to create genre/form terms in the area of moving images (films, television programs, and video recordings), along with policies for assigning them. Over five hundred genre/form terms for moving image works have been approved, and it has been almost three years since LC implemented them.

With any experiment, policies that look reasonable in theory may be less so in application. This is perhaps particularly true in the case of the moving image genre/form terms, since the Policy and Standards Division's plans for the genre/form thesaurus, now entitled *Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT)* have evolved and matured since the moving image project began.

The recent separation of the genre/form thesaurus from *LCSH* provides an opportunity to reexamine the genre/form terms approved during the moving image experiment in order to determine whether they fit into the overall thesaurus, given the trajectory of development.

One ongoing issue has been what may be loosely referred to as "character- and franchise-based terms." These are authorized terms that include either a character name or the title of a film or television program (e.g., **Die Hard films**; **Dracula television programs**; **Scooby-Doo television programs**; **Star Wars films**). PSD proposes cancelling all of these terms from the genre/form thesaurus, and has posted a discussion paper explaining the rationale on the Library of Congress' genre/form web page, <http://www.loc.gov/catdir/cpso/genreformgeneral.html>. The direct URL for the paper is [http://www.loc.gov/catdir/cpso/character\\_franchise\\_disposition.pdf](http://www.loc.gov/catdir/cpso/character_franchise_disposition.pdf). PSD requests input from interested parties before making a final decision.

*Comments will be accepted through September 30, 2011. They may be sent to Janis L. Young, LC's genre/form coordinator, at [jayo@loc.gov](mailto:jayo@loc.gov).*

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

## REVIEWS

Katie Eller, Column Editor

### *Broken Pieces : a Library Life, 1941-1978*

By Michael Gorman

In this engaging memoir, Michael Gorman shares the story of his life from his birth in England until he moves to the United States permanently in 1978 to become the Director of Technical Services at the University of Illinois. He begins the narrative with a description of his parents' courtship and marriage followed by his idyllic early childhood in rural England during the Second World War. Following his father's demobilization from the army at the end of the war, the family moved to London where Gorman became increasingly disconnected from his family and discovered public libraries. His descriptions of growing up in a financially struggling Irish Catholic family provide insight not only into the man he would become but also the challenges that were faced by the families of World War II soldiers as they resumed civilian lives in post-war London. Those who know Gorman solely as a scholar and respected educator will be surprised by the revelation that he left school at the age of 16 and applied for his first library job because a family friend told his mother, "Mikey likes reading; why doesn't he work in a library?" (p. 49). Thus begins his delightful account of his experiences working with various bohemian librarians in the Hampstead Public Library and his subsequent three-month trip to France.

Library school students and people considering a career in library science will find the story of how the newly married Gorman attended library school despite his lack of academic qualifications inspiring. As he describes his experiences studying at the library school in Ealing Technical College, Gorman compares the course work and educational philosophy of the late 1960s with that of today's library schools in the United States and the United Kingdom. This discussion is picked up again in later chapters, when he describes his one-year visiting teaching appointment at the University of Illinois, Urbana-Champaign.

At the end of chapter six, "Paris, 1960-1962," he describes his life as being fragmented between work, his social life with his friends and colleagues, and his life with Anne Gillett, who became his wife. This theme of his life being fractured into three lives or parts continues through the end of the volume. Increasingly, the "lives" of librarianship and social life crowd out his family life. As the memoir enters the final third, his references to family become increasingly rare as he becomes more and more consumed by his career, especially the development of the *Anglo-American Cataloguing Rules*. Although the reader gets occasional insights into Michael Gorman the private person through stories about the cultural shock experienced by his wife and young daughters when they move to Illinois from England, the focus is on his professional personae and achievements. While this shift in the narrative reflects the reality of his life during this time, readers who are interested in the book as an autobiography may be frustrated by the increasingly vague allusions to family. The chronological sequence of the memoir ends with the sentence, "Two weeks later, Anne, Emma, and Alice arrived to begin a new life in America with then unforeseeable consequences for each of us" (p. 198). At this point, readers are left wondering what will happen to the Gormans even though they have been warned

by the subtitle that this memoir ends in 1978. One can only hope that Gorman will write a sequel that will recount the remainder of his career.

Kudos to Gorman for exploring the subject of his struggles with emotional illness, which included fear of flying, stage fright, and panic attacks. In an era when emotional illness could end one's career if it became public, Gorman developed an array of coping strategies that allowed him to pursue the editorship of AACR2 which involved international travel. His honesty about his affliction is refreshing. The reader comes away with a respect for Gorman rather than pity.

Much of Gorman's professional life during the time covered in this memoir was devoted to the development of AACR2. His descriptions of the numerous international meetings and his role as co-editor shed light on the challenges of creating a new standardized cataloging code. Catalogers who have been involved with the recent tests of RDA will find the final chapter, which is devoted to development of the *Anglo-American Cataloguing Rules*, insightful, especially the explanations of why certain decisions were made. Some of the material covered in this final chapter will also shed light on his current views on cataloging in general and RDA, as well as his decision to join forces with Mac Elrod to create the MRI.

Gorman's memoir will appeal to any librarian or library school student who enjoys reading autobiographies and memoirs. It will especially appeal to catalogers and library educators interested in how cataloging and library education has changed. However, non-catalogers may find themselves getting a bit bogged down in the details about the codification of the British Library's in-house cataloging rules and the creation of AACR2.

Published in 2011 by: ALA Editions, Chicago, Ill. (xii, 232 p. : ill.) ISBN: 978-0-8389-1104-4 (pbk.; \$35.00).

Reviewed by:  
Kathleen Koontz  
Contract Cataloger  
Franklin, Tennessee

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## ***Practical Strategies for Cataloging Departments***

Edited by Rebecca L. Lubas

*Practical Strategies for Cataloging Departments* is a 2011 work from many of the experts in the cataloging profession, including many names you will recognize from OLAC conferences and the OLAC board. This means that AV cataloging is not marginalized in the cataloging discussions within, as it tends to be in other works.

Cataloging is such a broad subject and it is often difficult to make a cohesive work out of such disparate topics. However, editor Lubas pulls this off in this work, while at the same time, including chapters that stand well on their own. This work is very practical, as indicated by the title. Cataloging departments can implement some of the ideas immediately.

After a brief introduction from editor Lubas, Robert Bothmann dives into an excellent but concise rundown of the history of changing cataloging rules, going back to Lubetzky's *Code of Cataloging Rules*. It is great to remember where catalogers came from before the change to RDA, and this history should be read in Introduction to Cataloging classes in library school and by beginning catalogers. The discussion includes reactions to changes in the past and how the reactions are similar and different today.

Bonnie Parks writes a chapter on major changes in Library of Congress cataloging policy in the last five years, and she includes practical solutions for libraries to catch up or change their policies and workflows based on these changes. Each change discussion has a background or history of the change, along with links or references to documentation on each change. This is especially useful for cataloging managers who may have missed these changes or for new cataloging managers.

How to train catalogers is a subject on many cataloging managers' minds these days, and two chapters in the book cover training. The OCLC trainer and columnist Jay Weitz gives a rundown on how he structures his cataloging training workshops. He gives an introductory section with basic topics and foundation, but then opens the floor to difficult questions that the class may struggle with. He has taught enough classes and is familiar enough with the troublesome areas of cataloging to have a good idea of what questions may come up, and he has sections ready on those topics with full record examples. Deborah Lee includes a good outline on how to prepare for training catalogers in her chapter and what to include, particularly thinking of styles of the 21<sup>st</sup> century learner. These chapters are timely as cataloging leaders determine how to train other catalogers on RDA and FRBR.

Many of the other chapters in the book deal with collaboration, in particular, a very practical chapter on working with vendor cataloging by Lubas, and a chapter on collaborating with other library departments by Sever Bordeianu and Lubas. This chapter on determining whether or not to outsource is specific to catalogers. The department collaboration chapter covers some of cataloging's natural collaborators, such as acquisitions, collection development, and systems, but introduces others, such as document delivery, administration, and digital libraries.

Other chapters include discussions on digital cataloging, repurposing MARC, and how metadata can add value to grant-funded projects.

One of the most valuable sentences found in the whole book was this quote, which sums up the attitude of the work, “The sea change required in our community is reaction time and flexibility. We can no longer afford to take three years and three proposals to revise a single subfield code in a metadata standard,” (p. 109).

This book is highly recommended to cataloging managers, both experienced managers and those new to management. Also, even though the title might also indicate that this book is only for cataloging department managers or administrators, many of these ideas can be implemented solo or within a smaller part of the department, or as a recommendation to your cataloging manager.

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Published in 2011 by Libraries Unlimited, Santa Barbara (x, 117 p.) ISBN 978-1-59884-492-4 (pbk.: \$45.00). Series: Third Millennium Cataloging.

Reviewed by:  
Christina Hennessey  
Cataloging Librarian  
Loyola Marymount University  
Los Angeles, CA

## OLAC CATALOGER'S JUDGEMENT: QUESTIONS AND ANSWERS

Compiled by Jay Weitz



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### Mini Change Helps Macro Help You

**Question:** I am trying to figure out how to generate a field 034 from a field 255 using the OCLC macro when there is more than one 255 field. It seems that the 034 will only generate from the first 255, no matter whether I highlight the second 255 or not. Do you have some advice?

**Answer:** My colleague Robert Bremer, who is our macro specialist, has these comments: "The macro just looks for the first 255 in the record. So, I would suggest that after generating the 034 based on the first 255, temporarily change the tag of the first 255 to 250, run the 034 macro again to generate a second 034 based on the second 255, etc., then change the tag of the 250 back to 255." See how that works for you.

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### Speaking the Same Languages

**Question:** We are running across Visual Materials records that are created using what might be prepublication data. In many cases, the languages are not matching up with what we have. We know that prepublication data is often from sell sheets or Web pages provided by the distributors, not always from the container. Prepublication data are not an ideal source for accurate information, as we all know. Is it OK for us to upgrade these and edit the languages to match our resource or would it be best to create a new record due to the languages not matching? I hate to mess with another library's record but at the same time, duplicates are not our friends and I'm thinking that DDR will more than likely merge if we entered a new record.

**Answer:** DDR generally has a large amount of trouble distinguishing videorecordings that have different language options, even in cases where there are actually differing versions of the video. Some catalogers are more or less thorough than others in delineating exactly what languages may be available on any single video. There can be contradictory information about language availability within the same DVD (on packaging and on a displayed menu, for instance). Sometimes, on-screen menus include language options that cannot actually be chosen. So there can be contradictory descriptions of even the same published resource (let alone prepublication data), dependent upon how deeply the cataloger delves into the various language options. With this in mind, it will usually be prudent to take such language data, whether in a bibliographic record, in prepublication data, or within the resource itself,



with some skepticism. My suggestion is to err on the side of editing existing records that may be close, but not exact, matches to what is in hand.

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### Looser Usage

**Question:** Some catalogers use the GMD “kit” for any resource that has to be assembled rather than a GMD that represents what the resource actually is, such as “model”, “diorama”, “game”, or “realia”. They argue that patrons think of these things as “kits” that need to be put together and so that’s what we should call them, as well. What’s your take on this practice?

**Answer:** Some catalogers occasionally forget that, for better or for worse, we have our own specialized definitions of terms that have much looser meanings in common English usage. The AACR2 Glossary (Appendix D) has the following introductory note: “This glossary contains definitions of most of the technical bibliographic and cataloguing terms (for both print and nonprint materials) used in these rules. The terms have been defined only within the context of the rules. For definitions of other terms, consult the standard glossaries of bibliographic and library terms or technical dictionaries.” This includes words such as “score,” “kit,” “edition,” and “graphic,” each of which has a definition that is much more narrow than what we find in everyday speech or that has a particular emphasis to allow catalogers a certain precision in bibliographic description. The AACR2 definitions of “kit” are deliberately narrow and have only a glancing relationship to how the term gets used in the real world: “1. An item containing two or more categories of material, no one of which is identifiable as the predominant constituent of the item; also designated ‘multimedia item’ (q.v.). 2. A single-medium package of textual material (e.g., a ‘press kit,’ a set of printed test materials, an assemblage of printed materials published under the name ‘Jackdaw’).” Whether this was a wise way for AACR2 to have defined “kit” isn’t for me to say. But while we catalog using AACR2, perhaps conscientious catalogers can agree (paraphrasing Lewis Carroll) that “a word means what AACR2 says it means, neither more nor less.”

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### WAV Your CDs Goodbye

**Question:** I’ve encountered my first compact discs containing MP3 files. I looked at the records in OCLC, and at LC’s “New Sound Recording Formats” guidelines, and decided that the GMD was “electronic resource” but the 300 was still “1 sound disc.” Then I looked on the OLAC website and discovered to my delight that you can search across newsletters. There was a Q&A about MP3, and part of your response said “(presumably on a CD-ROM)...” Looked back at the LC guidelines, and the definition says, “These may be stored in any of the standard ER formats: floppy discs, CD-ROMs, etc.” Doesn’t mention standard audio compact disc. Uh-oh! If the thin shiny thing that’s 4 ¾ inches across has MP3 files, is it by definition a CD-ROM, and that’s what goes in the 300 and 007? The only indication that it is sound is in subfield \$b of the 300, where you add “MP3 file”?

**Answer:** Here is my (possibly flawed) understanding. Standard audio compact discs, which have been around commercially since 1982, store sound in WAV format, have a capacity of roughly 75 minutes of sound, and must spin in order to play. MP3s are sound files that are much more compressed and therefore much smaller than those in WAV format; many more MP3 files than WAV files can be stored on a disc because of this greater compression. Unlike standard audio compact discs, a disc containing MP3 files apparently does not have to spin all the time. If I understand correctly, if you've got MP3 files on a tangible medium, it cannot by definition be considered a standard audio compact disc. MP3 files on a tangible medium would be on a CD-ROM or on one of the many varieties of recordable disc media such as CD-R (Compact Disc-Recordable) or CD-RW (Compact Disc-ReWritable). There probably was a time when you might sometimes be able to distinguish between those types of discs by what sort of machine they would play on, but that time is long gone. If you have MP3 files on a disc, following the LC "New Sound Recording Formats" (<http://www.loc.gov/catdir/cpsoundrec.pdf>) recommendations, the storage medium would be whatever variety of disc you've got, CD-ROM, CD-R, CD-RW, etc. That would be reflected in the 007 field, in the "electronic resource" GMD, and in the 300 field. Of course, because these are sound files, the Type Code of the record would be "j" or "i" and you'd have a Sound Recording fixed field, plus a Computer File 006 with "File" coded "h" for "sound."

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### File Under "Oops"

**Question:** I'm looking for some examples of when you would use the code "h" in "File" (008/26 in the COM format). Also, would you or your patrons think of these materials as audio recordings? The only examples I can think of are MIDI files, like OCLC #54098008 or #43015802. "File" is the mnemonic for 008/26 in the COM format, defined in *Bibliographic Formats & Standards* (<http://www.oclc.org/bibformats/en/field/file.shtm>) as "The type of computer file. Such a file is a body of information or instructions encoded so that it requires the use of a computer (or related machine) to be properly interpreted. This term encompasses both data files (numeric files, representational files and text files) and computer program files." Code "h" within File is defined as "Sounds. File has data encoding computer producible sounds." I'm asking because in our local system, anything with 008/26 "h" currently is assigned the content type "audio recording." However, 008/26 "h" means other things in other formats, causing some items to be incorrectly assigned "audio recording", so we need to make a change to qualify this by only things that are in the COM format (i.e. Leader(06)=m). But I'm wondering if, even within the COM format, these are materials that our patrons would think of as "audio recordings."

**Answer:** Sound recordings that have electronic resource aspects -- including CD-ROMs and other disc varieties that contain MP3 files, streaming and downloadable audio files accessed remotely, and Playaways -- would all have the "File" element coded as "h". That element would usually be in the Computer File 006/09, however, because the fixed field would correctly be coded as a Sound Recording (Type "i" or "j"). The proper coding of a Computer File record (Type "m") with File coded "h" in 008/26 would not be nearly as common because of the restrictions of Type "m" to "computer software (including programs, games, fonts), numeric data, computer-oriented multimedia, online systems or

services” in MARC 21. In MARC, as you well know, the 008/18-34 positions can vary widely from bibliographic format to bibliographic format and in each case, the correct interpretation of any one of those 008 positions is defined by and dependent upon the Leader/06 (Type of Record) code associated with the 008 in question.

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### Once More into the (Playaway GMD) Breach

**Question:** I’ve been looking at bibliographic records in OCLC for both the Playaway and the Playaway View. The 245 subfield \$h is “electronic resource” for the Playaway View but for the Playaway I’ve seen some that have “sound recording” and some that have “electronic resource”. Electronic resource generally means a computer is needed for access. A computer is not needed to access either a Playaway or a Playaway View, so why use electronic resource as the GMD? It seems like the GMD for the View should be “videorecording” instead. Are they considering the View player itself to be a type of computer? If so, then why isn’t the Playaway device a type of computer too? Up to now our patrons generally know that “[electronic resource]” means there is no actual, physical item in the library. Using that term for the Playaways would be confusing in that regard because there will be a physical item they can check out. So, which is the correct GMD for each of these materials?

**Answer:** Playaways, and especially the issue of the proper GMD, have been the subject of discussion and contention pretty much ever since the format surfaced in 2005. Please see the OLAC "Guide to Cataloging Playaway Devices Based on AACR2 Chapters 6 and 9" ([http://www.olacinc.org/drupal/capc\\_files/playawaysPDF.pdf](http://www.olacinc.org/drupal/capc_files/playawaysPDF.pdf)), particularly pages 4-5 about the GMD. There was considerable discussion both within the task force that created the “Guide” and later on within OLAC about the GMD decision. Here is what I wrote at the time in explanation.

Please allow me to explain briefly the Task Force's choice of "electronic resource" as the GMD for Playaways. As is mentioned in Section VII of the draft "Guide," members of the group discussed the GMD question long and hard. There were excellent arguments on both sides of the GMD divide and when it came down to an actual vote, "electronic resource" won out over "sound recording" only narrowly. First let's say that any GMD recommendation (in fact, the entire set of guidelines about cataloging Playaways) is an interim solution as we all await the sage proclamations of RDA. Which will, eventually, solidify into some final form. And which will, of course, solve all cataloging problems. (He said with tongue firmly in cheek.)

For the OLAC audience, there is no need to go into the long history of GMDs and their roots in an era when a sound recording was a sound recording was a sound recording and even when a computer file was a computer file was a computer file and the twain did not meet. That era is long past and no amount of fiddling with AACR2 1.1C is going to resolve any of the GMD's vast and growing limitations. For better or worse, one upshot of AACR2 1.1C3 is that the GMD "electronic resource" trumps any other GMD when there is a conflict, just as "microform" would trump other GMDs (or the absence of a GMD) in a parallel circumstance.

Playaways are functionally "sound recordings," to be sure, but as resources to be cataloged according to AACR2 they differ in one particularly vital aspect from other things that we've traditionally regarded as "sound recordings" in the GMD sense. Vinyl discs, CDs, audio cassettes, reel-to-reel tapes, and cylinders were all media that were inserted into, or placed onto, another device to be played and listened to. By themselves, they were silent and more-or-less inert.

Playaways, on the other hand, are the devices themselves, devices inextricably linked to the proprietary ACELP (Algebraic Code Excited Linear Prediction) files that are embedded within them. (And which the Playaways folks insist are not hackable and will never be made to be programmable by users.) We recognize the "sound recording-ness" of the Playaway by using the Sound Recording workform (Types "i" and "j") and AACR2 Chapter 6, among other things. We recognize its "electronic resource-ness" by using the GMD "electronic resource" and a computer file 006 field, and by referring to AACR2 Chapter 9, among other things.

If you follow the Task Force's guidelines, Playaways will be retrievable in WorldCat regardless of whether you consider them a sound recording or an electronic resource. Other sorts of sound recordings that we catalog using the Sound Recordings workform, yet consider to have the GMD "electronic resource" under 1.1C3, include streaming audio files and MP3 files. These are imperfect treatments of complex situations under sometimes antiquated cataloging rules. But if we can impose just a modicum of order and standardization, we have a better chance of moving into a post-AACR2 cataloging world with bibliographic records we might be able to do something with.

Please believe me when I tell you how difficult a decision it was concerning the GMD, one that we discussed long and hard over several weeks of e-mails. (It's probably not much of an exaggeration to say that the time we devoted to the GMD question was greater than the time we spent on everything else combined.) We knew that we'd get a lot of negative feedback about it, but the way the rules are currently written, there didn't seem to be much leeway.

If you make available to your users such resources as MP3 files, streaming audio files, and/or other sorts of remotely-accessed audio files (which should also properly have the GMD "electronic resource" according to the rules, but are no less "sound recordings" in a functional sense than are Playaways), do you find that your users are confused? Are they similarly confused by the "electronic resource" GMD on a remotely-accessed textual resource that they may be thinking of as being available in print form? Additionally, many electronic resources such as computer software (including programs and fonts) and numeric data that are stored on such tangible media as CD-ROMs, DVD-ROMs, and older varieties of floppy discs, would also properly have the GMD "electronic resource", not only remotely accessed resources.

Since those words were written, the "Playaway View" came into existence, in 2010. A record for a "Playaway View" would be on the Visual Materials format, Type (Leader/06) coded "g", TMat (008/33) coded "v". Form of Item (Form), which in Visual Materials is 008/29, should be "q" because it is direct

electronic (and you'll notice that "Playaway device" is included in the definition in MARC, <http://www.loc.gov/marc/bibliographic/bd008v.html>). The Computer File 006 (006/00 coded "m") should have the File position (006/09) coded "c" for "Representational," which includes both still and moving images. I confirmed that several years ago with LC and it is documented in BFAS (<http://www.oclc.org/bibformats/en/field/file.shtm>). The correct GMD remains "[electronic resource]". If you are creating original master records for any form of Playaway, *please* follow this nationally agreed upon standard of "electronic resource" for the GMD. You *absolutely always* have the option of using whatever GMD you want, and think will be most useful to your users, for your local editing of the record.

## NEWS FROM OCLC

Compiled by Jay Weitz



### General News

#### **OCLC Trustees to Engage Members in Process to Select Next President and CEO**

The OCLC Board of Trustees will engage OCLC members in the process to select a successor to Jay Jordan, who plans to retire as OCLC President and CEO at the end of June 2012. Larry Alford, Chair, OCLC Board of Trustees, and Chief Librarian, University of Toronto Libraries, announced the composition of an Executive Search Committee from the OCLC Board that will lead the process to select a new leader of the cooperative. Committee members are:

- Chair, Sandy Yee, Dean of the Wayne State University Libraries and Library and Information Science Program.
- Ed Barry, President Emeritus, Oxford University Press.
- Maggie Farrell, Dean of Libraries, University of Wyoming.
- Bernadette Gray-Little, Chancellor, University of Kansas.
- Kathleen Imhoff, Library Consultant.
- David Lauer, Former President and COO, Bank One, NA.
- James Neal, Vice President for Information Services and University Librarian, Columbia University.
- Elisabeth Niggemann, Director General, Deutsche Nationalbibliothek.

The OCLC Board has hired Heidrick & Struggles, an executive search firm that operates from principal business centers in North America, Latin America, Europe, the Middle East, Africa, and Asia Pacific, to aid in the search process. The Executive Search Committee will develop and oversee a plan to ensure that perspectives from the OCLC Board, members, and staff are included in the search process. The committee will develop a timeline and a search plan in conjunction with the search firm to ensure broad national and international exposure for the position, as well as consideration of internal candidates. The committee will soon form a Community Advisory Group that will involve the OCLC membership, OCLC staff, and the library community at large in the process to select the next president. The Community Advisory Group will provide input on the position profile that might include key attributes, skills, and other considerations in a candidate. The group may offer specific referrals for consideration, and will work collaboratively with the Executive Search Committee to represent the interests of various stakeholders, including OCLC members and staff. A brief explanation of the process presented by Mr. Alford to OCLC staff is available on the Web (<http://mediasuite.multicastmedia.com/player.php?p=f365t48d>). The search process is expected to take up to a year. Mr. Jordan announced his plans to retire during the OCLC President's Luncheon at the ALA Annual Conference on June 27, 2011. He is the fourth president of OCLC. By June 2012, Mr. Jordan will have served 14 years as president and CEO, the longest tenure of any OCLC president.

## **OCLC to Offer Free Online Training for Members in the U.S. and Canada**

OCLC will offer free, live-online, and self-paced training for many courses that cover Cataloging, Resource Sharing, and FirstSearch services beginning July 1, 2011. Advances in e-learning technologies and the increased demand for online learning have allowed us to offer more training while affording greater economies of scale. This makes it possible to pass these savings on to OCLC members in the U.S. and Canada by offering free training on the services members rely on most. In April 2011, OCLC announced that prices for Cataloging, Resource Sharing, and Access would remain flat for the third consecutive year. Adding training at no additional cost further increases savings and the value of membership in the OCLC cooperative. We want all members to be able to take full advantage of OCLC training and learning opportunities. OCLC trainers and training partners—Amigos, WiLS, Minitex, MLNC, MCLS, OHIONET, and LYRASIS—will continue to offer a wide variety of classes and learning opportunities to help members refresh or maintain skills, ensure effective use of OCLC subscription services, and learn new applications to help members leverage their investments in the cooperative. To find out more about training OCLC offers, sign up for courses, and begin taking advantage of these new learning opportunities, please visit the OCLC Training Portal at <http://training.oclc.org/1>.

### **Cataloging and Metadata**

#### **OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2011**

OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2011 is currently scheduled for August 2011. This will include MARC 21 Update No. 12 (October 2010), MARC Code List changes since May 2010, Connexion user and OCLC staff suggestions, and several MARC elements that had been postponed until the April 2011 release of the Connexion client 2.30. Among those elements is the new Computer File 008/23 and 006/06 “Form of Item” (OCLC fixed field “Form”). Technical Bulletin 260 “OCLC-MARC Format Update 2011”

(<http://www.oclc.org/support/documentation/worldcat/tb/260/default.htm>) provides details.

#### **Expansion of National Level Enhance to NACO Participants**

During August 2011, in cooperation with the Program for Cooperative Cataloging (PCC), OCLC has expanded the capabilities of OCLC participants with NACO authorizations. Individuals with NACO authorizations, along with those with National Level CONSER and National Level Enhance authorizations, which already include NACO capabilities, are now able to edit and replace BIBCO records (non-serial records with 042 code “pcc”). Creation of new BIBCO records and authentication of existing non-BIBCO records (i.e., adding 042 code “pcc”) will continue to be restricted to those with National Level Enhance authorizations in their specified formats. OCLC is working with NACO participants to familiarize them with their new capabilities.

#### **OCLC Statement on the RDA Implementation Decision**

With the release of the “Response of the Library of Congress, the National Agricultural Library, and the National Library of Medicine to the RDA Test Coordinating Committee” ([http://www.nlm.nih.gov/tsd/cataloging/RDA\\_Executives\\_statement.pdf](http://www.nlm.nih.gov/tsd/cataloging/RDA_Executives_statement.pdf)), OCLC is beginning a process to determine how best to proceed in the integration of RDA practices into WorldCat. The current OCLC

policy statement on RDA cataloging, which has been in effect since the publication of RDA in June 2010, during the RDA national testing period of October through December 2010, and remains in effect, is located at <http://www.oclc.org/us/en/rda/policy.htm>. The policy statement has been updated to reflect the end of the formal RDA test period and the national library decision about implementation no earlier than January 2013. Later this year, OCLC intends to issue a discussion paper regarding the possible future of bibliographic records with mixed practices in WorldCat. The purpose of this paper will be to generate as wide a discussion as possible among members of the OCLC cooperative in order to work toward a consensus about the policies that will work best both for the cataloging community and for library users. Because the U.S. implementation date for RDA has been announced as no sooner than January 2013, there is ample time to consider thoughtfully what best practices might help to carry cooperative cataloging into the long term future. OCLC staff members will be participating in three task groups on RDA formed by the PCC (<http://www.loc.gov/catdir/pcc/>); the work of those task groups will also help to inform these most important discussions. In the meantime, while the process of preparing and discussing that paper is taking place, OCLC requests that libraries continue to abide by the policies outlined in the current policy statement. Please remember that duplicate records within WorldCat are not permitted and will be merged if found. In addition, please do not edit the master records to change them from RDA to AACR2 or from AACR2 to RDA unless permitted under the policies set forth.

## **Reference and Discovery**

### **New Agreement to Bring WorldCat Content to Credo General Reference Service**

OCLC and Credo Reference are pleased to announce they have signed an agreement to integrate the WorldCat Search API into the Credo General Reference service, their flagship content application. With this new agreement, OCLC member libraries that subscribe to the Credo General Reference service will be able to retrieve a list of books from WorldCat related to the topic of their Credo Reference search. Under this new partnership, authenticated users will be able to access the Credo General Reference service from the library or Credo Reference website and perform a search for encyclopedic entries. Each entry includes a side panel listing books that are related to the topic generated from a search of WorldCat using the library's key to the WorldCat Search API. Each book includes a link to the library's OPAC or discovery application to get additional information, such as shelf status. Credo Reference expects to release the functionality in July 2011. Libraries will be able to activate the functionality by registering their key to the WorldCat Search API within the application. Libraries that do not already have a key to the API can visit the OCLC website for more information on how to obtain a key.

### **More Databases and Collections from Around the World Added to WorldCat Local**

OCLC has signed agreements with leading publishers and other content providers from around the world to add more databases and collections to WorldCat Local, the OCLC discovery service that offers users integrated access to more than 800 million items in libraries worldwide. Libraries using WorldCat Local can offer users access to 1,400 databases and collections, and more than 500 million articles. OCLC recently signed agreements with publishers to make more content available through WorldCat Local, including:

- **Annual Reviews:** The U.S.-based Annual Reviews will add its highly cited critical review journals in disciplines within the Biomedical, Life, Physical & Social Sciences and Economics fields.



- ASABE: The American Society of Agricultural and Biological Engineers is an international scientific and educational organization furthering the advancement of engineering in agricultural, food, and biological systems. ASABE will make its publications available via its online Technical Library.
- Berkeley Electronic Press: ResearchNow, published by Berkeley Electronic Press, comprises peer-reviewed academic journals in Economics, Law, Statistics, Medicine and the Humanities.
- Gale: Gale is a leading U.S. educational publisher for libraries, schools and businesses. Seven additional databases will be added to those already accessible through WorldCat Local, including Business & Company Resource Center; Literature Criticism Online; Beacham's Guide to the Endangered Species of North America; Biography and Genealogy Master Index; Gale Virtual Reference Library; National Newspaper Index and Twayne's Authors Series.
- Genealogy Today: Genealogy Today is a U.S. publisher of genealogy data, family tree history and ancestry-related information services. The Genealogy Today database and Archive Catalog will be added to WorldCat Local.
- The Institution of Engineering and Technology: The British IET provides a range of leading publications and information services in the areas of engineering and technology. IET will add access to books, journals and the INSPEC database to WorldCat Local.
- Karger: The Swiss S. Karger AG is a renowned medical and scientific publishing house, making its large books and journals program available through WorldCat Local.
- M.E. Sharpe: M.E. Sharpe is a privately held U.S. publisher of books and journals in the social sciences and humanities, including titles in economics, political science, management, literature, and history. M.E. Sharpe is making Sharpe Online books and journals available.
- Modern Language Association: The MLA is an international membership organization dedicated to the study and teaching of language and literature. The MLA will be adding its highly regarded MLA International Bibliography to WorldCat Local, providing a subject index for books and articles published on modern languages, literatures, folklore and linguistics.
- National Institute of Justice: The National Institute of Justice is the research, development and evaluation agency of the U.S. Department of Justice. NIJ produces print and electronic publications, tools, and training materials about crime and justice. National Criminal Justice Reference Service Abstracts will be added to WorldCat Local.
- Oxford University Press: Oxford University Press is the world's largest university press and publishes in all academic fields, from multiple offices around the world. Five additional databases from the Oxford University Press will be accessible through WorldCat Local, including Oxford Music Online (including Grove Music), Oxford Art Online (including Grove Art), Oxford Reference Online, American Dictionary of National Biography, and Oxford Dictionary of National Biography.

WorldCat Local provides access to books, journals and databases from a variety of publishers and information providers from around the world; the digital collections of groups like HathiTrust, OAlster and Google Books; open access materials; and the collective resources of libraries worldwide through WorldCat. OCLC continues to negotiate access to critical library content on behalf of the cooperative to ensure access to libraries' most popular resources.

## **WorldCat Local Mobile Now in Production**

A production version of mobile-optimized WorldCat Local is now available to libraries following beta testing of the service that makes it possible for mobile users to discover items, see location, shelf status, call numbers, and more in their local library, and in libraries worldwide. New mobile-optimized WorldCat Local sites include many additional features not available in the beta version, most notably support for a wide range of devices. Any smart phone or feature phone capable of running JavaScript or a Java-based Web browser such as Opera Mini or Bolt will be supported worldwide. Libraries that maintain a full WorldCat Local subscription have the option to customize their mobile presence. In addition, the production version includes more item information than before, with easier navigation to previous and next items within a results set. Users can see location, shelf status, call number, levels of availability and can place a hold, request the item or email citations for any content that does not require authentication. The move into production creates the possibility of a mobile presence for more than 20,000 libraries. Any library with WorldCat Local or visibility on WorldCat.org can claim their unique URL and use it to support their mobile users. The new mobile-optimized WorldCat Local views are the result of more than two years of research, learning, and usability testing. Mobile-optimized WorldCat Local is available to WorldCat Local users at no additional charge. The enhancement represents an added value of OCLC membership, and is a benefit of members' investment in library cooperation. User feedback is encouraged for the new production mobile-optimized WorldCat Local sites. Mobile-optimized views of WorldCat.org will remain in beta at <http://www.worldcat.org/m>. OCLC worked with partner Boopsie.com on the original WorldCat Mobile pilot app, which helped to inform progress in development. The app will no longer be available as of June 30, 2011. Any user who has downloaded the pilot app will be prompted to visit [www.worldcat.org/m](http://www.worldcat.org/m).

## **Content from Brill Academic Publishers to be Available Through WorldCat Local**

A recent agreement between OCLC and Brill Academic Publishers will make Brill's reference, book, and journal content available to library users through WorldCat Local, the OCLC discovery-to-delivery service that offers users integrated access to electronic, digital, and physical library materials. Full text of content from Brill Academic Publishers will be available for search through WorldCat.org and the Touchpoint discovery service in addition to WorldCat Local. WorldCat Local authenticated users will also be able to search Brill's abstract and index databases, including Index Islamicus, which has been the leading bibliography on Islam and the Muslim world for almost 100 years. Brill Academic Publishers is an independent academic publishing house with a rich history and strong international focus, specializing in the humanities and life sciences. Main subject areas include History, Islam/Oriental Studies, and Religion, as well as specialist scientific fields. In addition to Brill's book and journal content, the following publications from Brill Academic Publishers will be added to the WorldCat Local central index: Brill Online, Index Islamicus, Religion Past and Present Online, Africa Yearbook, Brill Dictionary of Religion, Dictionary of Gnosis and Western Esotericism, Encyclopedia of Islam Online, Encyclopedia of Judaism Online, Encyclopedia of Qu'ran Online, Encyclopedia of Women & Islamic Cultures Online, Jacoby Online, New Pauly Online, World Christian Database, Encyclopedia of Arabic Language and Linguistics, Brockelmann Online, Linguistic Bibliography Online, Index to the Study of Religion Online, Brill's Encyclopedia of Religion Online, Brill's Encyclopedia of China Online, Collected Courses of the

Hague Academy Online. Headquartered in Leiden, the Netherlands, the company also has an office in the United States and a representative office in Japan. Publications are predominantly in English and largely comprise monographs or books in series, encyclopedias, and some eighty periodicals. OCLC will index metadata for primary sources, reference works, books, and journals from Brill.

### **EasyBib Library Edition Moves into Production**

As EasyBib Library Edition finishes a successful beta and trial period, it now makes the transition into a production-ready service. EasyBib Library Edition builds on the popular citation management service EasyBib.com and adds features such as library branding, links to the library catalog, locations, hours, and more. The six institutions that participated in the EasyBib Library Edition beta saw increased usage from their students—anywhere from 65 to 100 percent more. Following the beta period, more than 40 libraries also participated in a month-long trial of the service during the month of April 2011. From the student point of view, EasyBib Library Edition makes life much easier. It provides intuitive, easy-to-use tools to cite and evaluate sources. There are links to the library's collections, virtual reference services, and information such as hours and location. And it removes advertising from the site. From the librarian's point of view, EasyBib Library Edition is a good fit for undergraduates and students who need a simple solution for the average research assignment. EasyBib Library Edition offers visibility online for libraries where their students are already going, with no work required on the library's part. Since more than 26 million students are already using the free version of EasyBib.com, training or library-led instruction can focus on teaching content instead of the tools themselves. Libraries who have implemented WorldCat Local, WorldCat Local “quick start,” or have visibility on WorldCat.org will find additional value for their subscriptions when they turn on EasyBib Library Edition. It uses the same settings and branding information already stored in OCLC Service Configuration, so sites can be fully functional in 24-48 hours. WorldCat.org and WorldCat Local also feature the ability to export citations to EasyBib.com and EasyBib Library Edition. You may qualify for an additional discount based on your Web-Scale Management Services or WorldCat Local subscriptions or your affiliation with a group, consortium, or OCLC U.S. service partner that has chosen to work with OCLC on a limited time promotion around EasyBib Library Edition. 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 and learn more about the service at <http://www.oclc.org/us/en/easybib/default.htm>. To learn more about how your group or consortium can participate in the EasyBib Library Edition promotion or become an OCLC U.S. service partner, please contact [partnerships@oclc.org](mailto:partnerships@oclc.org).

### **Resource Sharing and Delivery**

#### **New Document-Sharing Site for Resource Sharing**

OCLC has developed a document-sharing site that provides a single, secure location where lending libraries can place requested PDF and TIFF articles and library users can retrieve articles or book chapters obtained for them via interlibrary loan. Use of the site integrates easily with interlibrary workflows of libraries that use WorldCat Resource Sharing, ILLiad, WorldCat Navigator, or other resource sharing services. This site adds convenience, security and enhanced copyright compliance to article sharing through interlibrary loan. Benefits of this site include:

- Eliminates file size and security issues often encountered when documents are transmitted through email. PDF and TIFF files of any size – including high resolution PDF documents – can be placed on the site for pick-up by library users.
- Automatic deletion of files supports compliance with copyright guidelines. Viewed files are deleted after 3 views or within 5 days of being accessed and unviewed files are deleted after 30 days.
- Minimal local technical support is required because the Web site requires no software download or special arrangements for access through a local firewall.
- The platform-independent site can be accessed from PCs, MACs or any operating system.

Once a file has been retrieved, it remains available for 5 days. After 5 days, the file will be removed. A file can be picked up a maximum of three times for each URL/password combination. Files not retrieved remain available for 30 days.

### **Management Services and Systems**

#### **New Search Options Added to WorldCat Local**

New search options in the WorldCat Local service give users more access to local library data and additional ways to refine search results.

- **Limit to peer-reviewed content:** A peer-reviewed limiter has been added to the service in response to user requests. The new limiter lets users refine searches and search results to peer-reviewed articles, e-articles, journals, and e-journals in databases accessible through the WorldCat Local central index with the exception of WorldCat. The limiter will be added to WorldCat as a future enhancement. Users can limit to peer-reviewed using the new Popular Limits section of the Advanced search screen or they can refine search results by the peer-reviewed facet under the Article format and under Content on the WorldCat Local interface. An item's peer-reviewed status is determined through the xISSN service, an OCLC API which harvests data including peer-reviewed status from approximately 60 sources.
- **Search of local bibliographic data:** Local data such as local subject headings, uniform titles, and notes is now searchable in WorldCat Local. Since February, 2011, WorldCat Local libraries have been able to add their local data to the service through OCLC Batchload, and this rich locally-created content began to display in the interface in May. This additional data complements the full bibliographic data from the WorldCat database already available in the service and gives users more access points to their libraries' resources. When a library adds its local data to a WorldCat Local site, it is available only to users of that site, and will not display to other WorldCat Local library sites. Details about providing access to local bibliographic data through WorldCat Local are provided in "Quick Reference: Local Bibliographic Data for WorldCat Local" ([http://www.oclc.org/us/en/support/documentation/worldcatlocal/WCL\\_local\\_bib.pdf](http://www.oclc.org/us/en/support/documentation/worldcatlocal/WCL_local_bib.pdf)).

#### **EZproxy 5.4.1 Now Available**

The library community's leading authentication and access solution has been enhanced again. A number of issues have been reported and resolved with the EZproxy 5.4.1 release, available now. Fixes with EZproxy 5.4.1 include the following:

- The restart function now correctly restarts EZproxy on Windows platforms.

- The IPC file (named ezproxy.ipc) is now being created on Windows platforms. This resolves the possibility of multiple instances of EZproxy being started on a server out of the same directory.
- Shibboleth with groups is now completing authentication instead of being presented with logup.htm.
- Fixed: The limit on number of include File entries was inadvertently set much smaller in V5.4. The limits set in V5.4.1 are 4096 include files allowed at a depth of up to 64 nested includes - include files with another include statement.
- Changed: If EZproxy is restarted and an IPC file exists, EZproxy will now issue a message suggesting you can delete this file if you know EZproxy isn't currently running. Before this change, EZproxy would not start or issue a related message.

Issues anticipated to be fixed in EZproxy 5.5 release later this year:

- The string concatenation operator is interpreted as a character belonging to the neighboring textual constant rather than as a concatenation operator. If you see this problem, the workaround is to insert a space around the operator.
- When users authenticate using Shibboleth 1.3, each authentication results in the message: "SAMLResponse no encrypted Assertion elements" being written to the messages.txt file. This message can be ignored and will be removed.
- EZproxy does not work Shibboleth IdP version 2.3 (on any of our supported Operating Systems). We understand what the issue is and are implementing a change to resolve this issue.

Other notes:

- Some sites are reporting Shibboleth authentication was not working with EZproxy V5.3 on the Solaris operating system. We have verified the Solaris version of EZproxy V5.4.1 works with our test IdP. Please note the issue about Shibboleth IdP V2.3 above applies to the Solaris version of EZproxy too.
- Message "SAML received assertion without a status of success, denying access" logged with a failure to authenticate with Shibboleth. This issue has existed since V5.1d and has been reported with institutions in the UK Access federation. OCLC is currently researching this issue and will either issue an update to EZproxy or describe a configuration method to resolve this problem shortly.

We encourage you to upgrade to EZproxy 5.4 .1 to stay current with the latest features. Please review the enhancements page and upgrade

(<http://www.oclc.org/support/documentation/ezproxy/download/>) at your earliest convenience.

## **OCLC Research**

### **Seeking Synchronicity: Revelations and Recommendations for Virtual Reference**

A ground-breaking membership report from OCLC Research suggests that by transforming virtual reference (VR) service encounters into relationship-building opportunities, librarians can better leverage the positive feelings people have for libraries. This is critically important in a crowded online space where the biggest players often don't have the unique experience and specific strengths offered by librarians. The report—*Seeking Synchronicity: Revelations and Recommendations for Virtual Reference*—demonstrates that today's students, scholars and citizens are not just looking to libraries for

answers to specific questions—they want partners and guides in a lifelong information-seeking journey. *Seeking Synchronicity: Revelations and Recommendations for Virtual Reference*, from OCLC Research, in partnership with Rutgers, the State University of New Jersey, and additionally funded by the Institute of Museum and Library Services (IMLS), distills more than five years of VR research into a readable summary featuring memorable quotes that vividly illustrate very specific and actionable suggestions. Taken from a multiphase research project that included focus group interviews, online surveys, transcript analysis and phone interviews, with VR librarians, users and non-users, these findings are meant to help practitioners develop and sustain VR services and systems. The report asserts that the “R” in “VR” needs to emphasize virtual “Relationships” as well as “Reference.” Among the topics addressed are:

- How convenience is the “hook” that draws users into VR services
- The exaggerated death of ready reference
- The importance of query clarification in VR
- Ways to boost accuracy and build better interpersonal relationships in VR
- What can be learned from VR transcripts
- Generational differences in how people perceive reference interactions and determine success
- The need for more and better marketing of a suite of services – a “multi-tasking” approach

The report's two primary authors, Lynn Silipigni Connaway, Ph.D., OCLC Senior Research Scientist, and Marie L. Radford, Ph.D., Associate Professor, School of Communication & Information, Rutgers, the State University of New Jersey, said that the goal of their work together, which began in 2005, has been to deliver research-based recommendations that improve the VR services provided by information professionals. View and download the report from the Seeking Synchronicity report page at <http://www.oclc.org/us/en/reports/synchronicity/>.

### **New Publication: OCLC Research Launches Quarterly Highlights**

The *OCLC Research Quarterly Highlights* gathers items from the previous quarter of work in OCLC Research, the OCLC Innovation Lab, and the OCLC Research Library Partnership. The new Quarterly Highlights (<http://www.oclc.org/research/publications/newsletters/quarterlyhighlights/default.htm>) provides an overview of recent activity, as well as an occasional look ahead. The hope is that this snapshot will conveniently capture things you might have missed in the ongoing flow of the quarter itself. OCLC Research has an active agenda of work on behalf of, and in collaboration with, libraries and archives. The goal of the Quarterly Highlights is to give you a quick update and overview of these activities, in a way that respects your time and interests.

### **New Prototype: WorldCat Identities Network**

The WorldCat Identities Network gives users the opportunity to visually explore the interconnectivity and relationships between WorldCat Identities. The WorldCat Identities Network uses the WorldCat Identities Web Service and the WorldCat Search API to create an interactive Related Identity Network Map for each Identity in the WorldCat Identities database. The Identity Maps can be used to explore the interconnectivity between WorldCat Identities. WorldCat Identities creates a summary page for every name in WorldCat, including people, things (e.g., the Titanic), fictitious characters (e.g., Harry Potter), and corporations (e.g., IBM). This application was developed primarily by JD Shipengrover, Senior Web

& User Interface Designer, and Senior Software Engineer Jeremy Browning. The prototype is available from the WorldCat Identities Network activity page (<http://www.oclc.org/research/activities/idnetwork/default.htm>).

### **OCLC Research and Research Libraries UK to Survey Research Libraries**

OCLC Research and Research Libraries UK are working together on a project to gather data on special collections in research libraries in the UK and Ireland. The project is similar to a project conducted by OCLC Research in 2009 that gathered data on special collections in the United States and Canada. The distinction that special collections bring to research institutions has become widely recognized, and an aggregated profile of collections, access policies, users, adoption of new technologies, and other important topics will establish norms across the UK special collections community. The data will effectively support decision-making for strategic priorities and collaborative projects. Individual libraries will be able to place themselves in the context of community norms and consider taking appropriate actions in response. The survey population will include all Research Libraries UK (RLUK) members, as well as OCLC Research Library Partnership institutions in the UK and Ireland. The project fits comfortably into RLUK's current strategic priorities, which include a strand, Unique and Distinctive Collections, which focuses on maximizing the potential of special collections. It also extends the impact of OCLC Research's 2009 work by facilitating comparison of responses in North America and the UK. By working together, these two organizations bring a larger reach and expertise to this project due to their confluence of mutuality and strong working relationships. The OCLC Research and RLUK project team expects to retain most questions from the 2009 survey to enable comparisons across the two projects. The questions will be adapted or enhanced as appropriate to reflect practices and priorities of the RLUK community. A committee of experts selected by the RLUK board of directors will work with OCLC Research staff to adapt the survey to the RLUK landscape. A report detailing the results of the survey will be published in the second quarter of 2012.

### **New Report on Convenience in Information-Seeking Behaviors**

Lynn Silipigni Connaway, Timothy J. Dickey, and Marie L. Radford explore empirical evidence for convenience as a critical factor in information seeking, using data from two IMLS-funded user studies in "If It Is Too Inconvenient, I'm Not Going After It: Convenience as a Critical Factor in Information-seeking Behaviors." In today's fast-paced world, anecdotal evidence suggests that information tends to inundate people, and users of information systems want to find information quickly and conveniently. Empirical evidence for convenience as a critical factor is explored in the data from two multi-year, user studies projects funded by the Institute of Museum and Library Services. The theoretical framework for this understanding is founded in the concepts of bounded rationality and rational choice theory, with Savolainen's (2006) concept of time as a context in information seeking, as well as gratification theory, informing the emphasis on the seekers' time horizons. Convenience is a situational criterion in people's choices and actions during all stages of the information-seeking process. The concept of convenience can include their choice of an information source, their satisfaction with the source and its ease of use, and their time horizon in information seeking. The centrality of convenience is especially prevalent among the younger subjects ("millennials") in both studies, but also holds across all demographic categories—age, gender, academic role, or user or non-user of virtual reference services. These two

studies further indicate that convenience is a factor for making choices in a variety of situations, including both academic information seeking and everyday-life information seeking, although it plays different roles in different situations. For information, see <http://www.oclc.org/research/news/2011-06-06.htm>.



## OCLC QC TIP OF THE MONTH

**Submitted by Luanne Goodson**  
Consulting Database Specialist  
OCLC Quality Control Section

### **Recording available: Genre/Form Headings webinar**

You are invited to view the recording of the webinar held on May 12, 2011 entitled: Genre/Form Headings. This webinar covers the definition of genre/form headings, different sources of genre/form terms, searching in Connexion (authority and bibliographic), and tagging/coding. It is freely available, and you may view it at whatever time is convenient for you. Access it here:

<http://www.oclc.org/us/en/connexion/overview/websessions.htm>

About the presenter: Linda Gabel has worked at OCLC since 1984 in a variety of areas and is currently in WorldCat Quality Management. Among her past responsibilities and projects are OCLC Contract Cataloging, Connexion product management, Format Integration-- Phase 2, the development of the CatExpress service, and the introduction of the eSerials Holdings service. She has a masters in library science from the University of Pittsburgh. Linda has served on several ALA committees, primarily for ALCTS, including the subcommittee which produced the second edition of "Guidelines on Subject Access to Individual Works of Fiction, Drama, Etc." (better known as GSAFD).

Genre headings are being used more frequently by libraries in bibliographic records to indicate the type of material that is being described in a record. In June 2010, the Library of Congress' Policy and Standards Division (PSD) determined that the new thesaurus, Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT), should be formally separated from Library of Congress Subject Headings (LCSH). In order to accomplish this, about 1600 records (deletes plus reissues) were sent to OCLC as part of the May 24, 2011, Volume 26, Issue 21 distribution of subject authorities via the MARC Distribution Service (MDS).

Authority records for LCGFT terms are coded as follows:

LCCN prefix: gf

OCLC Fixed Field: Subj [008/11]: z ("Other")

040\$f: lcgft

Example:

008/11 z

010 gf2011026697 #z sh2009025020

040 DLC #b eng #c DLC #f lcgft

155 Topographic maps

455 Hypsographic maps

455 Hypsometric maps

455 Relief maps

455 Topographical maps

555 Maps #w g

[Note that the deleted LCCN is being retained in field 010 \$z, to facilitate automatic updates.]

As of May 24, 2011, new coding should be used when assigning LCGFT terms in bibliographic records. That coding is as follows:

655 #7 \$a [Term]. \$2 lcgft

Example:

Title: Survivor: Thailand.

655 #7 \$a Survival television programs. \$2 lcgft

655 #7 \$a Nonfiction television programs. \$2 lcgft

You can read information about genre/form headings at LC here:

<http://www.loc.gov/catdir/cpsoc/genreformgeneral.html>

If you have questions, please send email to: [askqc@oclc.org](mailto:askqc@oclc.org)

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## Locked Bibliographic Records in WorldCat

To everyone's benefit, increasing numbers of catalogers are participating in the Expert Community in support of cooperative database quality efforts. In addition, participation in the previously existing quality programs (CONSER, BIBCO, Enhance, minimal-level upgrades, and database enrichment) continues at a high rate. An unfortunate side effect of the increase in cooperative efforts is an increased potential for interrupting other users' workflows if you keep a record locked in the Cataloging Save File for a long period of time. Since only one institution at a time can lock a record, OCLC staff members regularly receive queries from users who can't lock or replace a record because another user has locked it.

Completing your replace transactions quickly has numerous positive results. First, other users will have access to your improved record right away, thus avoiding unnecessary duplication of effort. Second, other users who wish to lock and replace the same record will be able to do so without repetitive attempts and inconvenience. Third, OCLC automated database quality software can work more effectively (for example, locked records cannot be processed by Duplicate Detection and Resolution (DDR)).

Therefore, OCLC staff request that you complete your replace transactions as expeditiously as possible. When you save a locked master record, the system places a long-term (14-day) lock on the master record in WorldCat. Other users can retrieve a copy, but cannot change the master record. Records can be saved in an online or local save file to be worked on later without locks being used. In cases in which records have been locked longer than two weeks, you may contact OCLC staff at [bibchange@oclc.org](mailto:bibchange@oclc.org) and notify us that you need the record unlocked.

However, records do not need to be locked in Connexion Client for editing and replace to occur. After editing, to replace a master record, on the Action menu, click Replace Record or Replace and Update Holdings. Note: If you did not lock the record before editing, the system locks it automatically before carrying out the Replace Record or Replace and Update Holdings action. If another user locked or replaced the record after you opened or saved it, the action fails and you get an error message. To cancel replacing the record, click No. If you cancel, the system redisplay the record for further editing. For more information see Connexion Client documentation:

<http://www.oclc.org/support/documentation/connexion/client/cataloging/bibactions/>

If you have questions, please send email to: [askqc@oclc.org](mailto:askqc@oclc.org)

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### **Provider-Neutral ebook cataloging policy - additional formats coming**

The provider-neutral cataloging policy, originally implemented on August 1, 2009 by the Program for Cooperative Cataloging, changed the cataloging of eBook resources resulting in fewer bibliographic records.

Provider-neutral records are the same as Aggregator-neutral records. They are bibliographic records which contain information common to all equivalent manifestations of an eBook. Information specific to any one provider is generally omitted except for the 856 field.

Provider-neutral records are base records available in the shared cataloging environment of WorldCat to which libraries can add information locally as needed. OCLC staff have been working to neutralize existing eBook records. Some examples of records which are provider-neutral and where Duplicate Detection and Resolution has merged the other versions are: #71425188, #191943299, #228168934, #568747838.

Catalogers are encouraged to create only one record to represent equivalent manifestations of an eBook. Duplicates can be reported to OCLC Quality Control by sending email to [bibchange@oclc.org](mailto:bibchange@oclc.org) or while viewing a bibliographic record in Connexion go to the Action menu and choose Report Error. This opens a window with an area for free-text, and upon sending includes a copy of the record as it appeared at the time the window was opened.

Please see: <http://www.oclc.org/worldcat/catalog/quality/expert/websessions.htm> for a recording of a Provider-Neutral Webinar, as well as a PowerPoint presentation. Also, the Provider-neutral e-monograph MARC record guide (including June 2011 revisions) can be accessed here: [http://www.loc.gov/catdir/pcc/pn\\_guideDraftRev20110621rev.pdf](http://www.loc.gov/catdir/pcc/pn_guideDraftRev20110621rev.pdf)

This policy currently applies only to eBooks, and not to other monographic formats such as eAudio, streaming video, etc. The eBooks may be issued as born-digital resources, current simultaneously-issued-with-print editions, or scanned reproductions of previous existing materials. Create a provider-neutral record for eBooks even if no equivalent manifestations exist at the point of cataloging.

Provider-Neutral guidelines for formats others than textual are in the works and are expected to be announced in the coming months.

If you have questions, please send email to: [askqc@oclc.org](mailto:askqc@oclc.org)

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If you have forgotten your Username or password please contact:

Teressa Keenan

Teressa.keenan@umontana.edu

OLAC Web Page & OLAC-L Administrator

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