

2012

OLAC NEWSLETTER



Balloon and Mountain  
Photo courtesy: Kim Ashley

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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, [jay\\_weitz@oclc.org](mailto:jay_weitz@oclc.org). 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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## FROM THE PRESIDENT

**Amy Weiss**



I'd like to encourage everyone to attend our Biennial Conference, held this year in beautiful Albuquerque, New Mexico. Attending this conference will improve and expand your cataloging skill base as many of the workshops will focus on RDA and metadata. Nowhere else will you find such a range of topics related to non-book materials and receive so much valuable information. If you can't come, be sure and direct your colleagues to our conference website at <http://olac2012.weebly.com/olac.html>. There is truly something for everyone at this conference.

Our workshops will cover sound recordings, eSerials, and video recordings in context of RDA. Branch out by attending a workshop on FRBR applications for film and video, or a metadata workshop focusing on XML. Respect authority! We will have an RDA name headings workshop. Our keynotes, Eric Childress and Lynne Howarth, will help us look at this exciting moment in our profession.

Plus, take some time to enjoy beautiful Albuquerque. Come early for the balloon fiesta or extend your stay and hike the Sandia Mountains in their autumn splendor.

This is my last column as President of OLAC. Truly, the last two years have been the best of times and the worst of times for cataloging. The worst in that the future has at times seemed so uncertain, the best in that the changes which are in store for us open up so many new possibilities. I hope you will continue to support OLAC (I know I will!) while we navigate the changes ahead.

## FROM THE EDITOR

**Marcy Strong**



As summer approaches and the heat starts to build, that can only mean one thing: it's nearly time for ALA! This year, the conference will be held in Anaheim and this issue contains a lengthy list of meetings that might be of interest to OLAC members. There will be several meetings on RDA and RDA implementation, and also some sessions on the future of MARC. Don't forget about OLAC while in Anaheim; we hope to see you at the CAPC meeting on Friday and/or the OLAC Membership meeting on Sunday.

The conference news continues with the announcement that registration is now open for the 2012 OLAC Conference in Albuquerque this October. Amy mentioned several of the sessions in her President's column and Rebecca shares more details in the "OLAC Conference Preview." Please see "News and Announcements" for a wonderful opportunity to apply for the OLAC Conference Scholarship!

In this issue you'll also find the results from the recent OLAC election, the MOUG/OLAC Conference Report, news and announcements, a book review and OLAC Cataloger's Judgment.

The OLAC Executive board will be transitioning soon and I would like to thank Amy Weiss and Marcia Barrett for their contributions to this newsletter and the organization.

Have a wonderful summer and I hope to see you in Anaheim!

**TREASURER'S REPORT**  
**3rd Quarter FY12**  
**January 1 – March 31, 2012**



**Bruce J. Evans**

	3rd quarter	FY-to-Date
<b>Opening Balance</b>	12,324.47	\$ 12,324.47
<b>Income</b>		
Memberships	\$ 2,782.38	\$ 5,072.25
Other Inc.		\$ 0.17
<b>Total</b>	<b>\$ 2,782.38</b>	<b>\$ 5,072.42</b>
<b>Expenses</b>		
Board dinner		\$ 431.76
Newsletter production		\$ 100.00
ALA Affiliate Membership Renewal	\$ 150.00	
ALA Stipend	\$ 500.00	\$ 1,100.00
ALA Room Fee (2 @ \$60 each)	\$ 120.00	\$ 120.00
Website administration		\$ 200.00
Katie Eller (OLAC Book Rev.) reimb.		\$ 26.49
Supplies		\$ 20.00
Check supplies		\$ 13.97
Bank Charge	\$ 15.00	\$ 40.00
OLAC Conference		\$ 100.00
PayPal Fee	\$ 48.58	\$ 107.07
Postage		\$ 8.80
OLAC 2010 speaker reimbursement		\$ 670.00
<b>Total Expenses</b>	<b><u>\$ 833.58</u></b>	<b><u>\$ 2,938.09</u></b>
<b>Closing Balance</b>		<b>\$ 14,273.27</b>
Personal Membership	200	
Institutional Membership	<u>7</u>	
<b>Total</b>	<b>207</b>	As of March 31, 2012

## OLAC CONFERENCE PREVIEW

**Rebecca Lubas**  
Conference Chair  
University of New Mexico



The OLAC 2012 Conference countdown has begun! We have our full workshop roster available at <http://olac2012.weebly.com/workshops.html> , including our concurrent and preconference workshops. Remember that for your registration fee you get keynotes, breakfasts, a business lunch, and four concurrent workshops.

Registration is now open! Please register for the conference ASAP for best consideration for your workshop choices. You will rank the eight concurrent workshops. Full conference registration gets you four workshops, one day registration will get you two. We will be assigning workshops on **September 15** and the time which you registered will count (just like flying Southwest airlines). Although we accept registration after that date, workshop availability will be affected.

The OLAC member rate is \$199, one day registration is \$99. Hotel registration is open at the downtown Albuquerque Hyatt for the conference rate of \$100/night via [https://resweb.passkey.com/Resweb.do?mode=welcome\\_ei\\_new&eventID=5812552](https://resweb.passkey.com/Resweb.do?mode=welcome_ei_new&eventID=5812552)

Reserve now if you plan to come early for the Albuquerque International Balloon Fiesta for best rates! Plan to come early for the Fiesta...or stay later to enjoy enchanting New Mexico in the autumn. You can browse our tourism site at <http://www.newmexico.org/> or please feel free to ask a resident of New Mexico such as myself for suggestions and advice!

## CONFERENCE REPORTS

**MOUG/OLAC Liaison Report**  
**OLAC Annual Membership Meeting**  
**Dallas, TX**  
**22 January 2012**

### **Introduction**

The Music OCLC Users Group (MOUG) was established with the mission “to identify and provide an official means of communication and assistance for those users of the products and services of the Online Computer Library Center, Inc. (OCLC) concerned with music materials in any area of library service, in pursuit of quality music coverage in these products and services.” The group’s website is located at <http://www.musicoclcusers.org>.

Membership in MOUG is open to all individuals and institutions interested in MOUG’s objectives. An application form can be found at <http://www.musicoclcusers.org/mougmembership.html>. Reference and public service music users are particularly encouraged to join MOUG. MOUG members receive the *MOUG Newsletter*, valuable not only for organizational and OCLC news, but also for Jay Weitz’s “Questions and Answers” column.

MOUG meetings are often held in conjunction with the annual meetings of the Music Library Association (MLA). MOUG is particularly interested in reaching non-music-specialists and ‘occasional’ music users of OCLC. The group is not just for catalogers—there is a very active public services component as well.

### **News from MOUG**

Work on the 501(c)(3) application is finally drawing to a close. Attaining this status will allow MOUG to accept tax-deductible donations and make it eligible to receive certain discounted business-related services.

MOUG has also established a travel grant, the A. Ralph Papakhian Travel Grant, to honor the memory of Ralph. Travel grants are offered towards the annual meeting. Applications have closed for this year’s meeting, but watch the MOUG website for applications for 2013.

### **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, February, 14-15, 2012. As always, there is a great program lined up:



- OCLC and Non-MARC Metadata
- FRBR/FRAD: A Conversation
- Lightning Talks session “What is this? And how am I going to describe it?”

A more detailed schedule is available at the MOUG website (<http://www.musicoclcusers.org/mougmeet.html>). Registration is offered online through the Music Library Association. Additional information about the Music Library Association meeting can be found at <http://mla2012.musiclibraryassoc.org/home> (be sure to view the video!)

Mary Huisman  
MOUG/OLAC Liaison

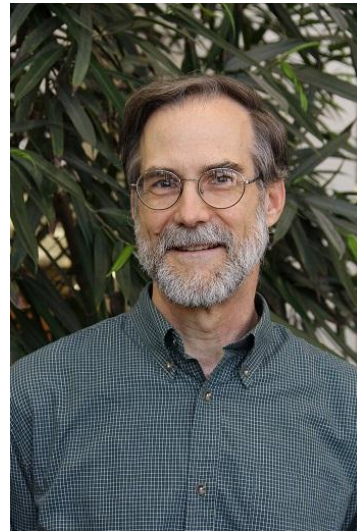
## 2012 OLAC ELECTION RESULTS

Pat Loghry  
OLAC Elections Chair

**Liz Miller**, Cataloging Librarian at the New Mexico State University Library, is the new OLAC Vice President/President Elect. **Scott M. Dutkiewicz**, Cataloger for the Monographs and Special Formats Section at Clemson University Library, is the OLAC Secretary. Liz and Scott will assume their offices at the end of the OLAC Membership Meeting at the ALA Annual Conference in Anaheim, California. Congratulations to them both! I want to thank all of the candidates (Scott Dutkiewicz, Liz Miller, and Heather Pretty) who participated in the elections.



**Liz Miller**



**Scott M. Dutkiewicz**

**MEETINGS OF INTEREST TO OLAC MEMBERS  
ALA ANNUAL, ANAHEIM, 2012**

**Friday, June 22nd**

A Change in Authority: Authority Work in the RDA Environment (Preconference)

8:00am-4:00pm

Anaheim Convention Center 207D

Creating Library Linked Data: What Catalogers and Coders Can Build (Preconference)

8:30am-4:00pm

Anaheim Convention Center 203B

Descriptive Cataloging of Rare Materials (C) Editorial Group Meeting (ACRL RBMS)

8:00am-4:00pm

Disneyland Hotel Frontier Board Room

Technical Services Directors of Large Research Libraries Interest Group

9:30am-12:30pm

Hyatt Regency Orange County Grand Ballroom A

Functional Requirements for Bibliographic Records (FRBR) Interest Group

10:30am-12:00pm

Anaheim Convention Center 202A

OCLC — Enhance Sharing Session

10:30am-12:00pm

Anaheim Marriott Gold Key I & II

CaMMS Forum

1:30-3:30pm

Anaheim Convention Center 209B

Controlled Vocabularies Subcommittee of the Bibliographic Standards Committee Meeting I (ACRL RBMS)

1:30-4:00pm

Disneyland Hotel Columbia

Competencies and Education for a Career in Cataloging Interest Group

2:30-4:00pm

Anaheim Convention Center 202A

PCC Program Training  
2:30-4:00pm  
Anaheim Convention Center 203A

SAC RDA Subcommittee (ALCTS CAMMS)  
7:30-8:30pm  
Hyatt Regency Orange County Grand Ballroom C

**CAPC Meeting (OLAC)**

**7:30-9:30pm**

**Hilton Anaheim San Simeon**

Cataloging and Metadata Management Section Executive Committee I (ALCTS CAMMS)  
7:30-9:30pm  
Hyatt Regency Orange County Grand Ballroom B

Controlled Vocabularies Subcommittee of the Bibliographic Standards Committee Meeting II (ACRL RBMS)  
7:45-9:15pm  
Disneyland Hotel Columbia

**Saturday, June 23rd**

OCLC — Dewey Update Breakfast and ALCTS Public Libraries Technical Services Interest Group  
7:00-10:00am  
Sheraton Park Hotel Plaza AB

Cataloging Issues Discussion Group  
8:00-10:00am  
Disneyland Hotel Monorail A

Copy Cataloging Interest Group  
8:00-10:00am  
Hyatt Regency Orange County Grand Ballroom E

RDA Update Forum  
8:00-10:00am  
Anaheim Convention Center 304AB

SAC Subcommittee on Genre / Form on LCGFT Literature Terms (ALCTS)  
8:00-10:00am  
Hyatt Regency Orange County Madrid

Technical Services Managers in Academic Libraries Interest Group

8:00-10:00am

Hyatt Regency Orange County Garden 4

Bibliographic Standards Committee Meeting (ACRL RBMS)

8:00am-12:00pm

Disneyland Hotel Disneyland Grand Ballroom South

Linked Data & Next Generation Catalogs

8:00am-12:00pm

Anaheim Convention Center 207D

Cataloging in Publication Advisory Group (CAG) Update

10:30am-12:00pm

Hilton Anaheim Redondo

Cataloging Norms Interest Group

10:30am-12:00pm

Hyatt Regency Orange County Royal Ballroom E

Getting to Know Alma: A Demonstration of the Ex Libris Unified Resource Management System

10:30am-12:00pm

Hilton Anaheim San Simeon B

MARBI I (ALCTS / LITA / RUSA)

10:30am-12:00pm

Hyatt Regency Orange County Royal Ballroom A

National Libraries RDA Forum

10:30am-12:00pm

Anaheim Marriott Elite Ballrooms

Role of the Professional Librarian in Technical Services Interest Group

10:30am-12:00pm

Hyatt Regency Orange County Pacific Room

Catalog Management Interest Group

1:30-3:30pm

Hyatt Regency Orange County Royal Ballroom E

Recruiting and Mentoring (ALCTS CAMMS)

1:30-3:30pm

Hyatt Regency Orange County Barcelona

Transformation: Revenge of a “Fallen” Code. Morphing our current MARC reality into a new RDA-enabled future

1:30-3:30pm

Anaheim Convention Center 213AB

Transforming Technical Services: Growing IT Skill Sets Within Technical Services Departments

1:30-3:30pm

Anaheim Convention Center Ballroom B

Committee on Cataloging: Description and Access I (ALCTS CAMMS)

1:30-5:30pm

Hyatt Regency Orange County Grand Ballroom A

SAC Subcommittee on Genre/Form Implementation (ALCTS CAMMS)

1:30-5:30pm

Hyatt Regency Orange County Granada

ALCTS Affiliates Showcase

4:00-5:30pm

Anaheim Convention Center 207A

Catalog Form and Function Interest Group

4:00-5:30pm

Hyatt Regency Orange County Grand Ballroom E

Catalog Use Committee Discussion Forum

4:00-5:30pm

Anaheim Convention Center 205B

Continuing Education (ALCTS CAMMS)

4:00-5:30pm

Hyatt Regency Orange County Barcelona

Electronic Resources Management Interest Group

4:00-5:30pm

Anaheim Convention Center 201A

Faceted Subject Access Interest Group

4:00-5:30pm

Hyatt Regency Orange County Imperial

Holdings Information Forum: Quality Standards in Batch Records and Adventures in Cooperative Cataloging: Many Hands Make Light Work

4:00-5:30pm

Hyatt Regency Orange County Grand Ballroom B

Intellectual Access to Preservation Metadata Interest Group

4:00-5:30pm

Hyatt Regency Orange County Pacific Room

Numeric and Geospatial Data Services in Academic Libraries Interest Group

4:00-5:30pm

Disneyland Hotel Disneyland Grand Ballroom North

OCLC — Better Together: How Cooperative Management Integrates ALL of Your Collections — Licensed,  
Print and Digital

4:00-5:30pm

Anaheim Convention Center 201D

Research and Publications (CAMMS)

4:00-5:30pm

Hyatt Regency Orange County Madrid

Standards Interest Group

4:00-5:30pm

Anaheim Convention Center 209A

MARC Formats Interest Group

4:00-6:00pm

Anaheim Convention Center 208B

### **Sunday, June 24th**

OCLC Update Breakfast

7:30-8:30am

Anaheim Marriott Grand Salon E & F

Current Research on and Use of FRBR in Libraries

8:00-10:00am

Program Anaheim Convention Center 213AB

Metadata Interest Group

8:00-10:00am

Hyatt Regency Orange County Grand Ballroom E

The AIR We Breathe. Borrowing Lessons From RDA Development To Train For Your Next Triathlon

8:00-10:00am

Anaheim Convention Center 204C

Map Cataloging Discussion Group (ALCTS / MAGIRT) / Cataloging and Classification Committee meeting (MAGIRT)

8:00am-12:00pm

Hyatt Regency Orange County Royal Ballroom A

Subject Analysis Committee (ALCTS CAMMS)

8:00am-12:00pm

Hyatt Regency Orange County Grand Ballroom C

Cataloging and Classification Research Interest Group

10:30am-12:00pm

Hyatt Regency Orange County Grand Ballroom E

Cataloging and Metadata Management Section Executive Committee II (ALCTS CAMMS)

10:30am-12:00pm

Hyatt Regency Orange County Garden 2

Cataloging Committee Meeting (GODORT)

10:30am-12:00pm

Sheraton Garden Grove Burgundy Room

Committee on Cataloging: Asian and African Materials (ALCTS CAMMS)

10:30am-12:00pm

Hyatt Regency Orange County Terrace E

Continuing Resources Standards Forum

10:30am-12:00pm

Hyatt Regency Orange County Grand Ballroom B

LC Bibliographic Framework Transition Update Forum

10:30am-12:00pm

Anaheim Marriott Grand Salon A-C

Linked Library Data Interest Group

10:30am-12:00pm

Hyatt Regency Orange County Garden 1

CaMMS/PCC Committee on Education Training Materials (ALCTS CAMMS)

1:30-3:30pm

Hyatt Regency Orange County Commodore Boardroom

Cataloging of Children's Materials (ALCTS CAMMS)

1:30-3:30pm

Hyatt Regency Orange County Barcelona



RDA Worldwide  
1:30-3:30pm  
Anaheim Convention Center 304AB

Authority Control Interest Group  
1:30-5:30pm  
Hilton Anaheim Pacific B

Continuing Education Committee (ALCTS)  
1:30-5:30pm  
Anaheim Marriott Suites Landmark

MARBI Committee II (ALCTS / LITA / RUSA)  
1:30-5:30pm  
Hyatt Regency Orange County Grand Ballroom A

**Membership Meeting (OLAC)**  
**4:00-5:30pm**  
**Sheraton Park Hotel Park BC**

PCC Participants Meeting  
4:00-5:30pm  
Anaheim Convention Center 213AB

How Will RDA Impact Your System?: A Forum of Vendors Discussing Implementation Plans  
4:00-6:00pm  
Anaheim Convention Center 204B

### **Monday, June 25th**

ALCTS Forum  
8:00-10:00am  
Anaheim Convention Center 204B

Cataloging and Metadata Management Section Executive Committee III (ALCTS CAMMS)  
8:00-10:00am  
Hilton Anaheim California B

Heads of Cataloging Departments Interest Group  
8:00-10:00am  
Anaheim Convention Center 209B

Kuali OLE: Developing & Implementing a Community Source LMS

8:00-10:00am

Anaheim Convention Center 213AB

MARC Formats Interest Group

8:00-10:00am

Hilton Anaheim Salinas

SAC Subcommittee on Genre/Form Implementation (ALCTS CAMMS)

8:00-10:00am

Hyatt Regency Orange County Madrid

Committee on Cataloging: Description and Access II (ALCTS CAMMS)

8:00am-12:00pm

Hyatt Regency Orange County Grand Ballroom A

OCLC — Cataloging Efficiencies: Managing Metadata for E-book Collections

10:30am-12:00pm

Anaheim Convention Center 210C

Policy and Planning (ALCTS CAMMS)

10:30am-12:00pm

Hyatt Regency Orange County Commodore Boardroom

RDA and Government Publications

10:30am-12:00pm

Anaheim Convention Center 201A

Continuing Resources Cataloging Committee Update Forum

1:30-3:30pm

Hyatt Regency Orange County Pacific Room

MARBI III (ALCTS / LITA / RUSA)

1:30-3:30pm

Hyatt Regency Orange County Grand Ballroom A

Technical Services Workflow Efficiency Interest Group

1:30-3:30pm

Anaheim Convention Center 202B

Descriptive Cataloging of Rare Materials (MSS) Editorial Group (ACRL RBMS)

1:30-5:30pm

Disneyland Hotel Columbia

Program Committee (ALCTS)

1:30-5:30pm

Hyatt Regency Orange County Barcelona

Subject Analysis Committee (ALCTS CAMMS)

1:30-5:30pm

Hyatt Regency Orange County Grand Ballroom C

## NEWS AND ANNOUNCEMENTS

Barbara Vaughan, Column Editor

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### Call for OLAC Conference Scholarship Applications

OLAC will award one Conference Scholarship that will provide funds for a member of Online Audiovisual Catalogers to attend the OLAC 2012 Conference in Albuquerque, NM, October 18-21, 2012. Website of conference: <http://olac2012.weebly.com/>

#### Eligibility:

Any personal member of OLAC who has never attended an OLAC Conference is eligible for the OLAC Conference Scholarship.

#### Award Description:

The award amount of up to \$1,000 will cover reasonable estimated costs for registration for the conference, preconference if desired, lodging, travel, and meals. The scholarship will be distributed after the conference in the form of a reimbursement, so the award recipient should save receipts.

#### Conditions/Requirements:

The recipient must confirm in writing that he or she will attend. The recipient must attend the full conference, including the business meeting where the award will be announced, and the recipient must write a brief report for the OLAC Board indicating what he or she gained and found to be most helpful in his or her work. This report will be published in the OLAC newsletter. Applicants must include a completed application form (below), a current resume, and a cover letter describing why the applicant wishes to attend the Conference, how the receipt/non-receipt of the scholarship will influence his or her ability to attend the conference, and potential applications to his or her present and future job responsibilities.

#### Application Deadline

The application and supporting materials must be received no later than Friday June 29, 2012. The award will be announced no later than Friday, July 20, 2012.

E-mail your application (form below) and supporting materials to: Ms. Sevim McCutcheon, [Lmccutch@kent.edu](mailto:Lmccutch@kent.edu)

The 2012 OLAC Conference Scholarship committee is Christina Hennessey (2010 recipient, Loyola Marymount University), Nerissa Lindsey (2010 recipient, Texas A&M International University) and Sevim McCutcheon (OLAC Past President, Kent State University).

2012 OLAC CONFERENCE SCHOLARSHIP APPLICATION FORM Please email the following information to Sevim McCutcheon, along with a cover letter and resume.

Name: (First MI Last)

Mailing Address:

Country:  
Daytime telephone:  
Email address:  
Place of employment:  
Position title:  
Personal member of Online Audiovisual Catalogers since:  
Brief description of job responsibilities/related non-print involvement/experience:

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### **OLAC Research Grant Award winner**

Congratulations goes to **Bobby Bothmann** as the winner of the 2012 OLAC Research Grant award.

His research is intended to generate an RDA companion to Nancy B. Olson's "Cataloging of Audiovisual Materials" (CAVM), providing cataloging examples for non-print formats using RDA guidelines and FRBR concepts.

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### **New CAPC Members**

The Cataloging Policy Committee (CAPC) of OLAC is pleased to announce new members on the committee. Joining CAPC as a full member is Mary Huisman, Music/Media Cataloging Coordinator at the University of Minnesota, whose term runs from June 2012-June 2014. Beth Cox, Special Formats Cataloger at Southern Illinois University, and Annie Glerum, Head of Complex Cataloging at Florida State University, will also be joining CAPC as interns. Their terms run from June 2012-June 2013.

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### **MOUG announces 2012 award winners**

The Executive Board of the Music OCLC Users Group (MOUG) is pleased to name **Sonia Archer-Capuzzo** as this year's recipient of the Ralph Papakhian Travel Grant. This award was established in 2011 to support attendance at the annual MOUG meeting and, in recognition of Ralph Papakhian's mentoring role in music librarianship, is especially intended to support newer members of the profession in both public and technical services.

The Executive Board of MOUG is also honored to name **Phyllis Jones** as the tenth recipient of MOUG's Distinguished Service Award. This award was established to recognize and honor those who have made significant professional contributions to music users of OCLC. The MOUG Executive Board selects recipients based on nominations received from the membership. The award was announced on February 15, 2012 during the MOUG Business Meeting in Dallas.

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### **WorldCat Local and music - MOUG recommendations update**

MOUG (Music OCLC Users Group) has been investigating the features of WorldCat Local that impact discovery of music materials. In April 2010, a draft of "WorldCat Local Enhancement Recommendations for Music" was released, and we have followed this draft with periodic updates. A new update on those recommendations and those received over the past two years is now available on the MOUG website: Music Recommendations for WorldCat Local Status Report (March 14, 2012) ([http://www.musicoclcusers.org/WorldCatLocalStatusRpt\\_20120314.pdf](http://www.musicoclcusers.org/WorldCatLocalStatusRpt_20120314.pdf))

Recommendations address:

\*Display and functionality of uniform/preferred titles \*Conference names \*Display of analytic and added entries \*Genre headings \*Display of fields related to production, performers, and recording \*External content from AllMusic \*Additional display and functionality issues

Previous updates as well as the original draft WorldCat Local Enhancement Recommendations for Music are available on MOUG's Public Services page, <http://www.musicoclcusers.org/reftools.html>.

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### **PCC Day One for RDA Authority Records will be March 31, 2013**

The PCC Policy Committee has identified the following date for PCC Day One for RDA Authority Records: **March 31, 2013**.

The date gives a year of lead time for NACO catalogers to be trained in NACO RDA authority work (training sessions coming in April!) and to develop a smooth and confident local workflow for those contributions. It provides a reasonable target date for the work that will need to take place in and with the authority file in preparation for RDA. It gives the vendor community time to plan. And because it matches the date for LC implementation of RDA, there will be less confusion for catalogers in keeping dates straight.

This means that for authority records:

- Saturday, March 30, 2013 is the last day that new AACR2 authority records will be permitted in the LC/NACO Authority File.
- Beginning Sunday, March 31, 2013, all new authority records entering the LC/NACO Authority File must be coded RDA.

This means that for bibliographic records:

- Beginning Sunday, March 31, 2013, all access points on bibliographic records coded “pcc” must be RDA, even if the bibliographic description follows AACR2.
- There is no set date for PCC institutions to begin contributing RDA bibliographic records. PCC continues to believe that institutions can set their own timetable for this transition.

More information on NACO RDA training and record review will be coming soon on PCCLIST. As soon as catalogers are trained on NACO RDA authority work, they may begin contributing those records to the LC/NACO Authority File, even before March 31, 2013. NACO training will be general training, and will focus on the differences between AACR2 and RDA heading and reference construction, and on the new fields that can be added to authority records. It will not cover specialized areas, such as music, law, series, and complicated uniform titles such as the Bible, Koran, etc. Some NACO Funnel Coordinators may wish to plan specialized training sessions in these areas to assure satisfactory understanding and record review prior to the March 31, 2013 implementation date.

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### Library of Congress Announces Its Long-Range RDA Training Plan

The U.S. RDA Test Coordinating Committee issued its first quarterly update on progress towards carrying out the recommendations made in the Committee’s Final Report issued in June 2011. The progress is very promising. Because the Library of Congress has such a large contingent of staff to be trained to apply *RDA*, we have determined that we will need sufficient lead time to get everyone trained. To set the training plan in motion, we needed to determine a target RDA Implementation Day One. As will be seen in the attached plan, we have determined that date to be **March 31, 2013**.

LC’s partner national libraries (U.S.: National Agricultural Library and National Library of Medicine; and non-U.S.: British Library, Library & Archives Canada, Deutsche Nationalbibliothek, and National Library of Australia) have been apprised of our plan and also intend to target the first quarter of 2013 as their RDA implementation date, i.e., **between January 2 and March 31, 2013**.

We are now sharing our plan broadly to alert our various constituencies. By doing so as early as possible, we hope that this will help others prepare for RDA implementation. As we update the plan, we will continue to share it, along with documentation, training, and other related information on LC’s Resource Description and Access (RDA)—Information and Resources in Preparation for RDA Website (<http://www.loc.gov/aba/rda/>).

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### LC to develop Medium of Performance Thesaurus for Music in cooperation with the MLA

The Library of Congress, in cooperation with the Music Library Association, has begun to develop a new thesaurus of terms representing vocabulary for the medium of performance of musical works. The vocabulary is intended to be used, at least initially, for two bibliographic purposes:

- to retrieve music by its medium of performance in library catalogs, as is now done by the controlled vocabulary, Library of Congress Subject Headings (LCSH);

- to record the element “medium of performance” of musical works, as represented in individual music resources cataloged according to *RDA: Resource Description and Access* (RDA).

**Background**

Medium of performance is now recognized as a separate and distinct bibliographic facet that should have its own vocabulary and vocabulary structure. Searches by medium enable users to retrieve music by a particular instrument or instrumental group, voice or vocal group, through a medium term alone or in any combination with other medium terms the searcher may specify.

As currently incorporated into LCSH, medium of performance terms may occur in subject headings in two ways: either along with a term for genre, form, type, or style of music, or in subject headings that have only one or more medium terms in them. Eventually, *Library of Congress Genre/Form Terms for Library and Archival Materials* (LCGFT) will contain the terms for genre, form, type, style, etc., of music. When such music terms are implemented in LCGFT, it is envisioned that we will cease including such terms in LCSH strings. In that way, LCSH continues towards the direction set with the LCGFT initiative, to reflect more what a work is about, leaving what a work is to LCGFT, and showing what the medium of performance is through use of the new *Library of Congress Medium of Performance Thesaurus for Music* (LCMPT).

Our intention is to use the *Library of Congress Medium of Performance Thesaurus* as a source vocabulary for RDA’s “medium of performance” element. Currently, RDA contains only a small representative selection of all of the terms that could be used for medium of performance. It should also be noted that any library’s adoption of this new Medium of Performance Thesaurus could proceed independently from any cataloging code or communications standard the library may adopt.

As part of developing this new thesaurus of medium of performance terms, the terms will be defined and their relationships to each other made explicit. The thesaurus will contain many terms familiar to users of LCSH but there will be more terms than LCSH provides. The thesaurus will sometimes use different terms than LCSH uses for the same concept. Once the new thesaurus appears in structured form and is implemented, updating will take place at the Library of Congress according to a regular schedule and with the same cooperative participation by other libraries as is now done for LCSH and LCGFT.

Questions may be sent to Geraldine Ostrove, Policy and Standards Division, Library of Congress ([gost@loc.gov](mailto:gost@loc.gov))

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**Genre/Form headings for Globes**

In 2009 the Library of Congress’ Policy and Standards Division (PSD) and LC’s Geography and Maps Division (G&M) began a project to develop genre/form terms for cartographic materials. In 2010 approximately 60 terms were approved for use and implemented. However, an important issue has not yet been resolved: What is the appropriate genre/form treatment for globes?



PSD and G&M have collaborated on a discussion paper that proposes an answer to this question. The paper is available on LC's web site at <http://www.loc.gov/catdir/cpso/genreformgeneral.html> and responses may be sent to Janis L. Young, LC's genre/form coordinator, at [jayo@loc.gov](mailto:jayo@loc.gov) by July 31, 2012.

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### **Sports-specific genre/form headings cancelled**

The Policy and Standards Division of the Library of Congress plans to cancel sport-specific moving image genre/form terms from *Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT)* on June 18, 2012. In all, 24 terms of the type **[sport] films** and **[sport] television programs** (e.g., **Curling films; Tennis television programs**) will be cancelled.

*Library of Congress Subject Headings (LCSH)* policy, which permits headings to be established based on the terminology used in works about the films, is unchanged. Therefore, if a work is written about curling films, for example, a proposal may be made to add curling films to *LCSH*.

The rationale for cancelling the sport-specific genre/form terms, along with the list of terms to be cancelled, is available on the Library of Congress' web site at [http://www.loc.gov/catdir/cpso/genre\\_form\\_sports\\_terms\\_cancellation.pdf](http://www.loc.gov/catdir/cpso/genre_form_sports_terms_cancellation.pdf).

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### **Parallel records and the 936 field**

When the concept of parallel records for language of cataloging was introduced to broad usage within WorldCat in 2003, OCLC provided the option for libraries to record the OCLC control number of parallel records that they identified in field 936. We had hoped to use this field to collocate records at some future date. With the passage of time and the development of other tools for bringing records together, most notably [GLIMIR](#), we now know that we will not be using the 936 field for this purpose. Therefore, we are discontinuing use of the 936 field for recording OCLC numbers of parallel records at this time. The *Bibliographic Formats and Standards (BFAS)* document has been changed to reflect this decision.

OCLC plans to delete any existing 936 fields that contain OCLC control numbers for parallel records from records in WorldCat beginning in July 2012.

For more information on Parallel records see Section 3.10 in BFAS: <http://www.oclc.org/us/en/bibformats/en/specialcataloging/default.shtm>

## REVIEWS

Katie Eller, Column Editor

### **No Shelf Required 2 : Use and Management of Electronic Books**

Edited by Sue Polanka

*No Shelf Required 2* is the follow-up title to *No Shelf Required : E-books in Libraries* (2011), also edited by Sue Polanka. Both titles are based on her blog, *No Shelf Required*, about the struggles librarians face as they try to incorporate e-books into their collections. *No Shelf Required 2* shares how libraries of the three main types (academic, public, and school (K-12)) are getting e-books into the hands of their users and managing these new electronic collections.

Editor Sue Polanka has quite the resume. She has been working in public, academic, and government libraries for over 20 years, and she has written and edited several works on electronic media, including her column, "Off the Shelf," for *Booklist*. The list of contributors she has compiled is also impressive. Experiences range from public and academic libraries to school library media centers and vendor services. Most authors have a master's degree in library science or a related field, and some, like Kathy Parker, broke ground in e-book services.

*No Shelf Required 2* is a collection of 16 individual chapters on the use and management of e-books in libraries. These chapters could just as easily be read selectively as they could straight-through. The first few chapters address how e-books are changing the nature of the library, both as a physical space and as a service model. The middle chapters explain how to manage an e-book collection, from tips on weeding and e-book preservation to the role of RDA in e-book cataloging and the accessibility issues presented by e-books and e-readers. The second half of the book provides examples and case studies from librarians who took the initiative to begin e-book and e-reader lending programs in their various institutions. For anyone, but especially for managers of smaller libraries and school library media centers, these chapters provide the most practical advice.

Two of my favorite chapters were "Do E-books Bridge the Digital Divide?" by Sarah E. Twill and "What is RDA, and Why Should E-book Managers Care?" by Steve Kelley. Twill's chapter makes a great case for librarians to build partnerships with social workers and public policy makers to make e-books and e-readers accessible to families with less than \$30,000 in annual income. Without our help, the surge in the popularity of e-books may separate these people even more from wealthier families in their levels of information literacy.

"What is RDA, and Why Should E-book Managers Care?" by Steve Kelley is an easy-to-read and thorough account of the development and purpose of RDA. For any cataloger who has forgotten the basic principles, this chapter provides a good review. At only 11 pages with diagrams, it would also serve as a good introduction for library administrators and other staff who may not be familiar with RDA at all.

One of the most interesting parts of the book also became my greatest complaint. A special section, "Spotlight : HarperCollins, OverDrive, and the ALA," by Michael Porter, provides a history and review of the online commentary from librarians and other interested parties in the "26 check-out rule" established by HarperCollins for OverDrive titles in 2011. While I loved the content of the piece, it seemed to have been added to the book at the last minute, because it was filled with grammatical and typographical errors that were not present in the other chapters. The most glaring mistake was the misspelling of author Neil Gaiman's name as "Neil Gaimin" (p. 151). It was distracting from an otherwise interesting report.

All in all, *No Shelf Required 2* was an enjoyable read and a nice way to learn about what librarians in several different types of libraries are doing to better serve their user populations. Editor Sue Polanka and her contributors are not afraid of the move to more digital content in libraries, and the expertise that they share is beneficial to library students and library employees, especially to those who find themselves on their institutions' electronic resources committees.

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Reviewed by:  
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OLAC Newsletter Book Review Editor  
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**OLAC CATALOGER'S JUDGEMENT:  
QUESTIONS AND ANSWERS**

**Compiled by Jay Weitz**



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**Fit the Kit or Quit**

**Question:** Is it always better to use individual 007s when one has a kit or is the 007 for kit okay by itself? Or should one use both the 007s for the separate pieces and the 007 for kit? Or does it not matter? And, if one creates a record with the principal type of material and not as a kit, then can one not use the 007 for kit?

**Answer:** Here's what BFAS says on the 007 (<http://www.oclc.org/bibformats/en/0xx/default.shtm>): "Use an appropriate 007 field if you are cataloging microforms, motion pictures, nonprojected graphics, projected graphics, videorecordings, etc., that are published separately. In addition, use field 007 for electronic resources, globes, maps, microforms, motion pictures, nonprojected graphics, projected graphics, remote-sensing images, sound recordings, tactile materials, and videorecordings that are components of kits." The Kit 007 is pretty worthless, but it could theoretically be used on any Kit record that follows the AACR2 definition of "Kit", to wit:

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"). See also *Activity card, Game*.

Probably the individual 007s are more meaningful. If the resource doesn't fit the "kit" definition, the record should not include a Kit 007.

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**More Proliferating MP3s?**

**Question:** I'm hoping you can help me. I have an optical disc which contains MP3 files of music. What is the correct way to code this in MARC? He is my attempt:

- Sound Recording workform.
- Type: "j".

- 006: Type “m” and File “h”.
- 007 for Electronic Resource.
- 300: 1 computer disc (9 files) : digital, mp3 file ; 4 ¾ in.

Does this seem correct, or should I use “1 sound disc” in the 300? And last week, I cataloged a book with an accompanying disc of MP3 files. So, would that require an additional 006 for the sound recording?

**Answer:** For an optical disc containing musical MP3 files, you would use the musical Sound Recording workform (Type “j”). Include an Electronic Resource 006 for the electronic aspects, coded as you’ve suggested. Include both an Electronic Resource 007 and a Sound Recording 007. In the 300 field, you may describe the disc following either of the options noted in 9.5B1 and its LCRI, “1 computer optical disc” or using an appropriate “term in common usage” for the physical medium of your disc (such as “CD-ROM”). You can include the number of files parenthetically “if readily available and considered to be important” (9.5B4). The rest of your 300 field is correct, except that “MP3” should be capitalized. In an AACR2 record, the GMD would be “[electronic resource]”. For a book with an accompanying disc of MP3 files, a Sound Recording 006 would be advisable.

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### Repeating Ourselves

**Question:** We’re in the middle of cataloging a massive set of Artur Rubinstein sound recordings, with two accompanying DVDs (for a total of 144 discs). We have language content associated with the CDs (an interview in English, plus the program notes) and language content associated with one of the DVDs (in English, with optional French and German subtitles). I was wondering how to slam this all together into a single 041 when it occurred to me to check if the 041 is repeatable – and it is. However, there are no examples I can find in either BFAS or in the MARC documentation about when to repeat field 041. And without the subfield \$3? I’m not sure how you’d designate which 041 went with what. Would this be a situation where separate 041s for the CDs and the DVDs would make sense?

**Answer:** MARC 21 doesn’t say it outright, but the intention was to repeat field 041 only when more than one type of language coding scheme is used. Here’s what the “Content Designator History” says, in part: “In 2001: the practice of placing multiple language codes in one subfield, e.g., \$a engfreger, was made obsolete and subfields \$a, \$b, \$d, \$e, \$f, and \$g were changed from Not-repeatable (NR) to Repeatable (R). The field was also changed from Not-repeatable (NR) to Repeatable (R) to accommodate non-MARC language codes.” In that final sentence, you have to read between the lines to determine the intention of repeating the field. If you are cataloging the whole shebang on a single bibliographic record, the 041 would be something like the following, if I’ve interpreted things accurately:

041 1 eng \$j fre \$j ger \$h \$d eng \$g eng. It's doubtful that Connexion would object to the input of multiple 041s using the same encoding scheme, but as you note, there's no way to delineate (via subfield \$3, for instance) what is what. You can outline the details in a 546 and/or 500 and/or 505, as appropriate.

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### New 041 Subfields in Concert

**Question:** I've just come across another one of those crazy CD/DVD packages where the same concert performance is on each. In this case, I've decided that the CD is the primary object, so I'm using the Sound Recordings workform. Everything on the CD is piano music, so my language fixed field value is "zxx". There's an accompanying booklet containing program notes in English, French, and German. Of course, the DVD not only contains the concert (71 min.), but it also has a 10 minute "behind the scenes" bonus about making the recording. This is in English and Turkish (interspersed) with optional English, French, and German subtitles. This is where I'm getting confounded on the 041. The DVD obviously has a language (well, I think two languages) that would normally be recorded in the 041 subfield \$a, but recording that information there somehow seems to misrepresent my primary object, the CD. Naturally, I have no problem encoding the subfield \$j values. What do you advise?

**Answer:** If you are following the LC "New Sound Recording Formats" recommendations (<http://loc.gov/catdir/cpsoundrec.pdf>) and treating the DVD as accompanying material (in 300 subfield \$e), then one can justify coding the languages on the DVD in 041 subfields \$g, \$j, and \$m. Of course, describe the whole situation in notes. By the time you read this, subfields \$k (Language Code of Intermediate Translations), \$m (Language Code of Original Accompanying Materials Other Than Librettos), and \$n (Language Code of Original Libretto) will have been implemented in WorldCat as part of the 2012 OCLC-MARC Update.

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### Accompanying Matter Can be Neither Created nor Destroyed, Only Changed in Form

**Question:** I'd appreciate your advice on the following question: If cataloging for a CD matches in every respect except for the length of the program notes, is a new record justified? Example: OCLC #707958438 has the following information in a 500 note: "Program notes in English with French and German translations (13 p. : ill. ; 13 cm.) inserted in container." Our record matches, except that we have: "Program notes by Mischa Donat in English (6 p. : port.) inserted in container." Do we add our holdings to the existing record and make a note for local purposes that we do not have the trilingual program notes, or should we input a new record?

**Answer:** Earlier this year, our QC Policy group met and decided to significantly change how we consider accompanying material in bibliographic records when it comes to creating new records. This is the official statement we've been using when questions come up: "Regarding the matter of taking accompanying material into account when matching/merging MARC records in WorldCat: OCLC WorldCat Quality Management staff have been actively discussing the concerns raised about the current policy that does not take accompanying material into account. We have listened to the membership and consequently some changes are in the works regarding how accompanying material will be treated for matching and merging. We will make an announcement on OCLC-CAT and other relevant cataloging lists with full explanation once we have a timeframe for the installation of the changes. Please be patient until then; no timeframe is currently available." It's going to take us a while to figure out ways to incorporate this change of policy into how DDR, Batchload, and other mechanisms that use our matching algorithms treat records, but in extremely broad and oversimplified terms, we will pay attention to the presence of field 300 subfield \$e. The change is meant to allow us to differentiate, for example, a book published alone from a read-along book published with the corresponding CD. That being said, however, the example that you ask about, where accompanying program notes differ in length but do not fundamentally change the way that the main resource is used, does not now and would not in the future justify separate records. We'd suggest using the existing record, editing locally to reflect your version of the program notes, and only if you think it worthwhile, noting that different versions of the program notes have been made available by the publisher.

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### **More on the Law of the Conservation of Accompanying Material**

**Question:** We just got in a clutch of CDs for our elementary education majors. They have music and lyrics to help younger kids with coordination, creativity, and basic motor skills. (Body Bingo, Rhythm Sticks Rock, Everybody Dance!, "Catch a Brain Wave" Fitness Fun—you get the idea.) There are always lyrics, credits, and usually instructions for doing the dance, playing the game, etc., sometimes with suggestions for how to extend the activities. This information is sometimes in a typical printed booklet slid under the front tabs of the jewel case. But sometimes all you get is a URL for a website where the lyrics and instructions are. Other times the same information is on the disc as a PDF file. (At least once I got one with the physical booklet AND the PDF.) I'm discovering that I often can't find matching records for the delivery method of the liner notes. I do find matches when the method is discounted, also records where the liner notes are not mentioned at all. If I were to follow the publication *Differences Between, Changes Within*, it almost looks like I could input a new record. It says: "A5ed. Accompanying Material. The presence vs. absence of accompanying material, or a difference in accompanying material if it affects use of the main work, is MAJOR." The example given is a filmstrip with a cassette for the sound as opposed to one with a disc for the sound. I'm guessing the reason is the sound is essential to use of the filmstrip and the need to have the right playback equipment. My liner notes are very

important to the use of the music due to having instructions for doing the activities while the music is playing. Physical liner notes need only daylight or electricity. Liner notes on a Web site or PDF require not only electricity but also a computer. Am I stretching things? I'm an OCLC user, however, and OCLC discounts accompanying material altogether in determining a match. Is this one of the places where DBCW differs from BFAS's "When to Input a New Record?" I'm thinking I have to use the existing records with the wrong format of liner notes and edit locally; and if I put in a new record, it will eventually get merged by DDR anyway?

**Answer:** The whole issue of accompanying material has been a contentious one. Just in recent weeks, our QC Policy group has made a change to how we consider accompanying material, but we are still working through how exactly to implement the new practice, especially in how we treat such materials in DDR (see the previous Q&A). As you well know, there are several ways to account for the presence of accompanying material in a bibliographic record, dependent upon such factors as the importance of the material in relationship to the whole resource, the substantial value of the material in itself, whether it gets treated in 300 subfield \$e or in a note, and the mood of the cataloger on that particular day. Because the same accompanying material can be both interpreted and accounted for in multiple ways, it has always been extremely difficult (that is, impossible) for us to compare bibliographic records reliably in this respect. So far, the only means of making distinctions that can be programmatically logical is not to match a record with 300 subfield \$e with a record lacking 300 subfield \$e. Obviously, that is a blunt instrument that will cause us to miss lots of human-readable duplicates (as well as some other possible mishaps we've only thought about at this point), but it's the best we've come up with so far. As you can imagine, trying to mine 5XX notes for data about accompanying material (in general 500 notes, 505 contents notes, 520 summary notes, possibly buried in other random notes) would be treacherous at best. Your question about remotely-accessed accompanying material versus tangible accompanying material merely complicates the issue even more, adding what might be considered another dimension to the issue. But it does highlight aspects of the dilemma, both as defined in "When To Input a New Record" and in *Differences Between, Changes Within*. How does one interpret "affects the use of the main work"? Technically, in that one needs different equipment to play an audio cassette versus a CD, for instance? Substantively, in the sense that, for instance, one would lack the instructions for performing an activity, playing a game, and/or doing a dance if one lacked either the print or the online accompanying material, and so be unable to fully take advantage of the main resource? The official statement in the previous Q&A really doesn't help you much. The issue of tangible versus online accompanying material is one we will have to include in our further deliberations, but it sure seems like another distinction that bibliographic records are not currently designed to make clear. In the meantime, if there is a record for the resource with the tangible accompanying material, may I suggest using that and editing it locally. You might also consider editing the master record to suggest that in some issues of the material, the accompanying material is accessible only online, with the URL noted. Or whatever happens to be appropriate. Suggestions about how we might better deal with the whole mess would be welcome.

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## Relating the Distinctions

**Question:** We've got questions about the use of several MARC relator codes and terms that have generated a lot of discussion amongst our staff regarding their interpretation and scope.

1. "Adapter (adp): Use for a person or organization who 1) reworks a musical composition, usually for a different medium, or 2) rewrites novels or stories for motion pictures or other audiovisual medium." Is this code allowed only for adaptations of musical compositions and rewriting books for motion pictures, etc.? Or is it possible to use this relator code also for someone who has adapted a text of a book or for someone who has made another kind of adaptation of a publication?
2. "Author (aut): Use for a person or organization chiefly responsible for the intellectual or artistic content of a work, usually printed text. This term may also be used when more than one person or body bears such responsibility." "Author of screenplay, etc. (aus): Use for a person or organization responsible for a motion picture screenplay, dialog, spoken commentary, etc." "Scenarist (sce): Use for a person or organization who is the author of a motion picture screenplay." Which relator code should be used for the books called "comics" or "comic strips." The author who writes the text of a comic strip is often called "the writer of the scenario." We get the impression that the code "sce" may be used for motion pictures only; the code "aus" suggests that it is also applicable for motion pictures only. So would the code "aut" be the most suitable for the writer of the scenario of a comic strip?
3. Author of screenplay, etc. (aus) and Scenarist (sce): What is the difference between "aus" and "sce"? Is there a difference between "responsible for" and "author of"?
4. "Editor (edt): Use for a person or organization who prepares for publication a work not primarily his/her own, such as by elucidating text, adding introductory or other critical matter, or technically directing an editorial staff." "Redactor (red): Use for a person or organization who writes or develops the framework for an item without being intellectually responsible for its content." Can you explain the difference between "edt" and "red"?
5. "Narrator (nrt): Use for a person who is a speaker relating the particulars of an act, occurrence, or course of events." "Storyteller (stl): Use for a person relaying a story with creative and/or theatrical interpretation." Can you explain the difference between "nrt" and "stl"? Is the difference the "creative and/or theatrical interpretation"? Which code should be used for a person who tells the text of a spoken book? The code "stl" implies "creative interpretation and/or theatrical interpretation." Is this the case when someone tells the text of a spoken book, or should we use the code "nrt"?

**Answer:** Overlapping, contradictory, and otherwise related MARC Relator Codes have long been a source of vexation among catalogers. There was a Q&A addressing the same general issue in the *OLAC Newsletter* 26:1 (March 2006) page 66 (available online at <http://olacinc.org/drupal/newsletters/2006March.pdf>; pages 61-62). Although it happens to ask a question similar to your Question 2, the answer has general application to pretty much all of your questions. The main point of that answer is this: "[T]erms on the list have come over the years from a wide variety of cataloging communities, each with its own terms, definitions, and needs. The resulting *MARC Code List for Relators* has never been fully coordinated to minimize or eliminate overlap or redundancy." So, the short answer is that you should not read too much into what appear to be subtle

differences among similar terms and codes. Furthermore, unless there are good reasons not to do so, generally use the term itself as your guide rather than be limited by an unnecessarily narrow definition. The best overall policy is for an institution to review the relator codes/terms that its catalogers think they will most commonly use; make decisions about which ones will be most useful, descriptive, and clear in most situations; document those decisions; and then be consistent in using those codes/terms and sticking to the policy. You may even want to go so far as to say that certain codes will not be used or that a particular code will always be favored over another code. As part of the documentation process, you may also want to add their own local revisions to the definitions to assist other catalogers. That being said, let me try to address your specific questions below.

1. Adapter (adp): This is a case where the definition of the term/code is relatively narrow because of its original source. You may reasonably use this code for anyone who has adapted anything.
2. Author (aut); Author of screenplay, etc. (aus); Scenarist (sce): Code "aus" is probably best limited to persons responsible for motion picture screenplays, mostly because that's what the term itself states ("Author of screenplay, etc."). If the writer of a comic strip text is referred to as a "scenarist" or "writer of the scenario," I'd say that using "sce" is perfectly permissible. This is a case where an institution may want to choose the more general "author" over more specific sorts of authorship such as "scenarist" for the sake of consistency and sanity, but that's an institutional decision.
3. Author of screenplay, etc. (aus) and Scenarist (sce): Whoever wrote the definition for "author of screenplay" was probably just trying to avoid using the term "author" itself; don't read anything into that.
4. Editor (edt); Redactor(red): To my mind, an "editor" has a deeper intellectual responsibility than a "redactor." An "editor" does the all stuff noted in the definition and more, whereas a "redactor" establishes a sort of template, then steps away to let others do the intellectual work.
5. Narrator (nrt); Storyteller (stl): Here's how I think of the distinction in this case, although there can be lots of overlap and ambiguity. A "storyteller" is responsible for how something is told, usually including the voice/voices, the text, the style, the interpretation, and so on, giving a personal spin to a story or other narrative. Storytelling can refer to either a literal "telling" in a vocal sense or a "telling" in a textual sense. A "narrator" seems to me more outside or above the action or story itself. In such media as film or different forms of theatre, this could take such common forms as a voiceover or a person who introduces, explains, provides narrative links, and the like. Although this will not always be the case, I tend to think of a "storyteller" as responsible for the story being told and a "narrator" as relating a story written by someone else. Many audiobooks identify as the "narrator" the person who reads the book in question; this may or may not be the person who wrote the book, but in either case, I'd say calling that person a "narrator" makes sense (as well as an "author" in the cases where that same person wrote the book). This isn't to say that someone who "narrates" an audiobook written by someone else isn't giving a "creative and/or theatrical interpretation."

## NEWS FROM OCLC

Compiled by Jay Weitz



### General News

#### **OCLC Earns ISO Information Security Management Certification**

OCLC has achieved International Organization for Standardization (ISO) certification for information security management, recognition that provides several benefits including compliance with various privacy frameworks, improved security, clearer definition of security roles, and standardized quality procedures. OCLC achieved ISO 27001:2005 certification from Lloyd's Register Quality Assurance. The ISO 27001 certification complements OCLC's current ISO 9001:2008 Quality Certification. The certification confirms that OCLC is meeting a recognized international standard for security management. This standard recognizes OCLC's capability to manage information security related to the provision of secure IT infrastructure and data center management. The ISO 27001 standard provides IT-related security management system controls that help satisfy the requirements of many regulatory standards. ISO 27001 recognizes that an organization conforms to acceptable standards of quality at every stage of its product or service through a series of documented, repeatable processes.

#### **OCLC Opens New Data Center in Sydney, Australia**

OCLC is now operating a new data center in Sydney, Australia, to support OCLC WorldShare Management Services for members in Australia and New Zealand. The Sydney center becomes the fourth data center in OCLC's global network. OCLC opened a data center in the United Kingdom in December 2011 and maintains its two primary operations data centers in the United States. The Sydney center employs state-of-the-art technologies to ensure high levels of performance, reliability, scalability, and cost-effectiveness. Key facilities features include high performance Internet services with multiple service providers to ensure efficient routing, fully redundant heating and cooling systems, continuous power from multiple sources, and best of breed security controls and practices. In addition, the new center enables OCLC to comply with access and data privacy requirements in Australia and New Zealand and adhere to technical standards that promote the cost-effective, worldwide sharing of information across platforms, scripts, languages, and cultural materials. OCLC recently obtained its ISO 27001 certification which bolsters the position of trust in OCLC-hosted solutions and will assure the security of member data. The new data center will support the introduction of OCLC WorldShare Management Services, a new cloud-based approach to managing library services cooperatively that gives libraries more time to serve community needs. WorldShare Management Services provides the tools to streamline library workflows, reduce costs and provide new opportunities for collaboration—to connect knowledge in new ways from a globally linked network of library collections to today's digitally empowered user.

## Expansion of the OCLC Control Number

WorldCat continues to grow. The OCLC Control Number is anticipated to reach one billion after July 1, 2013. At that point, OCLC will increase the length of the OCLC number to accommodate a variable length number string. If you use and/or store OCLC MARC bibliographic records and the OCLC Control Number, you will notice a change after July 1, 2013. You will need to check the systems at your institution that use OCLC MARC bibliographic records and the OCLC number. You may need to implement changes to ensure those systems will be able to successfully handle the longer OCLC number effective July 1, 2013. For example, libraries may be impacted in the following areas:

- Cataloging and IT librarians that download OCLC MARC bibliographic records to the library's local system.
- Resource sharing librarians using third party ILL management programs that store or use the OCLC number for searching.
- Reference services librarians using WorldCat Local to help a patron locate an item.

Publishers, vendors and others that partner with OCLC may be impacted as follows:

- Integrated Library Service (ILS) vendors that use OCLC MARC bibliographic records to test compatibility with OCLC.
- Publishers, material suppliers and eContent providers that use OCLC MARC bibliographic records in their systems.
- Developers maintaining services that use OCLC Control Number.

**Format of the OCLC Number:** The OCLC Number resides in the MARC 001 field and may also be stored in other fields. The OCLC Number in the 001 field is formatted as follows, and may appear in one or more of these forms in the record:

OCLC numbers 1 through 99999999:

- "ocm" prefix.
- oclc control number, 8 digits, right justified with leading zeros.
- a blank space as the last character.  
Example: ocm00012345

OCLC numbers 100000000 to 999999999:

- "ocn" prefix.
- oclc control number, 9 digits.  
Example: ocn123456789

OCLC numbers 1000000000 and higher:

- "on" prefix.

- oclc control number, 10 or more digits.

Example: on1234567890 or on1234567890123

When stored in the 035 field, the OCLC number is usually stored with the prefix (OCoLC) and without the “ocm”, “ocn” or “on” prefixes; for example: (OCoLC)1234567890. When this change takes place, the “on” prefix will be used to identify OCLC Numbers that contain ten or more digits. Nine or eight digit OCLC Numbers will continue to use the “ocn” or “ocm” prefix as described above. The update to the OCLC Number is backwards compatible so that previously defined OCLC Numbers will not be impacted. Previously assigned OCLC Numbers will continue to work as before.

**What action should you take?** If you use and/or store OCLC MARC bibliographic records and the OCLC Control Number, you will notice a change after July 1, 2013. You will need to check the systems at your institution that use OCLC MARC bibliographic records and the OCLC number. You may need to implement changes to ensure those systems will be able to successfully handle the longer OCLC number effective July 1, 2013.

**For more information:** See more technical information regarding this change at <http://www.oclc.org/us/en/batchprocessing/number-expansion.htm>. Also, visit <http://www.oclc.org/batchprocessing/controlnumber.htm> to learn how OCLC Control Numbers are created and how OCLC Batchload services give libraries the ability to match, merge, format, and synchronize OCLC Control Numbers between their local systems and WorldCat.

### **Richard Wallis Joins OCLC Staff as Technology Evangelist**

Richard Wallis, a consultant and distinguished thought leader in Semantic Web and Linked Data technology, has joined the OCLC staff as Technology Evangelist. He will be based in Birmingham, United Kingdom. Mr. Wallis brings to this new position expertise and experience in emerging data standards and their applications—in libraries and on the wider Semantic Web—to help establish libraries and WorldCat at the core of an emerging Web of data. He will collaborate with members and facilitate projects with OCLC teams as libraries and the cooperative continue their efforts to expose WorldCat data as linked data. Mr. Wallis will engage library and information technology leaders in discussions of OCLC’s mission and vision, and will help shape the global library cooperative’s approach to data sharing and standards in the future. OCLC is implementing a variety of applications for library linked data, such as VIAF and FAST. Mr. Wallis will help to accelerate and further efforts to expose WorldCat data as linked data. Mr. Wallis established Data Liberate, a consulting organization, in January 2012 after having been with Talis, a Linked Data and Semantic Web technology organization in the United Kingdom, for over 20 years. As Technology Evangelist, he has been at the forefront in promoting, explaining, and applying new and emerging Web and Semantic Web technologies in the wider information world. He is an active blogger, and was a regular podcaster in the “Talking with Talis” series. From 2008 to 2010, he hosted and chaired "Library 2.0 Gang," a monthly round-table podcast series that brought together thought leaders, movers and shakers, and executives from leading organizations in library technology. In his new role at OCLC, Mr. Wallis is expected to travel extensively, particularly throughout Europe and

the United States, participate in conferences and programs, and continue blogging on emerging Web technologies.

### **Cataloging and Metadata**

#### **Connexion Client 2.40 is Released**

Connexion client version 2.40 includes the following enhancements: Classify, MARC Update, RDA workforms, GLIMIR, and more. Version 2.40 is compatible with both 32-bit and 64-bit versions of Microsoft Windows and supports Windows XP, Windows Vista, and Windows 7, but does not support Windows 2000. Version 2.40 uses .NET Framework 4 Extended which is supplied with the Connexion client 2.40 software. You will be required to upgrade to version 2.40 by 2012 October 1. An upgrade warning message will begin appearing when you start version 2.10, 2.20, or 2.30 beginning in early August 2012. Connexion client is the Windows-based interface to Connexion. This announcement does not impact the Connexion browser, which is the Web-based interface to Connexion. View information about Connexion client or download the software at <http://www.oclc.org/us/en/connexion/interface/client/enhancements/recent.htm>. View the upgrade instructions at <http://www.oclc.org/us/en/support/documentation/connexion/client/gettingstarted/gettingstarted/gettingstarted.pdf#page=31>.

#### **DDC Abridged Edition 15 is Now Available**

For libraries with collections of 20,000 titles or fewer, the abridged edition of the Dewey Decimal Classification (DDC) system provides the level of detail needed to classify the materials in those collections. Abridged Edition 15, published in early 2012, reflects the many changes to the body of human knowledge that have occurred since Abridged Edition 14 was published in 2004. Packaged in one convenient, affordable print volume, the abridged DDC provides Dewey numbers that are compatible with the unabridged edition should a library's collection expand and require deeper classification detail. Major changes, selected major updates and new numbers make Abridged 15 better than ever. Abridged Edition 15, the latest print edition of the DDC, includes new features such as:

- Many new topics and significant updates to selected fields.
- A complete overhaul to the representation of groups of people.
- Elimination of dual headings and unbalanced spans.
- Cessation of partial abridgement of parallel notation.

View a recorded webinar, *DDC Abridged 15 Sneak Preview*, at <https://oclc.webex.com/oclc/lsr.php?AT=pb&SP=EC&rID=52767757&rKey=eef11aa954f7cff4>.

#### **VIAF Becomes OCLC Service; Contributors Shape Direction Through VIAF Council**

VIAF (Virtual International Authority File), a project that virtually combines multiple name authority files into a single name authority service, has become an OCLC service. OCLC will continue to make VIAF openly accessible and will also work to incorporate VIAF into various OCLC services. This transition from an interim, shared-governance arrangement to OCLC having primary responsibility for maintenance of VIAF and offering it as an OCLC service is done in agreement with institutions participating in VIAF. The

change has been made to assure that VIAF will be well-positioned to scale efficiently as a long-term, cooperative activity. The transition also assures that <http://viaf.org> will continue to have appropriate infrastructure to respond to rising levels of traffic as VIAF gains momentum and popularity as a resource for library authority work and linked data activities. The institutions contributing to VIAF will continue to help shape VIAF's direction through participation in a newly-formed VIAF Council which will provide guidance on policies, practices, and operation of VIAF. At present, 22 agencies from 19 countries have contributed data to VIAF. Data is contributed on a non-exclusive basis. Concurrent with the change in governance structure, OCLC has begun shifting operational responsibility for VIAF from OCLC Research to OCLC's production areas. VIAF will continue to be made available through <http://viaf.org>. A brief history of the organization of VIAF:

- In April 1998, the United States Library of Congress (LC), the German National Library (Deutsche Nationalbibliothek, or DNB), and OCLC embarked on a proof-of-concept project to test linking each other's authority records for personal names.
- The VIAF Consortium was formed by written agreement of LC, DNB, and OCLC signed on 2003 August 6 during the International Federation of Library Associations and Institutions (IFLA) conference in Berlin, Germany.
- The National Library of France (Bibliothèque nationale de France, or BnF) joined the consortium with an agreement effective 2007 October 5.
- These four organizations—LC, DNB, BnF, and OCLC—assumed the role of Principals in the consortium, having joint responsibility for VIAF with OCLC hosting VIAF and supplying the software, and the participating institutions supplying the authority and bibliographic data content. Additional organizations later joined the consortium as Contributors, providing source files and expertise to advance the state of VIAF.
- With the successful proof of concept of VIAF, discussions begin in earnest among the Principals in 2010 about a suitable long-term organizational arrangement for VIAF. After considering various options, the Principals and Contributors agreed to shift VIAF to an OCLC service. During 2011 details of the transition were discussed and agreed to.

More information about VIAF is available at <http://www.oclc.org/viaf/>.

### **OCLC, Bibliotheek.nl to Include Collections of Dutch Public Libraries in GGC**

OCLC and Bibliotheek.nl, the organization of Dutch public libraries, have signed an agreement to include the complete collections of public libraries in the GGC, the Dutch shared cataloguing system. The agreement to include collections of Dutch public libraries will serve as a foundation for the new Dutch National Library Catalogue, and will make these collections visible through WorldCat.org. Prior to this agreement, collections from the Dutch National Library, university and college libraries, some special libraries and the 14 largest public libraries were present in the GGC. Many public library collections could not easily be found online. Bibliotheek.nl plans to load records from all public libraries and make them discoverable through WorldCat.org, along with the new Dutch National Library Catalogue (NBC). Through WorldCat.org, information seekers can find materials freely on the Web from over 10,000 WorldCat libraries worldwide. OCLC has existing agreements with sites like Google and Yahoo!, making it possible for library materials in WorldCat.org to be discovered by people who use these search engines to start their searches. WorldCat.org also offers its users a variety of social networking features. The Dutch National Library Catalogue is a freely accessible, national public catalogue that will include

the complete holdings of public libraries and the National Library of the Netherlands. Through NBC, end users who are library members can request titles that their library does not have through resource sharing services from OCLC. This agreement includes participation of all Dutch public libraries in the GGC. OCLC discovery and resource sharing services are included in the agreement. Before the end of the year, all public libraries will be in the NBC. Bibliotheek.nl and OCLC are working together to load the bibliographic and holdings data of the libraries in the GGC. The VOB (Dutch association of public libraries) and SIOB (Dutch coordinating institute for public libraries) were closely involved in the service agreement between Bibliotheek.nl and OCLC, which is a supplement to an existing agreement between OCLC and the GII Consortium (shared information infrastructure consortium). In the GII Consortium, scientific libraries, public libraries, and the national library work together to create one digital information infrastructure for all Dutch libraries.

### **CIPE Italian University Consortium to Add 11 Million Records to WorldCat**

OCLC and the CIPE consortium, which comprises 11 university libraries in northern and central Italy, have signed an agreement to load CIPE library records into WorldCat to increase visibility of these Italian collections, and enrich the world's largest resource for discovery of library materials. The CIPE consortium (Consorzio Interistituzionale per Progetti Elettronici – Interinstitutional Consortium for Electronic Projects) was founded in 2007 with the objective to promote national and international cooperation, research, standardization, training, and development of services for the consortium members aimed at library innovation and efficiencies of scale. Participating in CIPE are the Universities of Bologna, Florence, Genoa, Modena and Reggio Emilia, Padua, Parma, Pisa, Sassari, Siena, Venice, and the Polytechnic University of the Marche. Some items in these collections date back to the 15th century.

The records of the CIPE universities are in UNIMARC format and will first be converted by OCLC before batchloading is done for each university. Once the records are added to WorldCat, the consortium can take advantage of other OCLC services made available through WorldCat. The agreement between CIPE and OCLC was facilitated by Ifnet Srl, OCLC's distributor in Italy.

### **Discovery and Reference**

#### **OCLC Announces New Agreements with Publishers, Adds More to WorldCat Local**

OCLC has signed new agreements with leading publishers around the world and has added important new content and collections to WorldCat Local, the OCLC discovery and delivery service that offers users integrated access to more than 922 million items. WorldCat Local offers access to books, journals and databases from a variety of publishers and content providers from around the world; the digital collections of groups like HathiTrust and Google Books; open access materials, such as the OAster collection; and the collective resources of libraries worldwide through WorldCat. WorldCat Local is available as a stand-alone discovery and delivery service, and as part of OCLC WorldShare Management Services. Through WorldCat Local, users have access to more than 1,700 databases and collections, and more than 650 million articles. OCLC recently signed agreements with the following content providers



to add important new collections—including some searchable full text—to WorldCat Local, WorldCat.org, and OCLC WorldShare Management Services:

- **Alexander Street Press**, based in the United States, brings together the skills of traditional publishing, librarianship, and software development to create quality electronic collections. Alexander Street Press will provide metadata and full text to centrally index 30 databases through WorldCat Local, WorldCat.org, and OCLC WorldShare Management Services. A few of the databases included in the agreement are *American Song*, *Contemporary World Music*, and *Alexander Street Literature*.
- **Brepols Publishers**, based in Belgium, is an international academic publisher of works in the humanities. Brepols will be providing OCLC with books and journals, both metadata and full-text, for inclusion in WorldCat.org, WorldCat Local, and OCLC WorldShare Management Services.
- **Elsevier**, based in the Netherlands, a leading global provider of scientific, technical, and medical (STM) information products and services, will make the full text from Elsevier's SciVerse ScienceDirect journals and e-books available to users of OCLC's WorldCat Local and OCLC WorldShare Management Services. Metadata from the SciVerse ScienceDirect will also be exposed in WorldCat.org.
- **IOP Publishing**, based in the United Kingdom, provides publications through which leading-edge scientific research is distributed worldwide. IOP is part of the Institute of Physics, a leading scientific society promoting physics and bringing physicists together for the benefit of all. IOP will provide journal metadata to OCLC for inclusion into WorldCat Local, WorldCat.org, and OCLC WorldShare Management Services.
- **Nordic Council of Ministers (Norden)**, based in Denmark, is a collaboration of countries involving Denmark, Finland, Iceland, Norway, and Sweden as well as the three autonomous areas, the Faroe Islands, Greenland, and the Åland Islands. Norden will be providing metadata to OCLC for dictionaries, educational material, image databases, maps, and other online resources related to the Nordic Region and Nordic co-operation. This metadata will be included in WorldCat Local and OCLC WorldShare Management Services.
- **The Philosophy Documentation Center**, located in the United States, is a non-profit organization dedicated to providing affordable access to materials in applied ethics, classics, philosophy, and religious studies. Its E-Collection (including *POIESIS: Philosophy Online Serials*) contains journals, book series, conference proceedings, and other publications in applied ethics, philosophy, religious studies, and related disciplines. This collection includes titles produced in cooperation with professional associations, research centers, and publishers in several countries. The Philosophy Documentation Center is providing metadata and full text to OCLC for inclusion in WorldCat Local, WorldCat.org, and OCLC WorldShare Management Services.
- **Rock's Backpages**, based in the United Kingdom, is the ultimate archive of music journalism, which includes thousands of articles from Aaliyah to ZZ Top, by the finest rock writers of the last 50 years. Rock's Backpages will provide article level metadata to OCLC for inclusion into WorldCat Local and OCLC WorldShare Management Services. Free content will be made available through WorldCat.org.
- **Royal Society of Chemistry's RSC Publishing division**, based in the United Kingdom, provides a broad range of resources for the scientific community including Books/eBooks, databases, journals, and magazines. With a significant increase in international contributions (over 50% growth in journal articles in 2011), RSC Publishing offers high impact content (average Impact Factor of 5.4) in chemical sciences; energy and environmental sciences; food science; medicinal

chemistry and biomolecular sciences; and nano, polymers and materials science. RSC Publishing will be providing OCLC with eBook and journal article level metadata and full text for indexing purposes. The data will be included in all OCLC products and services including WorldCat, WorldCat.org, WorldCat Local, and OCLC WorldShare Management Services.

- **The Taylor & Francis Group**, based in the United Kingdom, partners with researchers, scholarly societies, universities, and libraries worldwide to bring knowledge to life. As one of the world's leading publishers of scholarly journals, books, ebooks, and reference works, Taylor & Francis content spans all areas of Humanities, Social Sciences, Science, and Technology. Taylor & Francis will be providing metadata for all of their journals and books. The data will be included in all OCLC products and services.
- **Sabinet**, based in South Africa, has been a leader in facilitating access to electronic information for more than 27 years. Sabinet has increased their partnership with OCLC to allow OCLC to centrally index their full text for the metadata currently in WorldCat Local for the SAE Publications.

New content recently added to the WorldCat Local central index includes: Berkeley Electronic Press; CAB eBooks; CAB Reviews; CAB Reviews Archive; IEEE, now with full text; IET Publications Database; Inspec; Marquis Who's Who; M.E. Sharpe eBooks; M.E. Sharpe Journals; Oxford Art Online; Oxford Music Online; Religious and Theological Abstracts; U. S. Law Reviews and Journals. Vendor record collections now available in the WorldCat Local central index and to WorldCat Local "quick start" libraries: HeinOnline American Law Institute Library, HeinOnline Bar Journals, OECD iLibrary. OCLC continues to negotiate access to critical library content on behalf of the cooperative to ensure access to libraries' most popular resources. A complete list of databases and collections available through WorldCat Local from these and other publishers is available online (<http://www.oclc.org/us/en/worldcatlocal/overview/content/dblist/default.htm>). For more information, visit the WorldCat Local website.

### **OCLC Completes Transfer of Licensed Databases to EBSCO Publishing**

OCLC has transferred to EBSCO Publishing (EBSCO) the rights to license publisher-owned databases that are currently available through the OCLC FirstSearch reference service. This transaction is intended to complete the cooperative's transition out of the role of content reseller. OCLC is focusing on management and access to libraries' full collections through the OCLC WorldShare Platform. In March 2010, EBSCO acquired the NetLibrary Division of OCLC as well as the rights to license a select number of publisher-owned databases available through FirstSearch. The current transaction completes the transfer of OCLC's rights to license publisher-owned databases on FirstSearch that began under the 2010 agreement. EBSCO has agreed to host, distribute, and support these licensed databases, and plans to load the databases and begin providing access to users on EBSCOhost. OCLC and EBSCO are working together to ensure a smooth transition for users, and uninterrupted service for customers. FirstSearch remains part of OCLC's discovery and delivery services. As these services become part of the OCLC WorldShare Platform, FirstSearch users will see improved integration and workflows. OCLC will continue to provide access to WorldCat and other databases published by OCLC, such as ArticleFirst, OCLC WorldCat Dissertations and Theses, SCIPHO, and Electronic Books. The OCLC WorldShare Platform is a global, interconnected Web architecture that supports OCLC's Webscale services and applications, and provides flexible, open access to library data through APIs and other Web services. Library service and

content providers, like EBSCO, can offer libraries access to their content and services through the OCLC WorldShare Platform. OCLC has agreed to assign to EBSCO the hosting contracts for the following databases: Anthropological Index; Anthropological Literature; Anthropology Plus; Avery Index to Architectural Periodicals; Chicano Database; FRANCIS; Heritage of the Printed Book (formerly Hand Press Book); History of Science, Technology, and Medicine; Index to 19th-Century American Art Periodicals; Russian Academy of Sciences Bibliographies. Offering these resources on EBSCOhost is in line with EBSCO's approach to making available the highest quality subject indexes. Customers of EBSCO Discovery Service (EDS) who subscribe to these databases on EBSCOhost will be able to leverage EBSCO's unique Platform Blending technology to infuse results from these databases into their EDS experience.

### **Resource Sharing and Delivery**

#### **Deadline Approaching for Required Upgrade to ILLiad Version 8.1 or 8.2**

OCLC and Atlas Systems continue to provide ongoing enhancements to the OCLC ILLiad Resource Sharing Management software to insure that ILLiad meets the changing needs of libraries. The latest version of ILLiad software is version 8.2. Using the latest development platforms and tools, ILLiad version 8.2 client performs faster and more efficiently than previous versions. ILLiad versions 8.1 and 8.2 are available to all ILLiad users at no additional charge. As part of the move to newer versions of ILLiad software, OCLC will discontinue support for ILLiad versions 8.0 and older on 2012 July 15. Learn more about migration options and the end of support for older versions of ILLiad at <http://www.oclc.org/us/en/illiad/support/migration/default.htm>. For assistance with your upgrade plans, contact OCLC Customer Support today at [support@oclc.org](mailto:support@oclc.org), 1-614-793-8682 or 1-800-848-5800. For self-hosted users of the ILLiad software, the hosted version of ILLiad allows for updates when you schedule them through an online scheduler. This eliminates the need to manage software version changes locally, resulting in significant time savings for your staff. If you choose to migrate your ILLiad server to OCLC hosting, your server can be upgraded to the latest version of ILLiad as part of that process. For more information or to request a quote for OCLC hosted ILLiad, contact Alisa Whitt at [whitta@oclc.org](mailto:whitta@oclc.org) or 1-800-848-5878 extension 4069.

#### **CALIS Joins OCLC Resource Sharing**

CALIS, the China Academic Library and Information System, joined OCLC's global resource sharing network effective 2012 March 1. This extends the possibilities for international resource sharing of academic library materials. The China Academic Library and Information System (CALIS) has loaded 500,000 monograph records into WorldCat that became accessible to WorldCat® Resource Sharing users on 2012 March 1. CALIS will loan book chapters and articles, but not physical books. The monograph records all contain the OCLC® symbol "CALIS" and are owned by academic members of the CALIS consortium. The records are for monographs published from 1987 to 2001 in the fields of philosophy, economics, science of law, education, literature, history, management, science, technology, agriculture, and medical sciences. Borrowing libraries should anticipate longer response time for fulfillment to allow CALIS to process requests. Normally, CALIS will process and fill a document delivery request for book chapters and articles within two to three business days. Guidelines for requesting CALIS items:

- The CALIS monograph records in WorldCat all contain the OCLC symbol "CALIS" and are owned by academic members of the CALIS consortium.
- All loan requests will go through CALIS, which will confirm ownership of requested items and coordinate fulfillment with the borrowing and lending libraries.
- Borrowing libraries should anticipate a response time of two to three business days for most document delivery requests for book chapters and articles.
- These documents can be conveniently delivered through OCLC's Article Exchange document-sharing site, which is accessible from within WorldCat Resource Sharing and an add-on to the ILLiad® Resource Sharing Management Software.

### **Management Services and Systems**

#### **OCLC Website for Small Libraries Project**

The Website for Small Libraries project, which began as an OCLC Innovation Lab experiment in 2011, is now available as a beta service for any library wishing to set up its own website. By participating in the project, libraries will be able to quickly and easily set up a website that provides basic functionality for making small collection information available on the Web, setting up users, checking materials in and out, placing holds, and providing library contact, location, service and event information. Four South Dakota libraries, as well as the South Dakota State Library, were part of the project's pilot. In order to make the site as easy to use as possible, the site relies on simple editing of predefined templates to populate the Web presence. It can take just a few minutes to have a library site up and available to patrons on the Web, as well as on mobile and tablet devices. The service uses a set of wizards to import collection and user information in a wide variety of formats. It uses statistical algorithms and WorldCat to determine structure and field contents to ease the import processes. Complexity is kept to a minimum by focusing on the minimum fields necessary to make collections accessible. This is not a full-featured library management service, but an option for those small libraries that have not been able to take advantage of traditional library systems due to size, cost or technological restrictions. Libraries interested in signing up can do so at <http://beta.worldcat.org/lib/>. Participation in the project costs \$500 per year and comes with a 90-day trial period. Libraries are free to import and export their collection and patron data as they try the service, as well as through the product life. State library organizations, consortia, and other library groups interested in group rates should contact their OCLC Library Services consultant.

#### **Relais International, OCLC to Share Data and Services from OCLC WorldShare**

Relais International, which provides systems to support interlibrary loan and document delivery services, has signed an agreement with OCLC that will allow mutual subscribers access to WorldCat data and OCLC services through the OCLC WorldShare Platform. Under this new partnership, Relais will use the WorldCat Search API so that library staff can search WorldCat from within Relais to retrieve holdings information. Relais will also use the WorldCat Resource Sharing API so that requests and updates can be sent to and received from the OCLC WorldCat Resource Sharing service. These options for access to OCLC will be available to Relais users whose institutional holdings are visible on WorldCat.org and who subscribe to the WorldCat Resource Sharing service. Libraries that qualify for keys to the APIs will be able to activate the services within Relais. This partnership is facilitated through the new OCLC

WorldShare Platform, which enables OCLC and library partners to configure and share a wide range of applications that deliver new functionality and value for libraries and their users. As an OCLC partner, Relais is considering using other APIs to gain access to the OCLC Policies Directory and the newly deployed Article Exchange document-sharing site.

### **Latest OCLC WorldShare Management Services Release Offers Enhancements**

The latest OCLC WorldShare Management Services release continues the steady and user-informed development approach demonstrated since release to early adopters in July 2010 and general availability in July 2011. In addition, enhancements to integrated OCLC services—such as WorldCat Local and the WorldCat knowledge base—also provide benefits to WMS users. True to the WorldShare global focus and commitment, an additional data center was opened for operation in Australia in March 2012 and WorldShare Management Services has new currency options for the Acquisitions workflow. Highlights of this comprehensive release:

- Provided at no additional charge to WMS users, support for the SIP2 protocol for self-check machines has been added.
- Consortial functionality in the WorldCat knowledge base is available so groups can share both collections and library holdings with all members.
- Content additions have been made to WorldCat Local – the single-search discovery and user interface for WorldShare Management Services. New agreements with leading publishers around the world have added important new content and collections to WorldCat Local. Users now have access to more than 1,700 databases and collections, and more than 650 million articles.
- Full-text searching of IEEE content through WorldCat Local follows the addition of full-text content from IEEE to the WorldCat Local central index. Also supported is full-text searching within the BioOne and Emerald collections and new content from additional sources will be added on an ongoing basis.

Coming soon will be the ability for libraries to grant specific patrons (e.g., subject matter selectors) the right to submit a list of titles via WorldCat Local for purchase consideration. The list creates a standard purchase order in WorldShare Acquisitions that can be approved and submitted according to library procedures. Many additional enhancements for Circulation, Acquisitions, and other functional areas are described in detail in the complete Release Notes on the User Support Center (<http://www.oclc.org/support/webscale>; login required). OCLC WorldShare Management Services provide libraries with a new approach to managing library services cooperatively, including integrated acquisitions, cataloging, circulation, resource sharing, license management, and patron administration, as well as a next-gen discovery tool for library users.

### **OCLC Research**

#### **Downloadable Version of FAST Now Available**

OCLC Research has made FAST (Faceted Application of Subject Terminology) available for bulk download, along with some minor improvements based on user feedback and routine updates. As with other FAST data, the bulk downloadable versions are available at no charge. FAST is an enumerative, faceted subject heading schema derived from the Library of Congress Subject Headings (LCSH). OCLC

made FAST available as Linked Open Data in December 2011. The bulk downloadable versions of FAST are offered at no charge. Like FAST content available through the FAST Experimental Linked Data Service, the downloadable versions of FAST are made available under the Open Data Commons Attribution (ODC-By) license. FAST may be downloaded in either SKOS/RDF format or MARC XML (Authorities format). Users may download the entire FAST file including all eight facets (Personal Names, Corporate Names, Event, Uniform Titles, Chronological, Topical, Geographic, Form/Genre) or choose to download individual facets (see the download information page for more details). OCLC has enhanced the VoID ("Vocabulary of Interlinked Datasets") dataset description for improved ease of processing of the license references. Several additions and changes to FAST headings have been made in the normal course of processing new and changed headings in LCSH. OCLC will continue to periodically update FAST based on new and changed headings in LCSH. See the FAST Dataset Download webpage at <http://www.oclc.org/research/activities/fast/download.htm>.

### **OCLC Research Launches ArchiveGrid Blog**

The ArchiveGrid Blog provides a place to highlight new ArchiveGrid collections and contributors, talk about how the new ArchiveGrid system is being built, and note things of general interest with an archives twist. The ArchiveGrid Blog is part of OCLC Research's beta ArchiveGrid discovery system, now freely available and providing access to primary source materials held in archives throughout the world. ArchiveGrid helps researchers contact archives to request information, arrange a visit, and order copies—all from one simple, intuitive search. The OCLC Research version of ArchiveGrid will eventually replace the existing ArchiveGrid subscription service. Anyone seeking historical collections can use ArchiveGrid's powerful search engine and user-friendly interface to retrieve results that include the title of the collection, holding institution, brief description, and a link to an extended description. And now anyone can learn more about ArchiveGrid or archives in general with the ArchiveGrid Blog. A link to the ArchiveGrid Blog is available on the ArchiveGrid homepage. Learn more about ArchiveGrid at <http://www.oclc.org/research/activities/archivegrid/default.htm>. Try the ArchiveGrid discovery interface at <http://beta.worldcat.org/archivegrid/>. Read or contribute to the ArchiveGrid Blog at <http://beta.worldcat.org/archivegrid/blog>.

### **Newly Published Report Highlights 2011 Work, Engagements of OCLC Research**

*OCLC Research: 2011 Activity Report* presents our work in a new context and provides an overview of recent accomplishments. The mission of OCLC Research is to expand knowledge that advances OCLC's public purposes of furthering access to the world's information and reducing library costs. We are one of the world's leading centers devoted exclusively to this type of work. Since 1978, we have carried out research and made technological advances that enhance the value of library services and improve the productivity of librarians and library users. To meet these goals, OCLC Research is organized around three roles:

- To act as a community resource for shared Research and Development (R&D).
- To provide advanced development and technical support within OCLC itself.
- To enhance OCLC's engagement with members and to mobilize the community around shared concerns.

This report pulls together our 2011 work in these three areas. For more information on *OCLC Research: 2011 Activity Report*, see

<http://www.oclc.org/research/publications/library/2012/2011activityreport-overview.htm>.

### ***Social Metadata for Libraries, Archives, and Museums Report Series Complete***

*Social Metadata for Libraries, Archives, and Museums, Part 3: Recommendations and Readings* completes the Social Metadata for Libraries, Archives, and Museums report series, and *Social Metadata for Libraries, Archives, and Museums: Executive Summary* provides a high-level overview of all three reports. In the first report, the 21-member Social Metadata Working Group reviewed 76 sites relevant to libraries, archives, and museums that supported such social media features as tagging, comments, reviews, images, videos, ratings, recommendations, lists, links to related articles, etc. The results from a survey of site managers conducted in October-November 2009 were included in the second report. *Social Metadata for Libraries, Archives and Museums, Part 3: Recommendations and Readings* provides recommendations on social metadata features most relevant to libraries, archives, and museums and an annotated reading list of the literature consulted during this research. *Social Metadata for Libraries, Archives and Museums: Executive Summary* provides a high-level overview of all three reports. The group's final recommendation is that it is riskier to do nothing and become irrelevant to our user communities than to start using social media features. Links to these two new reports as well as additional related resources may be found at <http://www.oclc.org/research/news/2012-04-23.htm>.

## OCLC QC TIP OF THE MONTH

**Submitted by Luanne Goodson**

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OCLC Quality Control Section

### OCLC Fixed Field and MARC Codes

The supporting documentation for filling out the OCLC Fixed Field in WorldCat bibliographic records can be found in OCLC's Bibliographic Formats and Standards (BFAS)

<http://www.oclc.org/bibformats/en/fixedfield/default.shtm>. Each element (which is actually an 008 field byte) is linked to BFAS. Simply click on the label and you will be taken to the appropriate BFAS page.

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

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

Romanian (rum) as opposed to Romany (rom)

Basque (baq) vs Basa (bas)

Mandarin (chi) vs Mandingo (man)

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

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



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