

# 2012

## OLAC NEWSLETTER



**Albuquerque International Balloon Fiesta**

Photo courtesy: Ron Behrmann

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## THE OLAC NEWSLETTER

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## TABLE OF CONTENTS

<b>OLAC Executive Board, 2012-2013</b>	<b>3</b>
<b>From the President</b>	<b>4</b>
<b>From the Editor</b>	<b>6</b>
<b>Treasurer's Report</b>	<b>7</b>
<b>OLAC Conference Preview</b>	<b>8</b>
<b>OLAC Meeting Minutes</b>	
<i>Executive Board</i>	<b>9</b>
<i>CAPC</i>	<b>11</b>
<i>Membership</i>	<b>15</b>
<b>Conference Reports</b>	
<i>MARBI</i>	<b>18</b>
<i>CC:DA</i>	<b>21</b>
<i>MOUG</i>	<b>24</b>
<b>Call for Candidates</b>	<b>25</b>
<b>News and Announcements</b>	<b>27</b>
<b>Reviews</b>	<b>30</b>
<b>OLAC Cataloger's Judgment</b>	<b>32</b>
<b>News from OCLC</b>	<b>35</b>
<b>OCLC QC Tip of the Month</b>	<b>47</b>

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## FROM THE PRESIDENT

**Heidi Frank**



It is with great excitement and humbleness that I have taken on the role as President of OLAC for the coming year. Although I have been a member of OLAC for many years, it has only recently been my pleasure to become so involved in the nuts and bolts of the organization. I have been extremely honored to have served last year as OLAC's Vice President, under the leadership of Amy Weiss, who has proven her commitment and dedication to OLAC. Thanks to Amy and the rest of the Board members for providing such great examples to follow. Additional thanks to Walt Walker, who will continue on as Chair of CAPC, as well as the other members and interns of CAPC for their dedicated work. I also welcome Liz Miller as the new Vice-President/President-Elect of OLAC, and Scott Dutkiewicz as the new Secretary. I look forward to working with them and the rest of the Board members in serving OLAC's mission. I also want to give appreciation to Marcia Barrett, our outgoing Secretary, who provided much support and advice in addition to her dependability and commitment as a member of the Board.

One big event on the horizon is the OLAC 2012 Biennial Conference to be held October 18th-21st in Albuquerque, New Mexico. With the theme of "Post-Modern Cataloging", OLAC's traditional and practical workshops on audiovisual and non-print cataloging will be intermixed with discussions on new standards and constructs, including FRBR and updates on RDA implementation. An engaging opening keynote is expected with speaker Eric Childress, who has been a long-standing pioneer of metadata-related technologies. If you arrive a week early, there is also the opportunity to experience Albuquerque's International Balloon Fiesta, scheduled the weekend prior to the conference. A special thanks goes to Rebecca Lubas and the Conference Program Planning Committee for organizing such an event. For more information, go to the conference website at: <http://olac2012.weebly.com/>

Although we've not yet experienced OLAC 2012 in beautiful Albuquerque, it is not too early to start thinking about the OLAC 2014 Conference! If you've had any interest in hosting an OLAC conference, the Board welcomes your invitation proposal, which must be submitted before ALA Midwinter 2013. More details on the process can be found in the OLAC Handbook at: <http://olacinc.org/drupal/?q=node/58#committeeformation>

Cataloging in all respects is in a state of change. With the ideas behind linked open data and next generation catalogs, audiovisual and non-print catalogers have the opportunity to be on the forefront with new technologies and metadata standards. OLAC has already been an integral part of this change in our involvement with RDA testing and providing examples relevant to audiovisual and non-print materials, as well as through all the OLAC members who are incorporating these new ideas into their

everyday work and projects. I feel one way we will expand our visibility as a leading organization in these areas is by continuing to create training guides and best practices that deal with these changes in standards as they relate to our specific materials. CAPC has been very active in organizing task groups to handle these projects, and provides numerous opportunities for OLAC members to serve and participate in many capacities within the organization. The outcomes of OLAC's initiatives prove beneficial to us all, so I greatly encourage and welcome active membership in these exciting endeavors! Feel free to contact me ([hf36@nyu.edu](mailto:hf36@nyu.edu)) or any of OLAC's Executive Board members with any questions, concerns, or suggestions you may have about OLAC.

## FROM THE EDITOR

**Marcy Strong**



As the OLAC Newsletter is issued quarterly, I always have the opportunity to frame my column around the changing of seasons. Fall is my favorite time of the year and I'm especially excited this year because I get to spend some of those days in Albuquerque, New Mexico, at the upcoming OLAC conference. The scenic locale offers hot air balloons, gorgeous mountains, flavorful food, and this year, audiovisual cataloging! Be sure to check out the OLAC Conference Preview on p. 8 of this issue and get your registration in soon – deadlines are approaching!

Fall may also be the best time of the year to get involved with OLAC. As you read through this issue, you'll notice the many opportunities to give back to the organization you love. There is a call for candidates for the offices of Vice President/President Elect and Treasurer (p. 25-26), as well as positions that are open on CAPC (p. 26). Are you planning to attend the OLAC Conference in October? Consider volunteering to be a conference reporter for one of the workshops (p. 27). Or perhaps you think your city would make a great host for the 2014 conference? We're already accepting proposals (p. 28). OLAC is a warm and welcoming place and I would encourage you to consider the above opportunities and get involved.

This issue also includes meeting minutes and reports from the recent ALA Annual Conference in Anaheim. Marcia Barrett, in her last report as Secretary, has provided minutes from the OLAC Executive Board (p. 9), CAPC (p. 11) and Membership (p. 15) meetings. You'll also find reports from MARBI (p. 18), CC:DA (p. 21) and MOUG (p. 24). I hope you have the chance to read through some of these reports and see the worthwhile projects your colleagues are hard at work on. Finally, I'd like to offer congratulations to Bobby Bothmann for winning the 2012 Nancy B. Olson award and Tricia Mackenzie for winning the OLAC Conference scholarship award.

I hope to see many of you in Albuquerque next month!

## TREASURER'S REPORT

4th Quarter FY12

April 1 – June 30, 2012

Bruce J. Evans



	4th quarter	FY-to-Date
<b>Opening Balance</b>	12,674.28*	\$ 12,674.28
<b>Income</b>		
Memberships	\$ 1,277.00	\$ 6,349.25
Other Inc.		\$ 0.17
Total		\$ 6,349.42
<b>Expenses</b>		
Board dinner	\$ 196.80	\$ 628.56
Newsletter production		\$ 100.00
ALA Affiliate Membership Renewal		\$ 150.00
ALA Stipend	\$ 900.00	\$ 2,000.00
ALA Room Fee (2 @ 70 each)	\$ 140.00	\$ 260.00
ALA Membership Meeting A/V costs	\$ 812.50	\$ 812.50
Website administration		\$ 200.00
Katie Eller (OLAC Book Rev.) reimb.		\$ 26.49
Supplies		\$ 20.00
Check supplies		\$ 13.97
Bank Charge		\$ 40.00
Nancy B. Olson Award Plaque	\$ 238.90	\$ 238.90
OLAC Conference		\$ 100.00
PayPal Fee	\$ 31.13	\$ 138.20
Postage		\$ 8.80
OLAC 2010 speaker reimbursement		\$ 670.00
Total Expenses	<u>\$ 2,319.33</u>	<u>\$ 5,407.42</u>
<b>Closing Balance</b>		\$11,631.95
Personal Membership	243	
Institutional Membership	11	As of June 30,
<b>Total</b>	254	2012

\*In the June, 2012 issue of the Newsletter, I reported our closing balance as \$14,273.27. In the current report, I have our opening balance as \$12,674.28. Those figures should actually be the same. The opening balance reported in this report is correct. I attribute the error with the closing balance reported in the previous Newsletter to not double-checking the figures on the report against our budgeting tool and online banking statement, which would have prompted me to look more closely at the figures in the report. I have done so with the current report, and will attest to its accuracy. I sincerely regret the error.



## OLAC CONFERENCE PREVIEW

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



OLAC 2012 is approaching! Remember, the deadline for best consideration for workshop assignments is September 15! Workshops include topics like Constructing Headings in RDA, FRBR for Film and Video, Cataloging Digital Images and many more. To see a full list of the workshops, visit <http://olac2012.weebly.com/workshops.html>

As of the end of August we have more than 100 registrations, so if you haven't made your plans...don't delay!

Have you seen the first-ever OLAC Conference t-shirt? Check it out at <http://tinyurl.com/bvvmolt>. You can order your t-shirt when you register for only \$15! Sales support the Conference and OLAC!!

Visit the OLAC 2012 website for more conference details: <http://olac2012.weebly.com/>



**Mexican Ballet Folklorico Dancers**  
<http://www.itsatrip.org>

## MEETING MINUTES

Marcia Barrett



### OLAC Executive Board Meeting ALA Annual Conference Anaheim, California June 24, 2012

#### Present

Amy Weiss, Sevim McCutcheon, Heidi Frank, Marcia Barrett, Marcy Strong, Jay Weitz, Leanne Hillery

#### Website Organization (S. McCutcheon)

Members of the Website Steering Committee are John Baga, Tricia Mackenzie, Amy Pennington, and Debbie Benrubi. Amy is cycling off the committee, so there is a need for one new member. The others have agreed to another two-year term.

The committee wants to substantially change the look and feel of the website. The committee members read articles, and Sevim read the book *Don't Make Me Think* and summarized for the other committee members. The premise of the book is that you don't want users to have to think about how to navigate a website. Debbie Benrubi is in charge of getting a logo, and it's not quite ready for review.

Sevim distributed drafts of the suggested changes and ideas. Recommended changes are prominent "Contact us," "Join OLAC," and search buttons as well as a new color. They worked from a short list of available themes and chose the Tapestry theme. It's crisp, clear, simple and provides good contrast. They're focused on aesthetics and functionality. The committee wants to organize resources by format – some are outdated, but it's beyond the scope of the committee to update content. John reviewed the OLAC website and identified content in need of revision. That will be useful for the next phase. There is some overlap between Cataloging Resources and OLAC Publications. We agreed to limit resources/publications to those OLAC has some hand in. There was a suggestion to expand the CAPC page, posting conference meeting agendas and minutes.

A concern is that more help is needed to keep up with web content. The webmaster position has never been a board position, but we need to consider changing this. It's clear that we will be continuing to revise the website, so the Website Committee will function as a standing committee. Heidi will invite Teresa to the Executive Board meeting, and Amy will ask Teresa if she wants an assistant to help with updating web content. It would be ideal if that person is a member of the Website Committee and has Drupal skills.

### **Notifying Members of Membership Expiration (A. Weiss for B. Evans)**

Bruce finds the software for this very cumbersome. This was chosen quite some time ago, and the Board agreed that it would be good to look into replacing this. It doesn't seem to be working. The Board recommends a search for new membership software and agreed that we should post a generic email reminder to OLAC-L about renewing membership.

### **Publicity, Pamphlet, Facebook presence (Heidi, Amy, Leanne)**

We need publicity materials to distribute that don't have an address that expires and will direct people to our website. Amy picked up promotional materials from other ALA Affiliates. We need to get something designed and priced in a timely manner. Leanne works with someone who is a graphic artist and will try to have something ready by Midwinter. Leanne will work on getting a new logo.

We plan to build a Facebook page so that updates that will show in the newsfeed. Heidi will get started with this and work with Leanne.

Amy will put out a call for volunteers for the 2014 conference location. We want to have publicity materials for the OLAC 2014 conference to hand out at preceding ALA conferences. Leanne offered to look into putting in a proposal for hosting in Norfolk, Virginia and Heidi for hosting in New York City.

### **Conference Scholarship Committee (S. McCutcheon)**

Sevim, Nerissa Lindsey and Christina Hennessey are members of the committee. Both Nerissa and Christina were recipients of the 2010 OLAC Scholarship. We have five strong applicants at this point. Amy will send Annie Glerum's contact information to Sevim for the Election Committee next year.

### **Major Handbook Revisions (A. Weiss)**

We've made updates to the handbook, but Amy thinks it's time for a thorough review and revision. Updating will probably be an ongoing issue. She suggested appointing a committee to help. Heidi will talk to Scott after the conference about this. We'll ask Scott to make a call for volunteers for the committee.

### **Elections (S. McCutcheon)**

Sevim will chair the Elections Committee. We will elect a vice-president/president elect and treasurer. Liz Miller is current vice president, Scott Dutkiewicz is secretary, and Bruce Evans is treasurer. There is nothing in the handbook about term limits, and the board agreed that particularly for the position of treasurer, it's beneficial to the organization to have some continuing expertise.

**OLAC/Cataloging Policy Committee (CAPC)**  
**ALA Annual Meeting Minutes**  
**Friday, June 22, 2012**

**1. Present**

Members: Walt Walker (chair), Loyola Marymount University; Cyrus Ford, University of Nevada, Las Vegas; Diane Robson, University of North Texas; Katia Strieck, University of Pennsylvania; Stacie Traill, University of Minnesota; Mary Huismann, University of Minnesota

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

Visitors: Marcia Barrett, University of Alabama; Bruce Evans, Baylor University; Kathy Glennan, University of Maryland; Damian Iseminger, New England Conservatory; Teri Frick, Orange County Public Library, Virginia; Julie Moore, California State University, Fresno; Lloyd Chittenden, Fort Lewis College; Shi Deng, University of California, San Diego; Carolyn Walden, University of Alabama at Birmingham; Marilyn McCroskey, Missouri State University; Bryan Baldus, Quality Books, Inc.; Kevin Furniss, Tulane University; Stephen Hearn, University of Minnesota; Nancy Hunter, Colorado State University; Felicity Dykas, University of Missouri; Andrea Leigh, Library of Congress Packard Campus for Audio Visual Conservation; John Attig, Pennsylvania State University; Heidi Frank, New York University; Kate Leigh, Ball State University; Richard N. Leigh, Ball State University; Karen Sigler, Texas State University–San Marcos.

**2. Approval of minutes:**

The minutes of the Midwinter meeting were approved as written.

**3. Announcements:**

Walt Walker thanked William Anderson for his service on CAPC this conference and welcomed Beth Cox and Annie Glerum who are new interns.

**4. Reports and Discussions, Part 1:**

- a. CC:DA Report (K. McGrath)**  
See the CC:DA Report on p. 21.
- b. MARBI Report (C. Gerhart)**  
See the MARBI Report on p. 18.

**c. Video Game Genres (C. Gerhart)**

Cate put out a call for volunteers to work on genre headings for video games. The group will research if video games have genres, determine whether Library of Congress Genre Form Terms are applicable, and evaluate applicable current LCSH terms before determining if there are genres that need to be created.

Andrea Leigh's staff has already polled expert communities. LC is looking for a well-researched, substantive report. CAPC voted in favor of making this group a CAPC Task Force, and Cate will chair.

**d. LC Report (J. Young)**

PCC has put RDA training documentation on the Catalogers Learning Workshop website. LC Policy Statements are now called PCC Policy Statements to reflect the fact that they represent a collaborate statement of LC and PCC. LC is changing their policy on orphan headings, subject headings with no broader heading. These don't work well in the Semantic Web. LC will begin an experiment to add subject category codes (MARC 21 tag 072) to authority records for subject headings. The 072 field will contain Subject Headings Manual instruction sheet numbers for free-floating and pattern lists of subdivisions.

LC has cancelled about 100 genre/form terms . Character and franchise-based terms were cancelled in February and all terms specific to a sport were cancelled in June. There is a discussion paper on the appropriate genre/form treatment for globes, and LC is accepting comments through July 31.

LC, in cooperation with the ALCTS/SAC Subcommittee on Genre/Form Implementation (SGFI), has begun a literature project. The two groups have also undertaken a general genre/form terms project. LC continues to work with MLA on music terms.

**e. LC Motion Picture, Broadcasting, and Recorded Sound Division [MBRS] Report (A. Leigh)**

Andrea gave an overview of LC's Packard Campus for Audio-Visual Conservation, located in Culpepper, Virginia. The facility is intended for the acquisition, preservation, and storage of films, television programs, radio broadcasts, and sound recordings. It is designed to be a "digital factory." Andrea is dealing with born digital direct deposit. The moving image and recorded sound sections receive a lot of unique materials (home movies, poetry readings, etc.), much of which lacks information and requires research. They are moving toward using archival standards for these non-published works which involves training for staff. They are not on schedule with the rest of LC for implementing RDA for descriptive cataloging.

**f. RDA Revision Proposals Task Force (S. Traill)**

The task force has a list and has engaged in a lot of discussion about what to address, which issues should see RDA revision and which should be handled through best practices. Kelley McGrath has reviewed the list and made suggestions for things to fast track before RDA implementation. John Attig indicated that proposals that are already on the table will probably be released in the March/April 2013 Toolkit. Any proposal not currently on the CC:DA agenda will not be published until the following year. The task force will review the list one more time before forwarding to CAPC.

**g. DVD/Blu-ray Disc RDA Guide Task Force (D. Robson)**

The group has a rough draft in process. All of the areas from the first DVD section of the original document have been rewritten using RDA. They are still in the process of fixing terminology to more accurately fit RDA, discussing what information is needed in comparing RDA and AACR2, and what types of examples would be best.

They are also still debating the extent of the document and what is needed by catalogers switching over to RDA. Is information about FRBR and WEMI needed? What needs to be included about linked data? The group will be discussing these topics over the next few months and hopes to have a completed document for review by CAPC and perhaps a wider audience by Midwinter 2013.

**5. Presentation on FRBR and Facets for Improving Access to Moving Images (K. McGrath)**

Kelley gave a presentation, "Finding Movies with FRBR & Facets." She pointed out that users are looking for movies (moving image works), but libraries catalog publications. Catalog records may or may not have a uniform title, and most information in the record is related to the publication. Users care about versions, and the project that Kelley has worked on allows users to browse by facet. The project involves developing an end-user interface to take advantage of FRBR and facets. They have been experimenting with XC Metadata Services Toolkit to extract data from MARC bibliographic records and plan to use that information to create records by primarily automated means. Kelley discussed some of the challenges encountered and made the point that it would be very helpful to have movie data in a centralized database and use that to pre-populate records for manifestations. She is working on tools, forms, and documentation for ongoing metadata creation and maintenance.

**6. Reports and Discussions, Part 2:**

**h. Video Language Coding Best Practices Task Force (K. McGrath)**

The task force needs additional help. Walt will put out a call for another volunteer.

**i. Subcommittee on Maintenance for CAPC Resources [SMaCR] (R. Leigh)**

Six resources are scheduled to be reviewed in 2012. Some resources may also be reviewed sooner than scheduled, if they are significantly impacted by RDA. CAPC resources are reviewed at least once every 5 years. No resources were reviewed in the first half of 2012.

Only one resource was substantially updated in the first half of 2012. Updates usually occur after the review process, so this is as it should be. Two resources have been moved into the Archived Publications and Training Materials section in the past six months. Resource creators are always consulted before their resources are archived.

Several resources have also been added to the Cataloging Tools and Training Documents & Reports and Thought Papers sections. Those documents were formerly available only on the individual task force pages, making them difficult to locate. A spreadsheet with information about the content and organization of the CAPC section of the OLAC website has been updated to reflect changes to the CAPC website that were made in the first half of 2012. Most of those changes involved the addition of two new active task forces, the updating of hyperlinks, and the reclassification of documents. A list of necessary and requested changes has been sent to OLAC Webmistress Tereasa Keenan, with the Chair of CAPC being copied.

The last six months of 2012 look to be a busy time for SMaCR. The subcommittee hopes to add dates of the last revision to every web page, to verify the information on active task force pages with the chairs, and to come up with “final” wording for the past task force pages with the chairs. SMaCR also hopes to revise its own internal documentation, and to add at least one new member.

**j. Audiovisual Materials Glossary Update Task Force (K. Strieck)**

Carolyn Walden has completed the introduction, and old terms have been updated. Katia and Karen Sigler are working on 116 new terms. New volunteers are needed to help with this. Heidi is working on the web interface so others will be able to add terms.

**New Business**

**Streaming Media/Video Task Force (W. Walker)**

There is a new task force to create a guide for cataloging streaming media for RDA.

Jeanette Ho chaired the task force for streaming media and is willing to be on the new RDA task force. Becky Culbertson, Stacie Traill and Annie Glerum have also volunteered. Walt will ask for more volunteers. The group hopes to complete their work by Annual 2013.

**OLAC Membership Meeting  
ALA Annual  
Sunday, June 24, 2012**

**Present (26)**

Tricia Mackenzie, George Mason University; Tassanee Chitcharoen, Colorado State University; Marcy Strong, University of Rochester; Leanne Hillery, Old Dominion University; Scott Piepenburg, University of Wisconsin – Stevens Points; Kelley McGrath, University of Oregon; Walter Walker, Loyola Marymount University; Richard N. Leigh, Ball State University; Tammy Wong, Library of Congress; Min Zhang, Library of Congress; Sevim McCutcheon, Kent State University; Rebecca Lubas, University of New Mexico; Amy Weiss, Florida State University; Jay Weitz, OCLC; Paige Andrew, Pennsylvania State University; Heidi Frank, New York University; Keiko Okuhara, University of Hawaii; Faye Leibowitz, University of Pittsburgh; Kevin Furniss, Tulane University; Joanna Fountain, San Jose State University SLIS; Cheryl Tarsala, The Feral Cataloger; Bobby Bothmann, Minnesota State University, Mankato; Kent Boese, Wiley Rein LLP; Kathleen Ashe, Southwest Minnesota State University; Heather Pretty, Memorial University of Newfoundland; Katharine D. Leigh, Ball State University

**Presentation of the Nancy B. Olson Award (S. McCutcheon)**



Sevim McCutcheon presented the Nancy B. Olson award to Bobby Bothmann.

Photo courtesy: Rebecca Lubas



## Presentations

The membership meeting featured speakers in a lightning round format. Heidi Frank introduced the speakers and noted that the overarching theme of submissions was RDA. There were three presentations:

1. Paige Andrews, *RDA and Cartographic Materials*

Paige shared several overarching AACR2 vs. RDA descriptive differences as they relate to cartographic materials particularly, but across all resource descriptions generally. This “big picture” view of past and present/future cataloging standards was aimed at helping gain perspective on macro-level changes.

2. Rebecca Lubas, *Faraway So Close: Cataloging Encounters at the National and University Library of Kosovo*

While in the process of post war recovery and the challenges of building a new democracy, catalogers at the National and University Library of Kosovo face the same issues that their counterparts all over the world face – the challenge of creating quality, consistent data in the face of constant change.

Rebecca described the context of the library setting and how the Kosovo catalogers strive to answer the same questions about cataloging during the advent of RDA.

3. Scott Piepenburg, *RDA Trials*

Dallas Independent School District wanted to conduct a real-world test of RDA concepts prior to its formal roll-out. While not part of the formal testing project, with a volume of over 2,000 items per week in all formats, they felt they could do a reasonably comprehensive test of implementing RDA concepts. The process included the preparation of training materials, instruction, and policies for new and updated items. They did not use an “RDA compliant” ILS but cataloged to the limits and extent of RDA/MARC. The results of the test were interesting, notably in how quickly staff transitioned between the two and how users embraced the increased access offered to them.

## Business Meeting

### Treasurer’s Report (A. Weiss for B. Evans)

OLAC has 231 personal membership and nine institutional memberships. The balance in our checking account is \$12,662. Membership is increasing.

### **Newsletter Editor's Report (M. Strong)**

The most recent issue went out on OLAC-L, hoping to reach more people.

### **Conference Report (R. Lubas)**

Registration opened on June 1, and there has been good response. The map pre-conference sold out within the first few days. Currently, we're approximately one third under our break-even point. All the workshop leaders are set, and scholarship applications close on Friday. There will be a call for poster sessions soon. There's a Facebook page that features a workshop speaker every week or so. People are responding to that. If you're on Facebook, be sure to like the Conference page.

### **OCLC Update (J. Weitz)**

OCLC implemented MARC 21 updates 13 & 14 which include new fields and new subfields in existing fields, many of which are related to RDA. One of the notable additions is field 264 for production, publication, distribution, manufacture, and copyright notice. In March, OCLC introduced Connexion Client 2.40. Jay encouraged everyone to download this if you haven't yet done so because earlier versions will not be supported after October. The new client includes RDA workforms and RDA Toolkit IP authentication. It will correctly populate search results for place of publication and publisher for records that have the 264 field. Earlier versions of Client will not recognize this field. There are changes to drop-down lists, and as of February, changes to the controlled headings function. Troubles with controlling music uniform titles have been fixed.

### **Other**

Everyone liked the new format for the membership meeting. It was suggested that we promote the presentations as early as possible since everyone has a busy conference schedule.

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

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

**2012 ALA Annual Conference**  
Anaheim, California

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

submitted by Cate Gerhart  
University of Washington Libraries

This report provides information of interest to the OLAC constituency from the June 2012 MARBI meetings in Anaheim, California. A complete list of topics discussed can be found at:

<http://www.loc.gov/marc/marbi/>

In addition to the proposals and discussion papers below, the main topic of discussion was the demise of the MARBI committee. The MARC Advisory Committee (MAC) will continue to work with Library of Congress on MARC format issues but there will be no voting members representing the three ALA Divisions as there has been in the past. Obviously some changes will need to be made concerning how the MAC will proceed with their business without the ALA umbrella but that will be discussed later. Sally McCallum at the Library of Congress indicated that she hopes that MAC will continue to be involved in the development of MARC and non-MARC standards and she sees lots of work for MAC to do in the next few years. MARBI officially disbands after ALA Annual 2013.

**Proposal No. 2012-02: Identifying titles related to the entity represented by the Authority Record in the MARC 21 Authority Format.**

Based on a discussion paper from Midwinter, this proposal suggested adding a field 672 to the Authority format to make it possible for a computer to identify whether a particular creator is the same as in an authority record. In an undifferentiated heading it requires systems to not reorder headings. There were enough issues with the proposal that it was decided to vote it down and to bring a new proposal back at Midwinter. The Committee preferred the simple coding over the rich coding for the new proposal.

**Proposal No. 2012-04: New data elements in the MARC 21 Authority Format for *Other designation associated with the person and Title of the person.***

This proposal redefines field 368 in the Authority Format so that it includes attributes of a person (saint, title, etc.) in addition to corporate body. Option 2 of this proposal was approved redefining the field,

adding \$d (Title of the person) and broadening \$c. In addition to the changes in Option 2, the Committee added subfield \$s (Start period) and \$t (End period) so that if the attribute was time sensitive that information could be added. Also, \$u (Uniform Resource Identifier) and \$v (Source on information) was added for documenting where the information comes from.

#### **Proposal No. 2012-05: Making the 250 field repeatable in the MARC 21 Bibliographic Format**

This proposal would have made 250 repeatable to address the display problems created by the increased use of the field in RDA, specifically for musical scores. However, there were a number of issues that could not be resolved by the Committee so it was decided to vote down the proposal and have it come back at ALA Annual after some more discussion occurs in the music cataloging community.

#### **Proposal No. 2012-06: Defining subfield \$c (Qualifying information) in Field 028 (Publisher number) in the MARC 21 Bibliographic Format**

Many catalogers will be glad to know that this proposal passed and that there will be a place for qualifiers in the 028 field. In the proposal \$c was suggested but the Committee decided that \$q was a better subfield to use, so \$q will be used for qualifying the number in the 028. Remember that OCLC must implement the new subfield before it can be used, so resist the urge to start using it right now.

#### **Proposal No. 2012-07: Defining new code for vocal score in field 008/20 (Format of music) in the MARC 21 Bibliographic format**

This proposal suggests adding a new value to 008/20 (format of music) for the RDA defined “vocal score” that can include accompaniment or no accompaniment. RDA developers would like to discourage the use of codes “c” and “d” for RDA cataloging and would use this new code instead. This proposal was approved, adding a new code “k” for vocal score and redefining value “c” and “d” with narrower definitions and an indication to prefer “k” for RDA cataloging.

#### **Discussion Paper No. 2012-DP-02: Authority records for medium of performance vocabulary for music in the MARC 21 Authority format**

This discussion paper continues the discussion of how to implement the new music genre terms in MARC. The members moved closer to deciding where this information will go, narrowing it down to the 142 field or somewhere in the 16X block. There was also general agreement that one term will go in each authority record but that when applied in the bibliographic record multiple terms could go in one field as long as they are from the same thesaurus. This topic will likely come back as a proposal at ALA Midwinter.

**Discussion Paper No. 2012-DP-03: Chronological aspects in the MARC 21 Bibliographic and Authority formats**

The Library of Congress continues to implement genre headings for more different types of materials. Currently they are working on literature and music, both of which depend on chronological subdivisions in their headings. This information does not meet the definition of genre so it will not have a place in the new genre headings. However, the information continues to be important so a place for it needs to be found. This discussion paper explores places where this information could go in the two formats. Many options were discussed, too many to discuss here but, for more information see the web address at the top of this report. There was agreement that this information if needed so more discussion will occur and at some point, maybe Midwinter, a decision will be reached about how to go about getting this information into the records in a useable fashion.

**Discussion Paper No. 2012-DP-04: Recording audience characteristics of works and expressions in the MARC 21 Bibliographic and Authority formats.**

Like the previous discussion paper 03, this one has to do with information that will be lost from subject headings when they become genres. There was general consensus that the 3XX block would be a good place to put this kind of information. Again many options were discussed so see the full discussion on the website above. There will be a proposal coming in the future.

**Discussion Paper No. 2012-DP-05: Recording creator/contributor group categorizations of works, expressions, and persons in the MARC 21 Bibliographic and Authority formats**

Like the previous two proposals this is how to deal with information that does not fit the genre definitions and will need to go somewhere else when genre is implemented. There was again agreement that the 3XX block would be a good place for this information. This will likely come back as a proposal in the future.

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

submitted by Kelley McGrath  
University of Oregon Libraries

CC:DA has been busy preparing proposals for changes to RDA for discussion at the JSC's November meeting. Changes approved at this meeting will be the last ones with a chance to be incorporated into RDA before the March 2013 implementation date. All the proposals that the JSC will discuss are listed at <http://www.rda-jsc.org/workingnew.html>. CC:DA is now beginning the process of reviewing and responding to the proposals submitted by the other constituencies.

**Encoding Formats for Digital Video**

OLAC submitted one proposal to clean up some issues related to encoding formats for digital video (<http://www.rda-jsc.org/docs/6JSC-ALA-16.pdf>). We chose this as a change that is relatively straightforward to fix and likely to be non-controversial. Most of our suggestions are just tidying up. This includes things like correcting the spelling of Blu-Ray to Blu-ray and clarifying that "Blu-ray video" doesn't refer to just any video content on Blu-ray Disc, but should be more narrowly applied only to video content encoded to be used with standard Blu-ray players. We proposed adding one new term for flash video, which is a major means of delivering video content over the Internet.

We also addressed one more difficult issue. The current list of digital video encoding formats includes "DVD-R." However, DVD-R is not a video encoding format, but rather a type of disc. Although it is recorded in the system requirements note in AACR2 along with real video encoding formats, it should be removed from RDA's list of video encoding formats. However, we still wanted to retain the term in RDA since it is important to users in some contexts. Some DVD players and drives, especially older models, will not read some or all DVD-R or other recordable DVD discs. Therefore, it is important to warn users if an optical disc is recordable since they may experience problems using such discs. In practice this note is most likely to be used by circulation and public services staff to troubleshoot when a patron reports a problem using a disc.

In order to account for DVD-R we proposed the addition of two new elements related to optical discs. One is for the basic type of disc, such as CD, DVD or Blu-ray. The second is for the method of recording data on the disc. We suggested two basic categories of recording methods: (1) replicated (also known as prerecorded, stamped or pressed) and (2) recordable (also known as burned or duplicated). We decided it was not important to distinguish once-recordable from re-recordable discs since our goal is merely to warn users of potential problems. Plus re-recordable discs are likely to play a very minor role in library collections. We also proposed a subcategory for the specific type of recordable disc, such as DVD-R or DVD+R, if it is known and considered important.

The main challenge in crafting this proposal was deciding on terminology. Although the content of the categories is clearly defined, there seems to be no widely-used, standardized names for them. In one case, we chose the disc manufacturing industry's term (replicated). This seems less likely to be confusing than the term used when marketing discs to consumers (prerecorded), since all discs acquired for library collections presumably already have content recorded on them. For the second category, we chose the term that is used when selling discs to consumers (recordable). We proposed cross-references for all the other commonly-used alternatives we could identify.

## Music-Related Proposals

The Music Library Association put forth five proposals addressing some issues with music cataloging.

1. Revision of RDA 6.28.1.9, Additions to access points representing musical works with titles that are not distinctive: <http://www.rda-jsc.org/docs/6JSC-ALA-8.pdf>. This proposal suggests continuing the AACR2 practice of recording key in these access points when applicable and not just when needed to break a conflict.
2. Revision of RDA 2.11.1.3 (Recording Copyright Dates): <http://www.rda-jsc.org/docs/6JSC-ALA-11.pdf>. This proposal instructs catalogers to record the phonogram date for audio recordings even when the copyright date for textual material is later.
3. Revision of RDA 6.15.1.3 (Recording Medium of Performance): <http://www.rda-jsc.org/docs/6JSC-ALA-12.pdf>. This proposal suggests an alternative instruction to allow catalogers to record medium of performance using a vocabulary from outside of RDA in order to create statements that would be optimized for computer access and retrieval.
4. Revision of RDA instructions relating to librettos and lyrics for musical works (RDA 6.2.2.10.2, 6.27.4.2, Appendix I.2.1, and Glossary): <http://www.rda-jsc.org/docs/6JSC-ALA-13.pdf>. This proposal relates to access points for musical works where the text might be issued separately, such as operas and librettos. This is the only MLA proposal that generated controversy. The area of disagreement centered on how to handle text for musical works when the composer and the librettist are the same person. CC:DA settled on a recommendation to treat the libretto and the opera as two separate works, which will change some existing access points.
5. Revision of RDA instructions for arrangements and adaptations of musical works (RDA 6.28.1.5.2 and 6.28.3.2.2): <http://www.rda-jsc.org/docs/6JSC-ALA-14.pdf>. This proposal suggests the addition of examples to clarify the distinction between arrangements and adaptations for traditional or folk music of unknown authorship.

Another proposal that OLAC members may be interested in is the revision of RDA 2.5.1.4, which is related to recording edition statements (<http://www.rda-jsc.org/docs/6JSC-ALA-10.pdf>). This proposal reinstates the AACR2 rule allowing catalogers to supply an edition statement. In particular, this will help distinguish versions of a resource issued with the same title and in the same year but without an explicit edition statement.

## Preferred Sources of Information and Bases for Identification

I am a member of CC:DA's task force on sources of information, which is working on a number of issues of interest to media catalogers. The problems we are discussing are complicated and, although we have made progress, still unresolved. To quickly summarize the issues we were asked to address:

1. Make it clearer that publisher-issued containers and accompanying material count as part of the resource when determining the preferred source of information for comprehensive descriptions
2. Retain the preference in AACR2 for collective titles over non-collective ones for audio recordings and other materials (a parallel rule was also found in the chapter on graphic materials) even when the source with the non-collective title comes first in the hierarchy of possible preferred sources of information. This is especially an issue for music CDs.
3. Prefer the title on the title frames of the main film (e.g., a feature film) over other title frames (e.g., featurettes, deleted scenes) on a typical DVD. AACR2 1.1G1 allowed us to do this, but there is no parallel instruction in RDA.
4. Address the placement of embedded metadata in the hierarchy of preferred sources for moving image materials and other resources. The current scheme forces catalogers to prefer a title in an HTML title tag over one that displays to the end user on a web page and to prefer embedded metadata on a CD or DVD over a container or accompanying material.
5. Resolve problems with the categories and decision-making process for the basis for identification for comprehensive descriptions of resources issued in more than one part (RDA 2.1.2.3). The existing categories are not mutually exclusive and in some cases are difficult or impossible to parse for a sensible meaning.

Issue 1 was relatively straightforward and we have put forth a proposal to clarify this issue. We also suggested clarifying in the instruction for books, sheets and similar materials that only covers issued with the resource should be considered a source forming part of the resource. This is particularly important for early printed materials, which were often issued unbound and bound by the purchaser.

The other issues are more complex. It is very difficult to write instructions that are generalized and yet work well for all types of materials. Although AACR2 may have been based more on case law in this area, it did a better job of honoring the different bibliographic traditions and conventions around different types of materials. The task force was unable to craft proposals that we thought satisfactorily resolved the issues in a theoretically sound way that is also amenable to practical application. However, because these issues are so important for many materials and so central to the cataloging process, we decided to draft interim proposals. Although not watertight, these are better than the existing instructions and will enable catalogers to more effectively apply RDA to a variety of materials. These proposals are:

1. Proposed revision of RDA 2.1.2.2 and 2.1.2.3, Basis for Identification of the Resource: <http://www.rda-jsc.org/docs/6JSC-ALA-20.pdf>
2. Proposed Revisions of RDA instructions on Sources of Information (RDA 2.2.2.1–2.2.2.4): <http://www.rda-jsc.org/docs/6JSC-ALA-21.pdf>



## **MOUG/OLAC Liaison Report**

submitted by Mary Huismann  
University of Minnesota

Mark your calendars for the upcoming Music OCLC Users Group meeting! MOUG's annual meeting will be held in San Jose, CA, February 26-27 (immediately preceding the Music Library Association meeting). The meeting will offer a variety of program sessions with a general RDA theme.

The program is still under development and more information will be available later this fall. The "Lightning Talks" session will be back in 2013—by *very* popular demand. Each of the speakers in next year's Lightning Talks will address one specific aspect of RDA. Also taking shape is an informative session on OCLC's WorldShare Management Services, the ILS, and music databases. Finally, there will also be the "usual" sessions—MOUG Hot Topics, the NACO-Music Project meeting, the Enhance Working Session, and the MOUG Business Meeting.

Since there is an overlap this year with the RDA preconference workshop (co-sponsored by the Music Library Association Bibliographic Control Committee, the MLA Education Committee, the MLA Educational Outreach Program Subcommittee, and MOUG), a special one-day MOUG registration option will be offered. The second day of the MOUG meeting will offer programming with a more public services orientation.

For updated information, please monitor the Music OCLC Users website: <http://www.musicoclcusers.org>

## CALL FOR CANDIDATES - OLAC OFFICES

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

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

### OVERVIEW OF DUTIES

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

This office is elected annually, with a term beginning in the summer, and serves four years: a one-year term as Vice President, followed by one year as President, one year as Immediate Past President, and one year as Past-Past President. The VP/President Elect performs all duties delegated by the President and presides at meetings when the President cannot attend. The Vice President/President Elect is expected to attend OLAC Membership and Executive Board meetings (held during ALA conferences) while in office. The Vice President is also responsible for the OLAC Program at the ALA Annual Conference, should OLAC decide to sponsor a program. The VP/President Elect chairs the OLAC Research Grant Committee.

The OLAC President presides at all OLAC Membership and Executive Board meetings, is or appoints OLAC's Observer to the OCLC Members Council, submits quarterly reports for the OLAC Newsletter, and works closely with other members of the OLAC Executive Board in guiding the operations of the organization.

The Immediate Past President serves as Chair of the OLAC Awards Committee, Chair of the Website Steering Committee, and as a member of the OLAC Executive Board. The Past-Past President serves as Chair of the Elections Committee.

#### **Treasurer/Membership Coordinator**

The incumbent of this office serves a two-year term, with the election being held in years alternating with that of the office of Secretary. The next Treasurer's term will extend from summer 2013 to summer 2015. The Treasurer attends all Membership meetings and must meet the same attendance requirements as the Vice President/President Elect. The Treasurer is responsible for the overall financial concerns of OLAC. S/he reviews the OLAC budget, submits financial statements at the OLAC Executive Board meetings and for the OLAC Newsletter, handles OLAC funds, and maintains records of all sources of income and payments disbursed. The Treasurer is also the OLAC Membership Coordinator. As such

the Treasurer is responsible for keeping an accurate, current list of OLAC members and maintaining the database of the OLAC membership directory.

Members of the Executive Board receive a \$100 stipend for attending OLAC Membership meetings during ALA conferences. Anyone who wishes to run for either of these positions should submit a brief description of their qualifications and professional activities in time for them to be printed with the ballot. The deadline for this information is December 31, 2012.

Please submit all requested nomination materials in electronic form to:

(Ms.) Sevim McCutcheon  
Chair, OLAC Elections Committee  
[Lmccutch@kent.edu](mailto:Lmccutch@kent.edu)

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### **Call for CAPC participation!**

OLAC's Cataloging Policy Committee (CAPC) is seeking applicants for full member and/or intern positions with terms beginning after the ALA Annual Conference in June 2013. Qualifications are as follows: 3 years of current audiovisual cataloging experience or the equivalent; evidence of regular interaction with online cataloging systems or demonstrable knowledge of such systems.

Most CAPC business is conducted during the ALA Midwinter and ALA Annual conferences. Candidates for appointment to CAPC intern positions must be willing to commit time and funds as necessary to attend at least one of these meetings per year, and candidates for full-member positions must be willing to commit time and funds as necessary to attend both meetings each year.

If you are interested in applying for the CAPC intern position, please send a letter detailing your qualifications and your resume to Walter Walker by January 24, 2013. You can also send your application materials electronically to me at [wwalker@lmu.edu]. Feel free to contact me with any questions you may have. Appointments will be made in Seattle at ALA Midwinter 2013.

Contact information:  
Walter Walker  
William H. Hannon Library  
Loyola Marymount University  
1 LMU Dr., MS 8200  
Los Angeles, CA 90045-2659  
(310) 338-7687 (voice)  
(310) 338-4366 (fax)  
[wwalker@lmu.edu](mailto:wwalker@lmu.edu)

## NEWS AND ANNOUNCEMENTS

**Barbara Vaughan, Column Editor**

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### **OLAC Nancy B. Olson Award winner**

Congratulations to Bobby (Robert) Bothmann, Metadata & Emerging Technologies Librarian, Minnesota State University, Mankato for winning the 2012 Nancy B. Olson award! Bobby received a plaque at the OLAC Membership meeting at ALA this past June.

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### **Call for OLAC Conference reporters!**

Are you attending the OLAC conference in Albuquerque next month? Why not volunteer to write up a session for publication in the next OLAC Newsletter! Reports do not have to be exhaustive, only informative. Please review the reports for the 2010 OLAC conference in the December 2010 newsletter, which can be found at <http://olacinc.org/drupal/?q=node/59> to get an idea of what is expected. Your report will be published in the OLAC Newsletter, with your name and affiliation credited in the byline of your report. For those on the tenure-track or in other positions where publication is expected, your report can be used as a publication credit in a non-peer reviewed library periodical.

Additionally, your report will help to inform those who were unable to attend the conference and to provide a record of what OLAC does to support and enrich the professional lives of its members.

If you have any interest in being a conference reporter, please contact Jan Mayo at [mayoj@ecu.edu](mailto:mayoj@ecu.edu) as soon as possible. Please indicate your reporting preferences, if any. Thanks for your consideration.

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### **OLAC Conference Scholarship winner**

Each time there is an OLAC conference, a scholarship is awarded to a member who has never attended a conference before. This year's recipient is Tricia Mackenzie. She is a metadata librarian at George Mason University in Virginia. Tricia is responsible for original and complex copy cataloging of audiovisual materials, as well as training staff in copy cataloging of audiovisual materials. Congratulations, Tricia!

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### Now accepting proposals to host OLAC 2014

The Board of OLAC is accepting proposals to host the 2014 OLAC Conference. If you are interested, please read the summary of guidelines at:

<http://www.olacinc.org/drupal/?q=node/58#committeeformation>. According to our practice of varying the location of the host city, the 2014 conference should be held somewhere in the Midwest.

We look forward to hearing from interested parties, and to receiving proposals no later than **December 15, 2012**.

Proposals should be sent to Heidi Frank, OLAC President: [hf36@nyu.edu](mailto:hf36@nyu.edu).

Please let me know if you have any questions.

Liz Miller, OLAC Vice President/President-elect [eamiller@nmsu.edu](mailto:eamiller@nmsu.edu)

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### Mohican 2012: Radical Opportunities, New Trends for Technical Services

Registration is open for ***Mohican 2012: Radical Opportunities, New Trends for Technical Services***. Make plans now to attend the Ohio Library Council's Technical Services retreat on **Oct. 2-3 2012** at **Mohican State Park Lodge and Conference Center** in Loudonville, Ohio.

The event will feature keynote speaker **Dr. Bradford Lee Eden** from Valparaiso University, speaking on *Transformative Change: Why the Status Quo has Got to Go*.

The two fun-filled days of breakout sessions will feature presentations by:

- Bobby Bothmann, Minnesota State University
- Roman Panchyshyn, Kent State University
- Magda El-Sherbini, The Ohio State University
- Linda Gabel, OCLC
- Jay Weitz, OCLC
- Sue Polanka, Wright State University
- Joan Mitchell, OCLC/Dewey Editorial Office, Library of Congress
- Miriam B. Kahn, Kent State University
- Harry Courtright, Retired Director of Maricopa Public Library
- Brian C. Gray, Case Western Reserve University
- Carol Pitts Diedrichs, The Ohio State University

The retreat takes place in the beautiful Mohican State Park Lodge and Conference Center in Perrysville, Ohio. Visit <http://olc.org/techservicesretreat.asp> for online registration, a complete retreat agenda, and descriptions of the breakout sessions. Information about lodging registration is provided.

Members of ALAO and NOTSL may register for the conference at the member rate due to participation in OCLIS by those organizations.

## REVIEWS

**Katie Eller, Column Editor**

Demystifying FRAD: Functional Requirements for Authority Data  
Qiang Jin

*Demystifying FRAD: Functional Requirements for Authority Data* (2012) is perhaps the only publication on the conceptual model called the Functional Requirements for Authority Data, or FRAD. Unlike its fellow family member, the Functional Requirements for Bibliographic Records or FRBR, FRAD has received significantly less attention in the publishing world and on the Internet. This could be because FRAD came to fruition in 2009 in volume 34 of the International Federation of Library Association (IFLA) series on bibliographic control; the report on FRBR was published in 1998. As a result, Qiang Jin's book on FRAD is a timely and much needed addition on FRAD.

Qiang Jin is the Senior Coordinating Cataloger and NACO Coordinator at the main library at the University of Illinois at Urbana-Champaign Libraries. She is also an Associate Professor of Library Administration at Urbana-Champaign. In addition to her many awards and distinctions, she has an extensive publication record most notably in the area of the conceptual foundations of cataloging and authority control. As a result, this book is a natural consequence of her years of research and work.

The book's structure is straightforward. It consists of six chapters and closely follows the structure of the initial report published in the IFLA series on bibliographic control. Qiang Jin begins with a brief introduction to FRAD providing both the context of the creation of the report and an outline of events. Chapter two continues the introduction with a brief look at entity-relationship models. In this chapter, she also diagrams the FRAD entity-relationship model. In chapter three, she provides a brief summary of each of the entities and attributes of FRAD. An extensive chapter on relationships follows in chapter four. Chapter five describes the user tasks of FRAD. In the last chapter, the relationship of FRAD to the new cataloging code, Resource Description and Access, or RDA, is explained with the assistance of brief examples. If this wasn't enough, the appendix is a FRAD to RDA mapping, which is followed by a number of important suggested readings and an index.

Two of the most interesting sections are the ones about relationships and RDA. Chapter four, entitled Relationships, relates extensively the number, type and function of relationships found in FRAD. While this whole section has the potential to overwhelm the reader, Qiang Jin carefully lays out these relationships by systematically delivering the name of the relationship, entity type, a brief description of that relationship, its entity-relationship diagram, and a brief description of the diagram. The other notable section is on FRAD and RDA, where concrete and useful examples of RDA records are clarified. There is also the appendix or the FRAD-RDA mapping where the reader can easily see where and how FRAD has informed RDA. These sections are extremely helpful given that RDA will soon be adopted by many libraries not just for bibliographic records but also authority records.

The two drawbacks to Qiang Jin's exposition that hamper a fuller appreciation of the text are the minimal explanations and sections that are written unclearly, in particular the introduction. Her clarifications are definitely spot on but surprisingly terse. This lack of depth has the potential to confuse readers unfamiliar with the material. Furthermore, Qiang Jin's writing style can at times be difficult to follow because she jumps occasionally from one subject to another; this was especially apparent in the introduction. In this respect, it is almost as if she assumes the reader has some previous knowledge of the material. However, if the reader begins with Qiang Jin's suggested readings, in particular the background readings, the reader will be truly demystified.

Overall, Qiang Jin has succeeded in shedding light on FRAD. She has included a number of excellent examples, the FRAD to RDA mapping, and the chapter on relationships. This book is definitely a much needed entry into an area that has seen little to no publications on the subject.

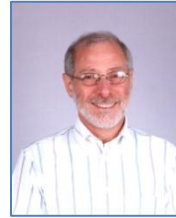
Published in 2012 as part of the Third Millennium Cataloging series edited by Susan Lazinger and Sheila Intner by: Libraries Unlimited, Santa Barbara, CA (viii, 134 p. : ill. ; 26 cm.) ISBN 978-1-59884-496-2 (pbk., alk. Paper - \$45.00)

Reviewed by:  
Jennifer M. Eustis  
Catalog/Metadata Librarian  
University of Connecticut Libraries  
Homer Babbidge Library  
Storrs, CT



**OLAC CATALOGER'S JUDGEMENT:  
QUESTIONS AND ANSWERS**

**Compiled by Jay Weitz**



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**Changing Rules in Mid-Stream**

**Question:** I'm cataloging streaming audio files and I'm stuck. According to the OLAC best practices PDF file, if the resource is available on a website as both a streaming file and a downloadable file don't use field 300 but give the physical details in a note. So using the sample records from OLAC, this is what I've come up with. The minutes for the files are not available.

500 Available as 6 streaming sound files (SWF) and downloadable sound files (MP3).

My problem is mostly the FlashPlayer files, I'm assuming that an Adobe FlashPlayer file is a SWF file? Should I include (SWF), if that's the right file name, in the note? SWF just looks odd, it's not a file name I see much. Any help and/or suggestions would be greatly appreciated, and if my note should be rewritten to sound better, I'd like to know that too. Some of these resources are available only for our library users. When I catalog those do I still include an 856 field but specify that it's available only for local use or do I just not include any type of 856 field? I see a lot of records in WorldCat that include an 856 field but the link is a local link only, which then needs to be removed from our OPAC, so I was also wondering what the best practice would be on those types of 856 links.

**Answer:** Although the Online Audiovisual Catalogers Cataloging Policy Committee's 2008 document "Best Practices for Cataloging Streaming Media"

([http://olacinc.org/drupal/capc\\_files/streamingmedia.pdf](http://olacinc.org/drupal/capc_files/streamingmedia.pdf)) remains quite useful, a few of its details need to be updated in light of more recent developments. OLAC CAPC is actually in the process of creating task groups to update several of their documents, including that for streaming media. The current recommendation would be to also take into consideration the suggestions of the Program for Cooperative Cataloging's "Provider-Neutral E-Monograph MARC Record Guide" (<http://www.loc.gov/aba/pcc/bibco/documents/PN-Guide.pdf>). It would call for the use of the 300 Physical Description field, formulated in your case along these lines: "1 online resource (6 sound files)". Apply the other appropriate practices noted in the P-N guidelines. Among other things, this would mean omitting your suggested 500 note and instead identifying the separate streaming and downloadable files via their separate 856 fields, using an introductory subfield \$3 to specify which URL applies to which. Your 856 fields might look something like these:

856 40 \$3 6 streaming sound files (SWF) \$u [URL]

856 40 \$3 6 downloadable sound files (MP3) \$u [URL]

By the way, the CAPC “Streaming Media” document (page 4) identifies files with the extension “.swf” as “Macromedia Flash, usually viewed by the Adobe Flash Player.” It’s listed under the “Streaming Video” file types, but apparently supports audio as well. Regarding those URLs, in your local version of the record, you should include your local links, of course. In the master bibliographic record, we would prefer that you substitute a generally-accessible URL if one is available, one that accesses a document’s information page rather than the document itself, if possible, or one that accesses a more general portal, if necessary.

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### It’s a Crime What Some Publishers Do

**Question:** *Law & order: Criminal intent. The seventh year '08-'09 season* has me a bit puzzled. This title is taken from the disc and the container artwork (#798093054). Season 6 of this series was aired in 2006 and 2007. Everything that I find online concerning season 7 tells me that it aired 2007 and 2008. The menu screen does not mention the '08-'09 as part of the title, so I am leaving that out of my bibliographic record, even though the OCLC record includes “'08-'09 season” in the title. Should I include some sort of disclaimer regarding the mention of the 2008-2009 season on the container? I added a note (based on information taken from the USA Network website, imdb.com and Amazon.com) stating that the show was originally broadcast 2007-2008. Any advice you can provide is greatly appreciated.

**Answer:** If the title on the disc label is being used in field 245 (as it sounds like it should be in this case), then the erroneous “'08-'09 season” would be included in that title proper. Because it is inaccurate, however, you should follow AACR2 1.0F1: “In an area where transcription from the item is required, transcribe an inaccuracy or a misspelled word as it appears in the item. Follow such an inaccuracy either by [sic] or by i.e. and the correction within square brackets.” Taken from the record in question, that would be “Law & order, Criminal intent. \$n The seventh year '08-'09 [i.e. '07-'08] season.” You may include an explanation with citation of the source, as appropriate, in a note.

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### Disc of a Different Color

**Question:** Is it appropriate to add NTSC to Blu-rays? We have a Blu-ray with NTSC on the container. (It looks as though they have copied the container art from the DVD.) One of my colleagues says that it's not appropriate to add this but I found the following example in the OLAC guide: “538 \$a Blu-ray; NTSC; region 1.” Also, is it appropriate to convert regions that appear on the container as letters to numbers? For example, should we convert region A to region 1?

**Answer:** As far as I’m aware, the color broadcast systems (NTSC and PAL at least, and probably the others) apply to Blu-ray Discs just as they do to DVDs, so you should include that data. If the disc’s region information appears in alphabetic form, transcribe it in alphabetic form. Although the regions for Blu-ray Discs occasionally appear in numeric form, they are usually represented alphabetically. The Blu-

ray region numbers (of which there are three) and the DVD region numbers (of which there are eight) do not correspond to each other.

## NEWS FROM OCLC

Compiled by Jay Weitz



### General News

#### **Jay Jordan Will Continue as President and CEO of OCLC**

The OCLC Board of Trustees has concluded that rather than moving forward with the appointment of Jack B. Blount as its President and CEO, it is in the best interest of OCLC to have Jay Jordan continue serving in these capacities. Mr. Jordan has agreed to postpone his retirement to continue leading OCLC. The OCLC Board of Trustees believes Mr. Jordan's strong track record, his skills as a leader, and his ability to identify and navigate emerging trends, make him uniquely qualified to serve the nearly 72,000 institutions that use OCLC services. Board Chair Larry Alford said, "The Board of Trustees has complete confidence in the global management team and the 1,250 employees, who are working diligently to serve libraries around the world and fulfill OCLC's mission and goals." Mr. Alford also said, "The Board is committed to an orderly transition of leadership and will be assessing its succession planning process as it moves forward." Mr. Jordan is the fourth president in OCLC's 43-year history. He came to OCLC after a 24-year career with Information Handling Services (IHS), an international publisher of databases, and prior to joining IHS, Mr. Jordan held positions with the 3M Corporation in Europe and the United States.

#### **OCLC Opens Data Center in Toronto, Canada**

As part of a plan to operate local and global systems at Webscale service levels, OCLC is now operating a new data center in Toronto, Canada. The Toronto center becomes the fifth international data center in OCLC's worldwide network and will enhance the cooperative's ability to deliver OCLC WorldShare Management Services to member libraries in Canada. Over the past eight months, OCLC opened data centers in Sydney, Australia, and London, England, while maintaining its two primary operations data centers in the United States. Another data center in Europe is scheduled to come online in 2013. The Toronto center employs best-in-class technologies to ensure the highest levels of performance, reliability, scalability, and cost-effectiveness. It also provides services 24/7 and is backed up by uninterruptible power systems and redundant heating, ventilation and air conditioning systems. In addition, the new center enables OCLC to comply with access and data privacy requirements in Canada and adhere to technical standards that promote the cost-effective, worldwide sharing of information across platforms, scripts, languages, and cultural materials. The new data center will support expansion of WorldShare Management Services, which provide a Web-based environment that streamlines cataloguing, acquisitions, license management, and circulation, and offer a next-gen discovery tool for library users. Both replacing and standing apart from traditional integrated library systems, OCLC WorldShare Management Services enable libraries to share infrastructure costs and resources, as well as collaborate in ways that free them from the restrictions of local hardware and software. WorldShare Management Services also offer the ability to manage collections of print, electronic, and digital

material from start-to-finish, and the integration of license management features into interlibrary loan processes set WorldShare Management Services apart from legacy systems.

## **Cataloging and Metadata**

### **OCLC Recommends Open Data Commons Attribution License for WorldCat Data**

OCLC is recommending the Open Data Commons Attribution License (ODC-BY) for member institutions that would like to release their library catalog data on the Web. This open data license provides the means for users to share WorldCat-derived data in a manner that is consistent with the cooperative's community norms defined in the "WorldCat Rights and Responsibilities" (<http://www.oclc.org/us/en/worldcat/recorduse/policy/default.htm>). Data can be freely shared subject only to attribution and OCLC's request that those making use of WorldCat derived data conform to the community norms. The recommendation follows passage of a resolution by OCLC Global Council in April 2012 that endorsed the ODC-BY, and recommended that OCLC staff consult with opinion leaders and stakeholders for further input. After researching and experimenting with different data licenses on OCLC and WorldCat data projects, and in close consultation with the library and developer communities, the recommendation was adopted by the OCLC Board of Trustees. Best practices in the Web environment include making data available along with a license that clearly sets out the terms under which the data is being made available. Without such a license, users can never be sure of their rights to use the data, which can impede innovation. The VIAF project and the recent addition of Schema.org linked data to WorldCat.org records were both made available under the ODC-BY license. Members of the OCLC cooperative routinely solicit OCLC's guidance on the use and transfer of WorldCat-derived records, from both licensing and technical perspectives. They do so knowing that "WorldCat Rights and Responsibilities" is the guiding document around use and transfer of WorldCat data. An OCLC staff group, supplemented by an external open data licensing expert, conducted a structured investigation of available licensing alternatives to provide OCLC member institutions with guidance. OCLC Global Council considered the conclusions of the OCLC staff group and approved this direction, as did the OCLC Board of Trustees. This recommendation has also been reviewed extensively with thought leaders in the library developer and metadata management communities. The ODC-BY license will also be used by OCLC as additional sets of WorldCat data are released, including future linked data projects. Going forward, OCLC will modify related processes and policies in order to make the cooperative's data sharing efforts more consistent with this recommendation.

### **OCLC Provides Linked Data File for 1 Million Most Widely Held Works in WorldCat**

OCLC has published bibliographic linked data for the most widely held works in WorldCat. This downloadable file—representing nearly 1.2 million resources—contains approximately 80 million linked data "triples," the term for the most granular relationship possible between discrete pieces of information. The linked data is provided as RDF serialization, and uses the Schema.org ontology as well as library extensions to Schema.org that OCLC has been working on with members and partners over the last year. It is being made available, under an ODC-BY data license (<http://www.oclc.org/us/en/data/attribution.html>), in a single, 1-gigabyte, compressed (GZip) file, which

can be downloaded from <http://purl.oclc.org/dataset/WorldCat/datadumps/WorldCatMostHighlyHeld-2012-05-15.nt.gz>. While WorldCat contains bibliographic records for more than 275 million items, the choice was made to select the most widely held materials, 250 or more holdings, for this release in order to help keep the file at a manageable size. In June 2012, OCLC added Schema.org tags to WorldCat.org records, improving the way in which library information is represented to search engines. OCLC has also developed linked data resources for the Dewey Decimal Classification System, FAST (Faceted Application of Subject Terminology), and the VIAF (Virtual International Authority File) service. The release of these 1.2 million records as linked data is the next step in OCLC's linked data strategy. To take part in the discussion about library linked data, sign up to participate in the linked data discussion forum on the OCLC Developer Network (<http://www.oclc.org/developer/groups/linked-data>) or send your thoughts via e-mail to [data@oclc.org](mailto:data@oclc.org).

### **OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2012**

In May 2012, OCLC implemented the changes related to the OCLC-MARC Bibliographic, Authority, and Holdings Formats Update 2012, which are detailed in OCLC Technical Bulletin 261 (<http://www.oclc.org/support/documentation/worldcat/tb/261/default.htm>). This installation includes MARC 21 Updates No. 13 (dated September 2011) and No. 14 (dated April 2012), code list additions and changes published chiefly since August 2011, and other suggestions from WorldCat users and OCLC staff. Many of these elements, including those from MARC 21 Updates No. 13 and 14, are related to Resource Description and Access (RDA). Among the points of interest:

- Implementation of new subfield \$0 (Authority Record Control Number or Standard Number) in fields 034 “Coded Cartographic Mathematical Data” and 043 (Geographic Area Code) in the Bibliographic and Authority Formats.
- Implementation of new subfields \$k (Language Code of Intermediate Translations), \$m (Language Code of Original Accompanying Materials Other Than Librettos), and \$n (Language Code of Original Libretto) in field 041 (Language Code) in the Bibliographic format.
- Implementation of new First Indicator “7” (Other Edition Specified in Subfield \$2) in fields 082 (Dewey Decimal Classification Number) and 083 (Additional Dewey Decimal Classification Number) in the Bibliographic and Authority Formats.
- Implementation of new subfield \$q (Assigning Agency) in field 084 (Other Classification Number) in the Bibliographic format.
- Implementation of new fields 264 (Production, Publication, Distribution, Manufacture, and Copyright Notice), 344 (Sound Characteristics), 345 (Projection Characteristics of Moving Image), 346 (Video Characteristics), 347 (Digital File Characteristics), and 377 (Associated Language) in the Bibliographic format. OCLC strongly recommends not using the new Bibliographic field 264 until guidelines for its use are available.
- Implementation of new subfields \$j (Generation), \$k (Layout), \$m (Book Format), \$n (Font Size), \$o (Polarity), \$0 (Authority Record Control Number or Standard Number), and \$2 (Source) in field 340 (Physical Medium) in the Bibliographic format.
- Implementation of new fields 368 (Other Corporate Body Attributes) and 378 (Fuller Form of Personal Name) in the Authority format.

- Implementation of new subfield \$l (Language term) in field 377 (Associated Language) in the Authority format.
- Implementation of new indicators and new subfields \$b (Soloist), \$d (Doubling Instrument), \$n (Number of Performers of the Same Medium), \$p (Alternative Medium of Performance), \$s (Total Number of Performers), and \$v (Note) in field 382 (Medium of Performance) in the Bibliographic and Authority formats. Name Authority Cooperative (NACO) participants should not implement the changes to Authority field 382 until OCLC announces that implementation and testing by all NACO nodes is complete.
- Implementation of new subfields \$d (Thematic Index Code), \$e (Publisher Associated with Serial or Opus Number), and \$2 (Source Code) in field 383 (Numeric Designation of Musical Work) in the Bibliographic and Authority formats.

## **Discovery and Reference**

### **WorldCat Local: Easier Electronic Materials Management and eBook Discovery**

The latest enhancements for WorldCat Local include updates to the WorldCat knowledge base and A-Z list functionality. The latest additions to the popular discovery and delivery service include the following new member-requested features:

- The WorldCat knowledge base now includes collection-level URLs, a new linkscheme feature and API/User Interface improvements to make it that much easier to manage your electronic materials.
- A-Z functionality now includes a browse feature for e-Books and new Note fields are now available.
- Content continues to grow in the WorldCat central index--the extended view of WorldCat that includes 969+ million items, including licensed electronic content from publishers worldwide, open access digital materials from institutional repositories, and evaluative items such as reviews, ratings, and more. The central index now includes 3 recently-added databases:
  - American National Biography Online from Oxford University Press.
  - Royal Society of Chemistry Journals from the Royal Society of Chemistry.
  - World Bank eLibrary from the World Bank.

Get the latest content additions and suggest ones you'd like to see added to WorldCat Local.

### **OCLC Partners with MetaMetrics to Provide Lexile Measures for WorldCat**

MetaMetrics, developer of The Lexile Framework for Reading, and OCLC are pleased to announce that they have significantly expanded their relationship. For the past few years MetaMetrics' popular "Find a Book" tool has utilized OCLC's widely-used WorldCat.org to connect readers to libraries where books at their reading level can be found. OCLC and MetaMetrics have taken another big step in their literacy partnership by directly providing Lexile measure for more than 125,000 titles in WorldCat. OCLC and MetaMetrics have worked together previously to promote Summer Reading programs with WorldCat tools that make a difference to students' academic achievements.

## **Resource Sharing and Delivery**

### **OCLC Adds Linked Data to WorldCat.org**

OCLC is taking the first step toward adding linked data to WorldCat by appending Schema.org descriptive mark-up to WorldCat.org pages. WorldCat.org now offers the largest set of linked bibliographic data on the Web. With the addition of Schema.org markup to all book, journal, and other bibliographic resources in WorldCat.org, the entire publicly available version of WorldCat is now available for use by intelligent Web crawlers, like Google and Bing, that can make use of this metadata in search indexes and other applications. Commercial developers that rely on Web-based services have been exploring ways to exploit the potential of linked data. The Schema.org initiative—launched in 2011 by Google, Bing and Yahoo! and later joined by Yandex—provides a core vocabulary for markup that helps search engines and other Web crawlers more directly make use of the underlying data that powers many online services. OCLC is working with the Schema.org community to develop and add a set of vocabulary extensions to WorldCat data. Schema.org and library specific extensions will provide a valuable two-way bridge between the library community and the consumer Web. Schema.org is working with a number of other industries to provide similar sets of extensions for other specific use cases. The opportunities that linked data provide to the global library community are in line with OCLC's core strategy of collaboratively building Webscale with libraries. Adding linked data to WorldCat records makes those records more useful—especially to search engines, developers, and services on the wider Web, beyond the library community. This will make it easier for search engines to connect non-library organizations to library data. OCLC sees Schema.org as a timely and significant development toward linked data technology adoption that will provide recognizable benefits for libraries. Further demonstrating its role in providing linked library data, OCLC has recently announced that the full set of DDC 23—more than 23,000 assignable numbers and captions in English—is now available as linked data. OCLC is committed to the stability and improved functionality of linked bibliographic data. It is likely that such markup may evolve over the coming months as the community develops a common understanding. This release should be considered experimental and subject to change. This linked data release of WorldCat.org is made available by OCLC under the [Open Data Commons Attribution License](http://opendatacommons.org/licenses/by/summary/). (<http://opendatacommons.org/licenses/by/summary/>).

### **Article Exchange API Now Available**

A new API gives developers access to OCLC's Article Exchange document-sharing site. Article Exchange provides a single, secure location where lending libraries can place requested documents for retrieval by library users. Since Article Exchange went into production on January 13, use of the site has increased rapidly. Nearly 600 libraries from 16 countries have uploaded documents to the site so far, and usage stands at more than 20,000 document uploads per month. The new API is a write Web service for cloud-based document delivery. With the API, developers can upload and share documents of image-type files, such as .pdf, .png, .jpg, .tiff, and other image file formats. Upon successful upload, the JSON or XML response contains a unique password-protected URL that can be shared with library users so they can retrieve materials requested through interlibrary loan. Article Exchange API details for developers are available on the OCLC Developer network site at <http://www.oclc.org/developer/services/article-exchange-api>.



## **ILLiad Version 8.3 Includes Full Unicode, Mobile Web Pages, NCIP, and More**

ILLiad version 8.3 is now available for self-hosted and hosted versions of ILLiad. Enhancements included in version 8.3 include full Unicode support, mobile web pages, and circulation interoperability with NCIP-enabled ILS systems. Version 8.3 enhancements include:

- Mobile web pages: Mobile web pages allow users to access their ILLiad accounts via iPhone or Android.
- Circulation workflows: New functionality supports seamless circulation interoperability in borrowing and lending for sites with NCIP, OCLC Gateway, or other add-on connections.
  - Borrowing processes allow sites to track items received and returned to lending institutions using Check In from Lending Library and Check In from Customer.
  - Lending processes support checkout and checkin via the local ILS.

While this version supports NCIP connectivity to your local ILS, this functionality requires customized add-ons, and there may be a cost for implementing NCIP. If you would like Atlas to create an NCIP add-on for you, contact [training@atlas-sys.com](mailto:training@atlas-sys.com).

- Unicode compliance: ILLiad is now fully Unicode compliant, supporting Chinese, Japanese, Korean, Hebrew, Arabic, Latin Extended, and other non-Western character sets. Web service updates:
  - A connection to OCLC's Item Availability web service simplifies lending as staff can view item availability within the ILLiad interface.
  - OCLC's updated web service version 1.6 splits shipping and billing addresses into separate fields.

NOTE: The Unicode enhancement will approximately double the size of your database. If you are a self-hosted site, make sure you have sufficient local space to accommodate this change. To eliminate the need to manage hardware and software upgrades locally, you may wish to move to hosted ILLiad. Contact Alisa Whitt at [whitta@oclc.org](mailto:whitta@oclc.org) or 843.276.8048 for hosted ILLiad details and pricing. Hosted ILLiad users should contact OCLC or Atlas Systems to schedule their upgrade.

## **Management Services and Systems**

### **OCLC, EBSCO Partnership Offers Interoperability, Increased Discovery Options**

OCLC and EBSCO Publishing (EBSCO) have signed an agreement to make EBSCO Discovery Service™ (EDS) interoperable with OCLC WorldShare Management Services, enabling libraries to use EDS as their discovery layer and WorldShare Management Services as their library management system.

Additionally, the companies are investigating working toward an integrated solution allowing WorldCat Local users who also subscribe to EDS to search and retrieve results from EDS within the WorldCat Local service. Libraries using the integrated EDS-WMS solution will be able to perform cataloging, acquisitions, license management, and circulation in OCLC's next generation cloud-based management system, while providing their patrons with the EDS discovery service as a user front end. OCLC and

EBSCO are working together to integrate such key WMS functions into EDS as patron identity management, item availability, circulation, and system configuration. Because libraries using this integrated solution will catalog in WorldCat, users of EDS in this configuration will have the ability to access all of WorldCat. This strategic partnership reflects OCLC's commitment to provide broader access to the Platform environment and WorldCat data, outside of OCLC developed applications.

## **Digital Collection Management**

### **New Release of WorldCat Digital Collection Gateway**

OCLC is pleased to announce a new release of WorldCat Digital Collection Gateway release (version 2.8). The Digital Collection Gateway is the self-service tool that enables repository managers to expose their library's, museum's, or archives' metadata through WorldCat and all of its syndicates. With this new release, OCLC has added more features to support increasing the visibility of unique, open access digital collections, including:

- **Thumbnail mapping.** If your repository metadata includes thumbnail URLs you can now map that URL so the thumbnail will be displayed in WorldCat Local and WorldCat.org.
- **A-Z List.** Any repository you've registered is always included in the A-Z List of contributors to the OAIster collection in WorldCat. If you include a repository description in the OAI Identify response from your repository those details are included in the A-Z List entry for your repository.
- **Collection descriptions.** If your repository includes descriptions of its collections in the OAI ListSets response, those descriptions are included in WorldCat as collection description records. The Digital Collection Gateway adds value to collection descriptions and item records when collection descriptions exist. The Digital Collection Gateway adds search links to retrieve all the items in a collection, and each item record includes a link to its associated collection description.

In addition, these Digital Collection Gateway features, which were released earlier in 2012, have been enhanced for better performance in version 2.8:

- **Search capability added to metadata map function.** Users can now search for a specific OAI record identifier when editing the metadata map for a collection. This feature becomes useful for large collections that may have particular records with characteristics that cause validation errors. The user can look up the OAI record identifier in the Gateway Sync Report, then paste that into the search box to navigate directly to the record in error.
- **More MARC notes fields available for mapping.** When a user selects More -> Show Unmapped Fields they are presented with many more MARC "notes" field options to support digital content descriptions. New fields include 518, 520, 530, 533, and 820.
- **Detailed help for Repository Registration Test.** When a user is registering a new repository they are presented with detailed troubleshooting help after their repository has had the Digital Collection Gateway's compatibility tests run against it.
- **Gateway updates repository display name if it changes.** If a repository changes the display name of the repository in the OAI-PMH Identify response, the Digital Collection Gateway will

pick up this change and use it in all user interface displays. Prior to this the Digital Collection Gateway saved the display name at registration time and never updated it.

Many thanks to all the Digital Collection Gateway users, CONTENTdm and other OAI repository administrators, who suggested these useful feature enhancements!

## **WebJunction**

### **Public Libraries to Lead Initiative to Ensure Public Access to Digital Content**

The Institute of Museum and Library Services (IMLS) has awarded a \$99,957 grant to OCLC for a new initiative, “The Big Shift: Advancing Public Library Participation in Our Digital Future.” The purpose of the grant is to more fully understand the challenges that U.S. public libraries face in providing e-book content to borrowers, as they ensure that all Americans continue to have access to commercially-produced content through their local public libraries, even as formats change. OCLC will partner with the American Library Association (ALA) and the Public Library Association (PLA) to review the e-book landscape and jointly develop recommendations for managing the e-book environment, in order to ensure adequate public access to these emerging resources. Research indicates that libraries are at a tipping point in e-content investment, as the percentage of e-book and e-journal collection expenditures continues to steadily outgrow print books and journals each year—and is likely to increase exponentially with the rapid growth in e-book adoption.

- The number of public libraries that offer e-books has doubled in the past five years—to 76 percent from 38 percent, according to a new ALA report. Thirty-nine percent of libraries also offer e-readers for check-out to their patrons.
- E-books dominate public library concerns, and are the most popular new initiative of this year, according to an OCLC membership survey.
- In 2011, public library e-book collections increased a staggering 183 percent, according to Library Journal's EBook Penetration & Use in Public Libraries.
- From 1999—2009, e-resources as a percentage of total collection expenditures more than doubled, from 5.4 percent to 12 percent, according to IMLS.

This award builds on an IMLS-supported public library discussion hosted by Martin Gómez at the Los Angeles Public Library in November 2011. Grant activities will include:

- Investigating the nature and extent of challenges that public libraries are facing in this area, and identifying possible solutions.
- A convening of public library leaders and others to set specific strategies to ensure public access to digital content.
- Reporting on strategies that all public libraries can use to advance their own work in local communities.

Gómez (University of Southern California), Patrick Losinski (Columbus Metropolitan Library), Brian Bannon (Chicago Public Library), and Vailey Oehlke (Multnomah County Library) will provide guidance

on the program's activities, which will be closely coordinated with the ALA's Digital Content & Libraries Working Group, co-chaired by Sari Feldman (Cuyahoga County Public Library) and Robert Wolven (Columbia University).

### **Mississippi Library Commission Joins WebJunction Partner Program**

The Mississippi Library Commission has joined the WebJunction Partner Program to provide library staff in Mississippi access to training resources through WebJunction that will keep skills up-to-date and help libraries respond to current patron needs. WebJunction-Mississippi is a new service for the professional development needs of Mississippi library staff, offering unlimited access to self-paced courses at no charge, and free webinars and reading material produced and collected by WebJunction staff on hot topics of interest to libraries. Access to WebJunction's on-demand library skills resources support the professional development of Mississippi's library personnel so that they can provide their communities with the library services they need to thrive in the 21st century. WebJunction's content covers a wide variety of library-related topics, including technical services, management and administration, and front-line public services. Training resources are designed to be self-paced and to fit around busy schedules. WebJunction-Mississippi and the Mississippi Library Commission's continuing education program are supported in part by the federal Institute of Museum and Library Services under the provisions of the Library Services and Technology Act as administered by the Mississippi Library Commission. Mississippi is among 18 states that are currently part of the WebJunction Partner Program. Through the Partner Program, library staff receive premium access to the courses, programs, and localized training through WebJunction.org. The Partner Program is designed to provide efficient and affordable training solutions to state libraries, freeing up resources to focus on local needs. Partners work together with WebJunction to meet common training goals, thus saving state libraries time and money, and extending training opportunities to thousands of library staff. A list of links to WebJunction Partner communities is available on the WebJunction.org website.

### **IMLS Announces Digital Literacy Grant**

On June 14, 2012, the Institute of Museum and Library Services (IMLS) announced a \$250,000 award to WebJunction to work with state libraries in Illinois, Mississippi, and West Virginia; federal policy makers; and the national nonprofit Connect2Compete to help national digital literacy efforts effectively work with libraries to plan for and deliver digital literacy training. The grant will identify model approaches for partnerships with libraries to meet public demand for training. During the past year, the Federal Communications Commission (FCC) announced major commitments from the private sector, foundations, and individuals to work with Connect2Compete, a national nonprofit organization with an ambitious goal to "harness digital opportunity for all Americans."

### **Project Compass National Convening Offers Opportunity to Share Best Practices**

Library staff members representing 45 states and the District of Columbia met in Washington, D.C., 2012 April 25–26, for the Project Compass National Convening, an opportunity for 215 participants in the project to share ideas in support of public libraries' efforts to meet the urgent and growing needs of communities impacted by the economic downturn. Attendees shared stories of patron impact, and

worked together to learn about common challenges and find new, 21st century solutions to support their local economies. The convening featured guest speakers Mary Chute and Susan Hildreth from the Institute of Museum and Library Services (IMLS); futurist Garry Golden; Assistant Secretary Jane Oates of the Employment and Training Administration of the Department of Labor; Terri Bergman from the National Association of Workforce Boards; author Marilyn Johnson; and Ron Carlee, from the International City/County Management Association. Funded by a grant from IMLS, WebJunction and the State Library of North Carolina (SLNC) launched Project Compass on 2009 October 1 to investigate job seekers' specific demands on public libraries. Since then, the IMLS-funded grant program has supported workforce recovery efforts in U.S. libraries through state library summits, face-to-face and online training, and a Workforce Services (<http://www.webjunction.org/content/webjunction/explore-topics/workforce-resources.html>) community of practice that includes the Project Compass Workshop Materials (<http://www.webjunction.org/content/webjunction/explore-topics/workforce-resources/materials.html>).

## **OCLC Research**

### **OCLC Research to Develop Semantic Algorithms with the Europeana Dataset**

OCLC and Europeana are collaborating to investigate ways of creating semantic links between the millions of digital objects that are accessible online through Europeana.eu in order to improve “similar object” browsing. Europeana is Europe’s digital library, archive and museum. The Europeana platform and network of experts facilitate research and knowledge exchange between librarians, curators, and archivists, and link them with digital innovators and the creative industries. Europeana currently gives people access to over 24 million books, paintings, films, recordings, photographs, and archival records from 2,200 partner organizations, through an interface in 29 languages. Because aggregating metadata from these heterogeneous collections leads to quality issues such as duplication, uneven granularity of the object descriptions, ambiguity between original and derivative versions of the same object, etc., Europeana and OCLC Research are working together on innovative pilots to identify and create semantic links between objects that are connected. Examples of this include translated copies of the same publication, a painting and a photograph of that painting, different editions of one book, or a collection of letters that belong to the same archive. OCLC Research has extensive experience and expertise in metadata quality improvement techniques and methods, such as duplicate detection and clustering of similar metadata records around FRBR-entity-relationships, reproductions and originals, different cataloging languages. In addition, OCLC Research is currently experimenting with the automated enhancement of records with links to the Virtual International Authority File (VIAF) and other Linked Data elements. The data quality improvement and enrichment efforts of OCLC are part of its philosophy to “make the metadata work harder for libraries” and to enhance end-user experience. The collaboration between Europeana and OCLC Research will benefit both organizations and their partners, offering new opportunities for data enrichment. The outcomes of the research project will feed into the implementation of the Europeana Data Model (EDM), which is devised to improve the browsing experience of the visitors of Europeana.eu. In addition, the piloting of our data clustering and enrichment methods and techniques will inform follow-up activities in more innovative directions and

opportunities to develop new data services for third parties. The team members working on the research project are all based in the Netherlands. Europeana team members include Antoine Isaac, Scientific Coordinator; Valentine Charles, Ingestion Specialist; and Nuno Freire, Interoperability Architect at The European Library. OCLC Research team members include Titia van der Werf, Senior Program Officer; Shenghui Wang, Research Scientist; and Rob Koopman, Innovation Lab Architect.

### **New Report on Managing Born-Digital Content on Physical Media**

The report *You've Got to Walk Before You Can Run: First Steps for Managing Born-Digital Content Received on Physical Media* is geared to those tasked with gaining preliminary control over the digital media in an archives' collections, including those who don't know where to begin in managing born-digital materials. Written by Senior Program Officer Ricky Erway, the report errs on the side of simplicity and describes what is truly necessary to start managing born-digital content on physical media. It presents a list of the basic steps without expanding on archival theory or the use of particular software tools. It does not assume that policies are in place or that those performing the tasks are familiar with traditional archival practices, nor does it assume that significant IT support is available. Eighteen well-respected advisors weighed in on the guidance, ensuring that it was not just simple, but authoritative. For a quick overview of the report, watch the video featuring Ricky Erway on YouTube at [http://youtu.be/Mu\\_TC35u8cw](http://youtu.be/Mu_TC35u8cw). For more information about the work related to the report, see the Demystifying Born Digital activity page at <http://www.oclc.org/research/activities/borndigital.html>. Read the report at <http://oclc.org/research/publications/library/2012/2012-06r.html>.

### **New Publication: *Using Authorities to Improve Subject Searches***

The National Library of Estonia has published the paper *Using Authorities to Improve Subject Searches* by OCLC Researchers Edward T. O'Neill, Rick Bennett, and Kerre Kammerer, along with other papers from the IFLA Satellite Post-Conference, Beyond libraries: Subject Metadata in the Digital Environment and Semantic Web, 17-18 August 2012, in Tallinn (Estonia). The paper was presented on Friday, 17 August, during Session 1: User needs and subject access design in the digital environment. Authority files have played an important role in improving the quality of indexing and subject cataloging. Although authorities can significantly improve search by increasing the number of access points, they are rarely an integral part of the information retrieval process, particularly end-users searches. A retrieval prototype, searchFAST, was developed to test the feasibility of using an authority file as an index to bibliographic records. searchFAST uses FAST (Faceted Application of Subject Terminology) as an index to OCLC's WorldCat.org bibliographic database. The searchFAST methodology complements, rather than replaces, existing WorldCat.org access. The bibliographic file is searched indirectly; first the authority file is searched to identify appropriate subject headings, then the headings are used to retrieve the matching bibliographic records. The prototype demonstrates the effectiveness and practicality of using an authority file as an index. Searching the authority file leverages authority control work by increasing the number of access points while supporting a simple interface designed for end users. The paper is available at [http://www.nlib.ee/html/yritus/ifla\\_jarel/papers/1-1\\_ONeill.docx](http://www.nlib.ee/html/yritus/ifla_jarel/papers/1-1_ONeill.docx).

### **New Report: *Print Management at “Mega-Scale”***

The report *Print Management at “Mega-scale:” A Regional Perspective on Print Book Collections in North America* provides insight into the characteristics of regionally consolidated print collections, key relationships across these collections, and their implications for system-wide issues such as information access, mass digitization, resource sharing, and preservation of library resources. Written by OCLC Researchers Brian Lavoie, Constance Malpas, and JD Shipengrover, *Print Management at “Mega-scale”* combines urbanist Richard Florida's mega-regions concept with WorldCat data to construct twelve regionally consolidated print book collections. The analysis of the regional collections is synthesized into a set of stylized facts describing their salient characteristics, as well as key cross-regional relationships among the collections. The stylized facts motivate a number of key implications regarding access, management, preservation, and other topics considered in the context of a network of regionally consolidated print book collections. The report also presents a simple framework to organize the landscape of print book collection consolidation models, as well as to clarify and distinguish basic assumptions regarding print consolidation. *Print Management at “Mega-scale”* provides a unique perspective on the new geography of library service provision, in which services and collections are increasingly organized “above the institution.” Read the report at <http://www.oclc.org/research/publications/library/2012/2012-05r.htm>. Learn more about the OCLC research activity associated with this report at <http://www.oclc.org/research/activities/mega-scale/default.htm>.

### **Issue 5 of *OCLC Research Quarterly Highlights* Now Available**

This periodic bulletin *OCLC Research Quarterly Highlights* gathers items from the previous quarter of work in OCLC Research, the OCLC Innovation Lab, and the OCLC Research Library Partnership. Issue 5 covers the period April-June 2012. Highlights include:

- Jim Michalko, in a guest essay on Mobilizing Unique Materials.
- Senior Research Scientist Jean Godby on her interest in language, linguistics, and language processing at OCLC Research.
- Featured prototypes and publications.
- A recap of OCLC Research News, Events, Webcasts, and Presentations.
- Featured activities from the six themes of our agenda of current work.

The current issue of *OCLC Research Quarterly Highlights* is available at <http://www.oclc.org/research/publications/newsletters/quarterlyhighlights/current.htm>. Previous issues are available at <http://www.oclc.org/research/publications/newsletters/quarterlyhighlights/default.htm>.

## OCLC QC TIP OF THE MONTH

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

This month's tip is a compilation of useful items that have come from listservs, user queries, and varied documentation.

### **Connexion Client 2.4 usage:**

Validating a record before replacing it helps to eliminate errors. If you get a validation error that refers to a specific character you can then use Edit>MARC-8 Characters>Verify to find the offending character quickly.

Colors can be set for any number of items including the Bibliographic Window, Bibliographic Text, and Bibliographic Field. Just go to Tools>Options>Record Display. You can even set a special color for Invalid MARC-8 characters so they are more readily visible in large strings of data.

To input field 776 <http://www.oclc.org/bibformats/en/7xx/776.shtm> go to Edit>Insert from Cited Record. Also, it is acceptable to use field 776 without subfield \$w. The item referred to in field 776 only needs to exist, but there is not always a control number of a corresponding bibliographic record to cite in subfield \$w. In the case where you are cataloging the print reproduction of a publication, it would also be okay to provide a field 776 link to the online version as in record #794229502.

When you derive records, you can set the fields that you use often (like 007, 034, 043, and 052 for maps cataloging) so that they will transfer to the new record. Just go to Tools>Options>Derive Record and select the fields to transfer.

Want help inputting RDA 336 (Content Type), 337 (Media Type) and 338 (Carrier Type) fields? If so, there is a macro called Add33X in the OCLC macrobook that was issued with version 2.40 of the Connexion client.

### **Documentation changes of note:**

#### **Fixed Field coding of GPub Government Publication**

<http://www.oclc.org/bibformats/en/fixedfield/gpub.shtm> changed significantly. Now it is important to consider the **"Status of the governmental entity**. Choose a code based on the status of the jurisdiction at the time of publication, e.g., for Texas government publications, use code *f* for the period 1836-1845 and code *s* for the period 1845-"



**Field 040 Cataloging Source** <http://www.oclc.org/bibformats/en/0xx/040.shtm> Definition now includes this statement: "Historically in WorldCat the absence of subfield #b has indicated that English is the language of cataloging. OCLC now recommends always coding this element."

**Technical Bulletin 261 OCLC-MARC Format Update 2012**

<http://www.oclc.org/support/documentation/worldcat/tb/261/default.htm> now has published guidelines from PCC on the use of field 264, so this field may now be used on bibliographic records in Connexion. Records with this field include: #794487536, #792796689, #792795546, #792794712, and #792795308

Remember, when in doubt check Connexion Help or Connexion documentation can be found as follows:

Connexion client documentation:

<http://www.oclc.org/support/documentation/connexion/client/default.htm>

Connexion browser documentation:

<http://www.oclc.org/support/documentation/connexion/browser/default.htm>

Print one of these Quick References. They are meant to be used as hard copy and provide, among other things, selected default function key shortcuts and default toolbar button information:

<http://www.oclc.org/support/documentation/connexion/client/cataloging/catquickref/connexionclientquickref.pdf>

<http://www.oclc.org/support/documentation/connexion/client/authorities/authquickref/clientauthoritiesquickreference.pdf>

[http://www.oclc.org/support/documentation/connexion/browser/cataloging/cnx\\_br\\_cat\\_quick\\_ref/cnx\\_br\\_ref\\_card\\_05.pdf](http://www.oclc.org/support/documentation/connexion/browser/cataloging/cnx_br_cat_quick_ref/cnx_br_ref_card_05.pdf)

Email addresses for contacting OCLC:

[bibchange@oclc.org](mailto:bibchange@oclc.org) = ask questions about bibliographic records, report bibliographic errors you cannot correct, report duplicate bibliographic records, cataloging issues in general, etc.

[authfile@oclc.org](mailto:authfile@oclc.org) = non-NACO libraries: report authority record errors or duplicates, etc. ; NACO libraries: questions about locked authority records, discrepancies between copies of the file, authorization number issues, etc.

[askqc@oclc.org](mailto:askqc@oclc.org) = cataloging policy, standards, and practices questions

[enhance@oclc.org](mailto:enhance@oclc.org) = all things Enhance (including authorization number issues, National Enhance, etc.)

[support@oclc.org](mailto:support@oclc.org) = Connexion functionality problems, issues with other products, cover art, anything not listed above

OLAC MEMBERS:  
IS YOUR DIRECTORY INFORMATION CORRECT?  
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<http://olacinc.org/drupal/?q=node/9>

If you have forgotten your Username or password please contact:

Teressa Keenan

Teressa.keenan@umontana.edu

OLAC Web Page & OLAC-L Administrator

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

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