What’s New in Cataloging, 2014

MOBIUS Annual Conference
June 2014

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What’s New 2013 – Useful Tools

Zvon.org

cleaning information pipelines

30th January 2011
Zvon.org guide to CIA World Factbook - graphs, maps, data, flags, ... includes YouTube demo

17th January 2011
Zvon.org guide to Skeptic Arguments has been published - rebuttals of common climate skeptics' arguments

6th January 2011
Zvon.org guide to RealClimate.org has been published - in-depth information about Earth's climate

More news at Twitter / Facebook

Keywords
ABC DEFGHIJKLMNOPQRSTUVWXYZ numbers symbols

input box in left column offers interactive search through thousands of keywords

comp (programming)
- references - tutorials
- glossaries - RFC browser
- xml - html - css
- unicode - SVG - MathML
- XSLT - XPath - Schemas
- regular expressions - Python
- SQR - Dublin Core
and more ...

eco (planet Earth)
- Guide to CIA World Factbook
- Guide to Fourth Assessment Report of Intergovernmental Panel on Climate Change (IPCC AR4)
- Guide to RealClimate.org
- Guide to Skeptic Arguments
- In Czech: Ekologická říma - web a formular (137/2008 SB)

lib (librarians)
- free ebooks (Gutenberg)
- Library of Congress Subject Headings (LCSH)
- Library of Congress Classification Outline (LCC)
and more ...

law (international law)
- conventions - constitutions
- treaties - protocols
- human rights - racism
- women - children
- environment - terrorism
- war - outer space
- intellectual property
and more ...
Keyword: journalism

Refine: 

* ... subject heading
--Military journalism  {Journalism, Military}
Aeronautical journalism  {Journalism, Aeronautical}
Aeronautics in journalism*
African American journalism  {African American press}
Agricultural journalism  {Journalism, Agricultural}
Amateur journalism*
Anarchist journalism  {Journalism, Anarchist}
Anchors (Television journalism)  {Television news anchors}
Armed Forces--Journalism  {Journalism, Military}
Audiotapes in radio journalism*
Automotive journalism*
Baptist journalism  {Baptist press}
Bias in journalism  {Journalism--Objectivity}
Broadcast journalism*

LCSH Search
journalis
journalism
journalisme
journalistenpreis
journalistic
journalists
Keyword: metadata

Refine:

* ... subject heading
Dublin Metadata Core Element Set (dublin core)
Harvesting, Metadata (Metadata harvesting)
Metadata*
Metadata databases (Metadatabases)
Metadata harvesting*
What’s New 2014
Part 1: Covered at Conference
AACR2

- What’s New?
- Nothing!
Final date for BIBCO and CONSER bibliographic contributions formulated according to AACR2: December 31, 2014

• At the November 2013 meeting of the PCC Policy Committee (PoCo), it was decided that December 31, 2014 will be the last date for contributing new BIBCO and CONSER records formulated according to AACR2. Starting January 1, 2015, all new PCC bibliographic record contributions must follow RDA, the BIBCO Standard Record, the CONSER Standard Record, and other PCC program guidelines for bibliographic description.

• More information: http://www.loc.gov/aba/pcc/documents/Final-date-AACR2-PCC-Bib.html
Undifferentiated Personal Names
- Authority Records

• No new identities are being added to undifferentiated name authority records as of November 2013
• New options in RDA should be used to create a unique authorized access points (RDA 9.19)
  • date of birth (9.3.2)
  • date of death (9.3.3)
  • fuller form of name (9.5)
  • period of activity (9.3.4)
  • profession or occupation (9.16)
  • title of the person, including terms of rank, honor, or office (9.4)
  • other designation associated with the person (9.6)

http://www.loc.gov/aba/pcc/rda/PCC%20RDA%20guidelines/Z01%2008%2032%202014rfeb.pdf
Undifferentiated Personal Names
- Authority Records

When information is found to distinguish a person included in an existing undifferentiated name record:

• Always create a new name authority record for that person, with distinguishing information.

• Transfer information pertaining to that person from the undifferentiated name record and edit as necessary.
Undifferentiated Personal Names
- Connexion

• As part of the Feb 2014 Connexion install, the ability to control a name to an undifferentiated authority record is no longer supported and OCLC uncontrolled all headings that were controlled to undifferentiated name authority records
• Source: Technical Services Law Librarian
RDA Development

- JSC = Joint Steering Committee for Development of RDA
- Members are representatives from:
  - American Library Association
  - Australian Committee on Cataloguing
  - British Library
  - Canadian Committee of Cataloguing
  - CILIP: Chartered Institute of Library and Information Professionals
  - Deutsche Nationalbibliothek
  - Library of Congress
RDA Revisions

• The RDA toolkit is revised four times a year, on the second Tuesday of the month.
• An “update” occurs when the changes in content are the result of formal proposals.
• Source: 6JSC/Chair/7/rev/2.

• Recent revisions (fast track changes): November 2013, February 2014, April 2014.
• Update: April 2014, which is based on result of decisions at the November 2013 meeting of the JSC.
RDA Updates – April 2014

• Note on manifestation and item – Chapters 2 and 3
  • Generally changes had to do with adding instructions to add notes on various changes if they are considered important for identification or access.
  • Also, sometimes notes are now required:
    • 2.7.6.3. Recording Date of Production.
      • ... If the date as it appears in the resource is known to be fictitious or incorrect, make a note giving the actual date (see 2.17.6.3).
    • 2.12.9.3. Recording numbering within Series.
      • ... If the numbering that appears on the source of information is known to be incorrect, transcribe it as it appears. Make a note giving the correct numbering (see 2.17.11.4).
  • Renumbering of RDA occurred for sections in Chapters 2 and 3.
• 2.3.1.7. Titles of Parts, Sections, and Supplements
  • Change: If a part title can stand on its own, record it on its own
  • 2.3.1.7.2. If the title of a separately issued part, section, or supplement appears on the same source of information with the title common to all parts or sections (or the title of the larger resource)

and

• the title of the part, section, or supplement alone is sufficient to identify the resource

Then:

• Record the title of the part, section, or supplement as the title
• Example: Mary Tyler Moore. Chuckles bites the dust
  Under RDA, title proper is: Chuckles bites the dust
  with Series: Mary Tyler Moore
RDA Updates – April 2014

- Production, publication, distribution and manufacture statements (2.7, 2.8, 2.9, 2.10)
  - Added option:
    - Omit levels in a corporate hierarchy that are not required to identify the producer [publisher / distributor / manufacturer]. Do not use a mark of omission (...) to indicate such an omission.
  - Note: LC-PCC Policy Statements: Generally do not omit levels in corporate hierarchy.
- Recording dates in more than one calendar (2.6, 2.7, 2.8, 2.9, 2.10)
  - Gives guidelines to follow when dates are represented using different calendars. Only the date preferred by the cataloging agency is core.
RDA Updates – April 2014

• Chapter 6. Two or more parts
  • See additional examples and alternatives: 6.2.2.9.2, 6.14.2.7.2, 6.28.2.3, 6.28.3.4.

• Chapter 6. Recording medium of performance
  • Some instructions were moved from 6.15 (Medium of performance) to 6.28.1.9 (Constructing access points to represent musical works and expressions) and 6.15 was replaced.
    • Each instrument to be recorded individually

• Chapter 6. Preferred title consisting solely of the name of one type of composition
  • Revised: 6.14.2.5
  • New instruction added: 6.14.2.5.1 and 6.14.2.5.2

• Chapter 6. Instructions on liturgical works
  • 6.30.1.5. Revised (6.30.1.5.1-6.30.1.5.5)
RDA Updates – April 2014

Treaties – Chapter 6

• “Treaties, etc.” is no longer the preferred title for a treaty
• The authorized access point will be the preferred title of the treaty
• Date of the treaty now = earliest date a treaty or a protocol to a treaty was adopted by an international intergovernmental body or by an international conference, was opened for signing, was formally signed, was ratified, was proclaimed, etc.
• If there is not a collective title, use: Treaties
• “Protocols, etc.” – will continue to be used
• See York University Bib Blog for a good summary: http://www.library.yorku.ca/cms/bibblog/
Treaties: AACR2 and RDA

- AACR2: Canada. Treaties, etc. 1992 Oct. 7
- AACR2: Israel. Treaties, etc. United States, 1960 September 30
- RDA: Convention between the United States of America and Israel for the Avoidance of Double Taxation of Income and for the Encouragement of International Trade and Investment (1960 September 30)
If there is no source of information identifying the resource as a whole and no source has a title identifying a main or predominant work or content (e.g., a single videodisc containing multiple feature films but with no source of information identifying the resource as a whole), treat the sources of information identifying its individual contents as a collective source of information for the resource as a whole.

2.1.2.3 Resource Issued in More Than One Part

When preparing a comprehensive description for a resource issued in more than one part (e.g., a series of scientific treatises, a periodical, a compact disc set) that is not an unidentifying resource (see 2.1.2.4 RDA), choose one of the following, as appropriate, as the basis for identifying the resource as a whole:

a) If the resource is issued as a set that is unnumbered, or if the numbering does not help to establish an order (e.g., a compact disc set containing an opera, a kit), choose a source of information identifying the resource as a whole, preferring a resource that has a collective title. See categories d) or e) if there is no source of information identifying the resource as a whole.

b) If the identification is based on a collective title that is unnumbered, or if the numbering does not help to establish an order, choose a title that is unnumbered.

c) If the identification is based on a collective title that is numbered, choose a source of information identifying the resource as a whole.

d) If the identification is based on a collective title that is numbered, choose a source of information identifying the resource as a whole, preferring a title that is unnumbered.

e) If the identification of a resource with ordered parts is not based on the first issue or part, make a note for a resource issued in more parts.
First Issue

LC practice: PCC practice. Serials may be issued with terms such as "premier," "sample," or "preview." The term "premier" generally implies the first true issue. Do not, however, base the description on an issue that bears only wording such as "Sample," "Preview," or "Introductory Issue." Such wording generally indicates that the publisher is testing the potential audience for the serial and it is possible that the serial may never be published. Such issues generally do not have numbering. An issue that bears numbering that precedes "1," such as "Vol. 1, no. 0." "Number 0," or "Volume 0," may be treated as the first issue, provided that there is clear evidence that the issue is not merely serving as a sample or introductory issue.

LC practice: The U.S. ISSN Center creates records for preview issues in order to assign the ISSN. If LC later catalogs the serial, the description is based on the first actual issue and a note is given to explain the preview issue.

Electronic Serials That Don't Retain Earlier Titles/Creators

LC practice: PCC practice. If an electronic serial has not retained all of its earlier content (or the earlier creator is removed), base the description on the current presentation. Give information about changes if considered to be significant. Follow these same guidelines if an aggregate title is created.

ANALYTICAL CONTROL

LC practice: LC analyzes and classifies separately all parts of monographic sets and of multipart monographs with the exception of those categories listed in Descriptive Cataloging Manual NS 55.
RDA Changes – More Information

RDA Toolkit

- See section: RDA Update History. This section indicates, by field, changes that have been made. Also available are archived versions of changed parts of RDA.

For a great overview of recent RDA changes, see:
Minitex’s “Digitization, Cataloging & Metadata Mailing” newsletter

- February 2014 and March/April 2014 issues
- [http://www.minitex.umn.edu/Communications/Mailing/](http://www.minitex.umn.edu/Communications/Mailing/)

ALCTS Webinar

- RDA: Revising, Developing, and Assessing
- Presenter: Kathy Glennan, the ALA representative to JSC
- Includes an overview of April 2014 changes
- [http://www.ala.org/alcts/confevents/upcoming/webinar/021914](http://www.ala.org/alcts/confevents/upcoming/webinar/021914)

JSC site: [http://www.rda-jsc.org/working1.html](http://www.rda-jsc.org/working1.html)
OCLC

- WorldCat Credits being phased out
- OCLC Connexion upgrades
- WorldCat MARC Updates
- WorldCat online save file
- WorldCat test records
- WorldCat and FAST
- WorldCat Management System
WorldCat Credits and Incentives

• WorldCat credits are being phased out
• Information from the OCLC Global Council Meeting, November 2013

The Global Council Resolution:

From an earlier Global Council meeting

• Recognizes that the objectives that led to the creation of the Credits Program have been achieved
• Celebrates that participation and contribution are now the norm for members of the cooperative
• Recommends phasing out the Credits Program, beginning July 1, 2014
• Recommends an implementation approach that minimizes the financial impact to members
• Suggests extensive communication with the membership over the next 12 months
Credits Transition Timeline

- **NEXT WEEK**
  - General information
  - The plan, timeline, resources for questions

- **FEBRUARY 2014**
  - Institution-specific
  - Flat-rate credit amount is provided

- **MARCH/APRIL 2014**
  - Institution-specific
  - FY15 quotes, including flat-rate credit amount

- **JULY 2014**
  - All current program participants transitioned

- **JULY 2015**
  - Members who request to defer are transitioned
OCLC Connexion Upgrade

Required: Upgrade to 2.50 or 2.51 by July 31, 2014

- **Connexion 2.50** became available in November 2013
- **Connexion 2.51** was released in April 2014. This version resolves an export problem for some characters (e.g., Latin capital letter D) for libraries that export with MARC-8 character. This is the only difference between 2.50 and 2.51, so if you don’t use these characters, you do not need to upgrade from 2.50 to 2.51

Enhancements:

- New authority indexes available in drop-down box:
  - Cataloging Source
  - Descriptive Conventions. Use “rda” to find RDA records
  - Keyword
  - Notes
OCLC Connexion Upgrade

Enhancements:

• Supports three new scripts in bibliographic records: Armenian, Ethiopic and Syriac.
• GenerateERecord macro updated to better handle Unicode characters.
• New RDA authority workforms for Family and Name Title.
• GenerateAuthorityRecord macro updated to fully recognize the 264 field.
• Under Help, Useful Web Links list is updated to link to OCLC-MARC Records documentation.

OCLC Tech Bulletin 263: OCLC-MARC Format Updates in 2014

- OCLC MARC FORMAT UPDATE 2014 – two phases
- Phase 1:
  - Changes based on MARC 21 Format for Bibliographic Data Update 16 (April 2013)
  - MARC Code List Technical Notices
  - Requests from OCLC users and staff
- Phase 2, later in 2014, will cover Updates from MARC 21 Updates Bibliographic, Authority, and Holdings Data Updates16-18
OCLC Tech Bulletin 263: OCLC-MARC Format Updates – 2014 Phase 1

- Changes to:
  - Nature of Contents (Cont), Nature of Entire Work (EntW), and Format of Music (FMus)
  - 007 Physical Description FF (Videorecording)
  - 250 Edition Statement
  - 510 Citation/Reference Note
  - MARC Code List changes
  - Subject category source codes and Subject heading and Term source codes


- Revision history: https://oclc.org/bibformats/revisionhistory.html#revision

- Slides in Part 2
OCLC Online Save File

- OCLC no longer automatically deletes bibliographic records from the online save file.
- If you lock a master record and save the locked record to the online save file, the master record lock WILL continue to expire in 14 days. Once the lock expires, the record will be retained in the online save file for your usage without the lock. You must continue to resave locked bibliographic records if you wish to extend the master record lock.
- May 2014
FAST

- Faceted Application of Subject Terminology
- Collaboration of OCLC and LC
- Objectives:
  - Compatible with existing metadata
  - Easy to assign
  - Effective retrieval
  - Cost of maintenance
  - Semantic interoperability
Eight facets
- Personal names
- Corporate names
- Geographic names
- Events
- Titles
- Time periods
- Topics
- Form/Genre

OCLC began adding to many WorldCat records in September 2013
- English-language-of-cataloging
- 040 $d OCLCF ; 650 _7 heading $2 fast $0 FAST authority record number
- Started with LC records and then moved on to other sources
FAST (continued)

- http://oclc.org/content/dam/support/worldcat/records/faceted-application-of-subject-terminology.pdf (Enriching WorldCat with FAST)

- http://fast.oclc.org/searchfast/ (searchFAST)

- http://experimental.worldcat.org/fast/assignfast/ (assignFAST)
OCLC WMS

- WorldShare Management Services
  - Save time and money
  - Improve service delivery
- Acquisitions
- Circulation
- Metadata
- Resource Sharing
- Discovery
- Analytics
- License Management
WMS Acquisitions

- One interface for all functions
- Access records, holdings, WorldCat knowledge base and shared vendor data
- Manage physical serials in same acquisitions workflow
  - No separate check-in system
  - Store information in MFHD in local holdings records
- Cooperative serials receiving and publication patterns
- Share vendor information
  - Customize locally
  - Easier electronic ordering and invoicing
- No need to move between multiple systems for formats
WMS Circulation

• Portability of tasks on any device with a web browser
  • Can complete tasks anywhere – in the stacks or beyond your walls
  • Customizable real-time pull lists for user requests
• Interoperability with existing system and other WMS applications
  • Supports SIP2 standard for interaction with 3rd party products and business process systems
• Individual or group options
  • Individual: separate user file, hold policies/priorities, circ and loan policies, control payment and waivers, limit pickup
  • Group: circulate to others in group, single hold queue, scope to local, group or global, see all users but can edit only your library’s
WMS Metadata

- Maintains holdings
- Delivers MARC records for changes (based on profile)
- Automatic maintenance of WorldCat holdings
- Another way to catalog besides Connexion
- Metadata API to streamline/enhance local workflow
  - Can integrate with apps such as MarcEdit
  - Add and enrich your local content
- Register, manage, create and maintain electronic collections using WorldCat Knowledge Base
- Manage DDA collections
WMS Interlibrary Loan

- New ILL service for discovery and delivery of electronic, digital, and print within one interface
- Faster fulfillment of ILL requests
- Option to purchase needed items rather than borrowing
WMS Discovery

- WorldCat
  - Your resources listed 1st in results
  - Built-in link resolution to your full-text resources
  - Built-in A-Z list
  - Visibility
  - Real-time availability
  - Group or consortium view
  - Course reserves/reading lists
  - Remote DB search of all your subscriptions
  - Usage and traffic reports with Adobe Analytics
WMS Discovery (continued)

- Central index of 2,000+ e-content collections
- Mobile-ready interface
- Borrow, buy, or connect to full text
- Tools to showcase and manage local special collections
WMS Analytics/Reports

- Local holdings report
- Dashboards for at-a-glance views
- Other reports at additional cost
WMS License Management

- Store, share and manage licenses centrally
- Searchable repository
- Information about how users are accessing OCLC services
- Statistics from COUNTER-compliant vendors
III/IUG Announcements

• Support phone policy: pass only urgent, system-critical calls to expert teams; expands attention experts can pay to critical issues

• Sierra REST APIs: 1\textsuperscript{st} set released April 28, 2014; available to all Sierra customers free as part of basic API package; will be bundles in a future Sierra 1.2.x release; can install now using a service commitment request
Innovative Users Group

- [http://innovativeusers.org/](http://innovativeusers.org/)
- Documentation is users only
- Can search the email list
- Enhancements
  - Like/dislike
  - Now used by III for enhancements process
Music Library Association

- http://bcc.musiclibraryassoc.org
- Documentation including RDA documentation:
  - Includes: Best Practices for Music Cataloging Using RDA and MARC21 (April 2014)
Music

- RDA NACO Music examples distributed
- MOUG Cataloging Tools (http://www.musicoclcusers.org/catools.htm)
- Best Practices for Music Cataloging, April 2014 (in RDA Toolkit)
- Provisional Best Practices for LCMPT, released May 14, 2014 (Library of Congress Medium of Performance Thesaurus)
  - 382 01 term $2 lcmpt
Catalogers Desktop/ClassWeb

- 2014, Issue 2 (April)
  - Z1 Updates for Undifferentiated Names, Updated examples
- 2014, Issue 1 (February)
  - Classify: an experimental classification web service (OCLC)
  - DDC: Dewey Decimal Classification Glossary (OCLC)
  - DDC: Dewey Decimal Classification Linked Data (OCLC)
  - DDC: Dewey Training Courses (OCLC)
  - DDC: WebDewey (OCLC)
- 2013, Issue 4 (November)
  - DCRM(G): Descriptive Cataloging of Rare Materials (Graphic Materials)
- 2013, Issue 3 (August)
  - BIBFRAME: Bibliographic Framework Initiative
  - BIBFRAME.org
  - RDA Training Resources (CILIP-BL)
BIBFRAME

- Bibframe.org
  - Repository for vocabulary, tools, and shared code
- Bibliographic Framework Initiative
  - Profiles introduction and specification – draft for public review May 5, 2014
  - Authorities specification - draft for public review April 28, 2014
  - Relationships specification – draft for public review April 25, 2014
- BIBFRAME editor available – must register on the BIBFRAME Implementation Register
Library of Congress Vocabularies

- **LCGFT** – LC Genre/Form Terms
  - Remaining projects -- literature, music, religion, and general terms -- expected to be completed in 2014 or early 2015

- **LCDGKT** – LC Demographic Group Terms
  - New vocabulary for demographic information on creators, contributors, and intended audience of resources
  - Projected to be available at the end of 2014
  - Will be used in 385 (Audience Characteristics) and 386 (Creator/Contributor Characteristics) fields in bibliographic and authority records
  - Examples: Americans, Women

- **LCMPT** – LC Medium of Performance (mentioned earlier)
Serials

- CONSER Cataloging Manual
  - Revised draft modules for RDA have been released
  - http://www.loc.gov/aba/pcc/conser/more-documentation.html

- RDA CONSER Standard Record
  - Updated March 2014
  - http://www.loc.gov/aba/pcc/conser/issues/CSR.html
CONSER Cataloging Manual CCM

Revised Draft Modules for RDA:

- **3**: Preferred source and other sources of information (Word, 617 KB)
- **4**: Persons, families, and corporate bodies associated with a work (Fields 100-111 and 110) (Word, 196 KB)
- **5**: Authorized access points for serial works and expressions (Word, 447 KB)
- **7**: Additional authorized access points and variant access points for the title (Fields 210-211) (Word, 148 KB)
- **9**: Edition statement (Field 250) (Word, 376 KB)
- **10**: Publication, distribution, etc. (Word, 627 KB)
- **12**: Series statements and authorized access points (Fields 490 and 8xx) (Word, 156 KB)
- **14**: Linking relationships (Fields 765-787, 580) (Word, 417 KB)
- **15**: Subject headings (Word, 606 KB)
- **16**: When to create a new description (Word, 406 KB)
- **18**: Authorized access points for persons, families, places, and corporate bodies (Word, 621 KB)
- **30**: Direct access electronic serials (Word, 221 KB)
- **31**: Remote access electronic serials (Online serials) (Word, 1.5 MB)
- **34**: Legal serials (Word, 201 KB)
- **35**: Integrating resources (Word, 13 MB)
Name Authority Records

PCC RDA Authorities Phase 3 Task Group

• Appointed: March 2014.
• Phase 1 and Phase 2 involved two computer processes to make automated changes to name authority records. About 500,000 authority records were identified as not appropriate for use under RDA without review, or suitable for use under RDA as-is.
• About 7.5 million AACR2 authority records were left to be reviewed or processed.
• Task Group: plan for the 7.5 million records and, maybe, a re-review of other records since RDA has changed since Phase 1 and 2 were completed.
• Final report due by March 15, 2015.
• http://www.loc.gov/aba/pcc/
What’s New 2014
Part 2: On Your Own

• Read = might be relevant to your cataloging work
• FYI = news
• Resource = read these when you’re looking for training material or cataloging-related information
Resources: Technical Services Law Librarian

- Publication of the American Association of Law Libraries, Technical Services Interest Section and the Online Bibliographic Services Special Interest Section
- Ask an expert: classification and SH questions
  - [http://washburnlaw.edu/tssis/classificationaskanexpert/](http://washburnlaw.edu/tssis/classificationaskanexpert/)
- Blog: TSLL TechScans
  - [http://www.tslltechscans.blogspot.com/](http://www.tslltechscans.blogspot.com/)
Resource: Minitex

• Newsletter: Digitization, Cataloging, & Metadata Mailing
  [Link](http://www.minitex.umn.edu/Communications/Mailing/2014/03March.pdf)
Read: RDA Toolkit Release
July 2013

• Index for AACR2 added
• Workflow editing tool has been upgraded to accommodate RDA Toolkit’s multilingual audience. Can be opened with English, French, or German interface
• Icons indicating the use of a filter on the display of RDA content
• Typos fixed
• Terms added to glossary include: Leaf, Libretto, Lyrics, Page
Read: RDA Toolkit Release
November 2013

- Fast Track changes from JSC, including revisions and additions to the Glossary, Appendix I, and Appendix J
- Update to the help guide
- Revisions and Updates to the RDA element set and MARC-RDA mappings
- No Updates to LC-PCC policy statements
Read: RDA Toolkit Release November 2013 - Examples

- 6.27.4.2, 4th-5th examples
- web site > website
- Appendix I. New term: medium. A person held to be a channel of communication between the earthly world and a world of spirits.
- Appendix J. New terms: Several terms related to cadenzas, incidental music (work), incidental music for (work)
- Glossary. New terms: Cardboard, Ceramic, Charcoal, Coat of Arms, Column, Daguerreotype, Derivative Master, Dye, Genealogical Table, Glass, Gouache, Graph, Graphite, Ink, Ivory, Jigsaw Puzzle, Main Series, Master, Medal, Metal, Mixed Materials, etc.
Read: RDA Toolkit Release - February 2014 - Examples

• 2.7.6.7, 5th-6th paragraphs and examples
  • If no date can be found in the resource or determined from any other source, estimate the nearest year, decade, century, or other interval as precisely as possible. supply the date of approximate date of production ...
  • EXAMPLE
  • probably 1867–1867?
  • 1952–1978 between 1952 and 1978
  • before 1867 not after 1866
Appendix I. New terms:
  • organizer
  • cartographer (expression)
  • minute taker

Glossary. New terms:
  • Acrylic paint, Analog, Centre Track, Digital, Edge Track, Music, Text File, Wax
FYI: MARC Usage in WorldCat

- On the OCLC website you can find statistics for the number of times MARC bibliographic fields and subfields appear in WorldCat records.
- [http://experimental.worldcat.org/marcusage/](http://experimental.worldcat.org/marcusage/)
- If there is a plus sign next to the field (see next slide), there is additional information available. Look for subfields that are links; you can access a list showing the content used in those subfields. Two slides down, you will see a list of terms used in 100 $e.
FYI: MARC Usage in WorldCat - Screenshot

100: Personal Name

You may request a report on a particular subfield.

<table>
<thead>
<tr>
<th>Subfield</th>
<th>Number of Occurrences</th>
<th>Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1,985</td>
<td>3,423</td>
</tr>
<tr>
<td>0</td>
<td>15,003,461</td>
<td>29,192,286</td>
</tr>
<tr>
<td>2</td>
<td>28</td>
<td>53</td>
</tr>
<tr>
<td>5</td>
<td>66</td>
<td>124</td>
</tr>
<tr>
<td>d</td>
<td>167,013,203</td>
<td>1,446,221,205</td>
</tr>
<tr>
<td>e</td>
<td>5,199,035</td>
<td>25,915,574</td>
</tr>
<tr>
<td>j</td>
<td>145,155</td>
<td>565,221</td>
</tr>
<tr>
<td>k</td>
<td>6,199,479</td>
<td>32,950,086</td>
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<tr>
<td>p</td>
<td>51,767,381</td>
<td>597,448,010</td>
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<tr>
<td>t</td>
<td>5,416</td>
<td>8,898</td>
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<tr>
<td>i</td>
<td>5,566</td>
<td>8,125</td>
</tr>
<tr>
<td>h</td>
<td>28</td>
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<td>461</td>
<td>792</td>
</tr>
<tr>
<td>f</td>
<td>4,921</td>
<td>26,754</td>
</tr>
</tbody>
</table>
MARC 100 $e

4209988 Auteur.
376089 author.
261773 zhu.
188256 ed.
125326 zhuan.
114198 comp.
96411 photographer.
61458 bian zhu.
42247 artist.
34327 zhu chi.
32945 editor.
29295 composer.
28857 interviewee.
28644 Author.
22155 praeses.
20981 compiler.
20286 Musique.
17662 zuo.
15209 bian.
14758 Réalisateur / Metteur en scène / Directeur artistique.
13173 dao yan.
11600 author
11494 yuan zhu.
10414 Éditeur scientifique.
10228 bian zhuan.
9906 defendant.
9759 correspondant.
9482 Auteur
9198 printmaker.
Resources: OCLC

• OCLC webinars:
  • OCLC Cataloging and Metadata site
  • http://www.oclc.org/services/metadata.en.html

• OCLC Research Activities:
  http://www.oclc.org/research/activities.html
Resources: OCLC

OCLC Connexion Browser Guides updated

- Edit Authority Records
  - Updated May 2014

- Edit Bibliographic Records
  - Updated May 2014
FYI: OCLC Releases WorldCat Works as Linked Data

• OCLC has made 197 million bibliographic work descriptions—WorldCat Works—available as linked data. This will improve discovery of library collections through a variety of popular sites and Web services such as Google, Wikipedia, and social networks.

• Announcement: April 2014
Read: WorldCat and MARCEdit

• “MarcEdit ... includes new functionality that will give OCLC member libraries the ability to contribute and enhance their bibliographic and holdings data within WorldCat while using MarcEdit. The new functionality will provide catalogers with a new way to interact with their OCLC data, as well as provide another option for libraries looking to streamline their metadata workflows. The new functionality in MarcEdit is made possible by leveraging the WorldCat Metadata API.”

• “MarcEdit also uses two additional OCLC Web Services, notably the FAST service to generate subject headings and Classify, to provide classification recommendations based on a control number.”

• November 2013

Resources: OCLC Webinars

- [http://oclc.org/events/webinars.en.html](http://oclc.org/events/webinars.en.html)
- Research
  - [http://oclc.org/research/events/webinars.html/](http://oclc.org/research/events/webinars.html/)
- Metadata
  - [http://www.oclc.org/services/metadata/presentations.en.html](http://www.oclc.org/services/metadata/presentations.en.html)
- Connexion tutorials
Resource: OCLC Webinar

• RDA Implementation Experiences: An OCLC webinar – October 2013
  • https://www.oclc.org/events/2013/rdawebinar101613.en.html

• Speakers:
  • Erin Stalberg, Director of Discovery and Access Services at Mount Holyoke College
  • Margaret Maurer, Head, Metadata and Cataloging at Kent State University
Read: New OCLC Macros

- **ClearELvl3Workform**
  - This macro clears candidate fields from an Encoding Level 3 bibliographic record and replaces them with workform prompts. The prompts are a blend of two sets of workforms—AACR2 versus RDA.

- **GenerateERecord**
  - This macro creates a workform to represent an online version of an item based on the print, microform, or another format version of a bibliographic record for the same title. (Note: The GenerateERecord macro replaces the following two OCLC macros: GenerateESerial and GenerateESerialCONSER.)
Read: OCLC Authorities

- Sept 2013
  - Issues introduced in the previous install were resolved
  - Resolution of the separate entries for headings that contain different and/or no terminal punctuation
    - Shakespeare, William, $d 1564-1616
    - Shakespeare, William, $d 1564-1616.
    - Shakespeare, William, $d 1564-1616,
  - Source: Technical Services Law Librarian, v. 39, no. 2
Nature of Contents (Cont)
- Code = x (Other reports) converted to t (Technical reports)
Nature of Entire Work (EntW)
- Code = x (Other reports) converted to t (Technical reports)
Format of Music (FMus)
- Definition changed. One-character code that indicates the format of a musical composition
  - a = Full score
  - z = Other
  - l = Score
Read: OCLC Tech Bulletin 263: OCLC-MARC Format Updates – 2014 Phase 1

- 007 Physical Description FF (Videorecording)
  - $e = n is obsolete; converted to code u (Unknown).
- 250 Edition Statement
  - Now repeatable.
  - New $3 (Materials specified).
- 510 Citation/Reference Note
  - VIS: First indicator = [blank] is obsolete, except in pre-AARC2 visual materials records.
  - Others will be converted to first indicator = 3 (Location in source not given).
Read: OCLC Tech Bulletin 263: OCLC-MARC Format Updates – 2014 Phase 1

• MARC Code List changes
  • 034 $2 Cartographic data source codes (Bib and Authority).
  • 040 $e Description convention source codes (Bib and Authority).
• New Genre/Form codes and Term source codes in $2
  • Authority: 040, 336, 755, 785.
  • Holdings: 337, 338.
• 042 $a MARC authentication action codes (Bib and Authority).
• Musical instrumentation and Voice Code source codes
  • Bib: 048 $2, 382 $2.
  • Authority: 382 $2, 762 $2.
Read: OCLC Tech Bulletin 263: OCLC-MARC Format Updates – 2014 Phase 1

- Subject Category Source Code
  - Bib: 072 $2
  - Authority: 072 $2, 073 $2
- Subject heading and Term source codes
  - Bib: 033 ‡2, 257 ‡2, 380, 381 ‡2, 518 ‡2, 600-651, 654, 662 ‡2, 751, 752 ‡2
  - Authority: 370, 372, 373, 376, 380, 381 ‡2; 700, 710, 711, 730, 751 ‡2
LC Classifications Schedules and Subject Headings are now available for download

- LC classification schedules
  - [http://www.loc.gov/aba/publications/FreeLCC/freelcc.html#About](http://www.loc.gov/aba/publications/FreeLCC/freelcc.html#About)
- LC subject headings, genre/form terms, children’s subject headings, free-floating subdivisions, and introduction to LCSH
  - [http://www.loc.gov/aba/publications/FreeLCSH/freelcsh.html#About](http://www.loc.gov/aba/publications/FreeLCSH/freelcsh.html#About)
- The summary of Decisions from LC Policy and Standards Division (PSD) are interesting and worth looking at occasionally
Read: LC Descriptive Cataloging Manual - Section Z1

- Most of the manual covers internal procedures used at the Library of Congress. Of broader interest is Section Z1 on Name and Series Authority Records

- 2014 Update Number 1 (February 2014)
Read: LC Descriptive Cataloging Manual – Section Z1 Updates

• 024 - new field in name and series authority records
  • 024 – Other Standard Identifier
  • ISNI, ORCID

• 100 - Heading - Personal Name. Updated to remove instructions on the fixed field coding of fictitious names and the need to add a 667 note.

• 382 – Medium of Performance. Updated to provide the best practices for use of the field as agreed to by the Music community.
Read: LC Descriptive Cataloging Manual – Section Z1 Updates

• 4XX - See From Tracings. Updated. Gives additional guidance related to variant personal names.
  • Add 378 for fuller form of name instead of some variant names
  • 378 __ $q David Walter
• 5XX - See Also From Tracings. Updated. Gives additional guidance about references.
  • 5xx may conflict with a 5xx if both 5xx fields have a relationship designator in $i and those are different.
• 500 - See Also From Tracing - Personal Name. Updated.
  • Discontinue the practice of changing a 4XX to a 5XX to resolve a conflict between a variant name (400) and an authorized access point (500). Now make an addition to either the 400 or 100 to resolve the conflict.
Resources: Library of Congress Catalogers Learning Workshop

- [http://www.loc.gov/catworkshop/](http://www.loc.gov/catworkshop/)
- Training material for
  - RDA
  - Subject cataloging
  - Medical subject cataloging
  - Name and title authorities
  - Series authorities
  - Digital library
Resources: RDA Training Materials

- Library of Congress

- British Library
  - [http://www.bl.uk/bibliographic/cataloguing-training.html](http://www.bl.uk/bibliographic/cataloguing-training.html)

- Australian Committee on Cataloguing
  - List of training from various places
Resources: Innovative Interfaces (III)

III CSDirect
- http://csdirect.iii.com/
- Documentation

Innovative Users Group (IUG)
- http://innovativeusers.org/
- Members only: Documentation and conference presentation slides
- Can search the email list
Read: MARC Updates

• Update 17 – September 2013
• Update 18 – April 2014

• Changes related to these Updates have not been incorporated into OCLC Connexion yet.
Read: MARC Bibliographic Update 17

• New: $q$ for qualifying information in
  • 015 – National Bibliography Number
  • 020 – International Standard Book Number
  • 024 – Other Standard identifier
  • 027 – Standard Technical Report Number

• 020 __ 0914378260$p$pbk.$q$v. 1$c$c$5.00
• 020 __ 0877790019$q$black leather
• 024 __ M570406203$q$score$q$sewn$cEUR28.50

[Proposal 2013-09]
Read: MARC Bibliographic Update 17

- New $7 in 800, 810, 811, 830
  - $7 Control subfield with two characters
    - First = Type of record
    - Second = Bibliographic level
  - 830 _0 Fasteners $v 5 $7 am
    - a = Language material
      - Same codes as used in Leader/06
    - m = Monograph/item
      - Some codes as used in Leader/07
- [Proposal 2013-08]
Read: MARC Bibliographic Update 18

- 588 – New indicator values
  - First indicator
    - [blank] = No information provided
    - 0 = Source of description
    - 1 = Latest issue consulted

588 0_   Vol. 2, no. 2 (Feb. 1984); title from cover.
588 1_   Vol. 5, no. 1 (January 1987)

[Proposal 2014-01]
Read: MARC Bibliographic Update 18

- 007 sound recording
  - 04 Configuration of playback channels
    - q = Quadraphonic, multichannel, or surround
    - Was: Quadraphonic
Read: MARC Bibliographic Update 18

- 347 - Digital File Characteristics
  - $f = Encoded bitrate
  - Was: Transmission speed
  - 347 _ _ video file $b DVD video $e region 4 $2 rda
- Meeting name (110, 111, 610, 611, 710, 711, 810, 811)
  - $c (Location of meeting) is now repeatable
  - 111 2_ World Peace Conference$n(1st :$d1949 :$cParis, France; $cPrague, Czechoslovakia)
- [Proposal 2014-02]
Read: MARC Authority Update 17

• New $q in 020 and 024

• 020  International Standard Book Number
• 024  Other Standard Identifier

• 020 _ _ 0882335065$qv. 2$q jacket

• [Proposal 2013-09]
Read: MARC Authority Update 18

- $c Location of meeting changed to “repeatable” in 110, 111, 410, 411, 410, 411, 710, 711

- 111 2_ World Peace Conference$n(1st :$d1949 :$cParis, France; $cPrague, Czechoslovakia)

- [Proposal 2014-02]
Read: MARC Holdings Update 17

- New $q for qualifying information in
  - 020 (International Standard Book Number)
  - 024 (Other Standard Identifier)
  - 027 (Standard Technical Report Number)

- [Proposal 2013-09]

- No changes in Holdings Format for Update 18
Read: MARC Codes Updates

MARC Codes List for Countries
• Code caption changed
  • cv = Cabo Verde
  • Was = Cape Verde

MARC Codes for Languages
• Change to a collective code assignment
  • kro = Krahn
  • Previous code was nlc
Resources: Online Audiovisual Catalogers (OLAC)

- Upcoming conference in Kansas City, October 23-26, 2014!

- OLAC website: [http://olacinc.org/drupal/](http://olacinc.org/drupal/)

- Newsletters are freely available online

Resources: Regional Organizations

Ohio Valley Group of Technical Services Librarians (OVGTSL)
• Conference presentations are online:
  http://ovgtsl2014.wordpress.com/about/past-conferences/

• http://netsl.wordpress.com/
• Conference presentations are available online
• The April 2014 conference included sessions on streaming video, introduction to technology, licensing and copyright, ERM, MARCedit, Encoded Archival Context, etc.
Resources: ALA Conference Presentation Slides Online

ALCTS Metadata Interest Group
• http://www.ala.org/alcts/mgrps/ig/ats-nrmc

LITA/ALCTS Authority Control Interest Group (ACIG)
• http://www.ala.org/alcts/mgrps/camms/grps/ats-dgacig
• Presentation slides: http://connect.ala.org/node/65335

ALCTS Heads of Cataloging Interest Group
• Presentation slides: http://connect.ala.org/node/66155
• January 2014 slides: http://connect.ala.org/node/215716

ALCTS = ALA Association for Library Collections and Technical Services
LITA = ALA Library and Information Technology Association
Resources: ALA

ALCTS Continuing Education Committee

- [http://www.ala.org/alcts/confevents](http://www.ala.org/alcts/confevents)
- Webinars – freely available after five months
- E-Forums (email discussions) – discussions are posted online
- The group also offers several web courses (not free)
Technical Services Directors of Large Research Libraries IG

- “Big Heads”
- http://www.ala.org/alcts/mgrps/ig/ats-dgbh
- Round robin reports about activities at the members’ libraries are posted
- Membership is limited to the technical services directors of:
  - The 24 largest ARL university libraries (including the Canadian libraries), a non-ARL university library, two public libraries which meet the same criteria as the 24 largest ARL research libraries, and the three national libraries in the U.S.
Read: BIBCO (LC Program for Monographic Cataloging)

PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile  - updated April 2014


• Word version also: [http://www.loc.gov/aba/pcc/bibco/index.html](http://www.loc.gov/aba/pcc/bibco/index.html)

• Useful document. Includes the fields that are RDA core and PCC core. Gives RDA rule numbers and MARC tags, includes notes.
Resources: BIBCO

- BIBCO Participants’ Module, third edition, now available.
- Useful: Appendix B: Selected Cataloging Resources.
- [http://www.loc.gov/aba/pcc/bibco/doc-Updates.html](http://www.loc.gov/aba/pcc/bibco/doc-Updates.html)
Read: LC Subject Headings

- Channel Islands
  - Channel Islands is not a jurisdiction
  - The name authority records was cancelled and a subject heading was established
  - The name of the bailiwick is the larger place in the local place
    - Saint Hellier (Jersey)
- Calcutta name change
  - Calcutta is not valid as a subject heading. Use Kolkata (India)
  - Change in 2001, but this was mentioned on the Cataloguing Aids blog in January 2014
  - Found it in use in MOBIUS catalog (and MERLIN)
LC subject headings for fictitious characters will be cancelled and re-established in the name authority file. This will be an ongoing project.

- Example:
  - The CatalogingRules blog reported in October 2013 that Sherlock Holmes was been re-established in July 2013
    - Gone: Holmes, Sherlock (Fictitious character)
    - New name authority record: Holmes, Sherlock
Read: Fictitious Characters, Etc.

• LC project: Searching for personal name authority records containing a 368 field indicating that the entity is a fictitious character. These will be cancelled.

• Before setting up a name authority record for a fictitious character, search for an LC subject heading and request a cancellation.

Family Names

• Family Names used as subjects are still established in LCSH

• More information
Read: Library of Congress Classification

- **KIA-KIK:** Law of Indigenous Peoples in North America, specifically Canada and the United States
  - New. *Appeared in ClassWeb the weekend of May 31-June 2.*
  - Tribal law
- **KF:** Law of American Indians
  - Expansion of KF8200 and KF8578 underway. Will begin to appear during the week of June 2, following the addition of KIA-KIK in ClassWeb.
  - Federal law
Read: Newly Approved Romanization Tables

- Romanian (in Cyrillic) Romanization (May 2014)
- Coptic Romanization (January 2014)
- Rusyn / Carpatho-Rusyn Romanization (October 2013)
- Bulgarian, Serbian, and Macedonian Romanization (August 2013)
- Tamashek Romanization (July 2013)
- Revised:
  - Urdu (in Arabic Script), Pushto, and Sindhi (in Arabic script) Romanization (June 2013)

- http://www.loc.gov/catdir/cps0/roman.html
Resource: Core Competencies for Electronic Resources Librarians

- The North American Serials Interest Group (NASIG) has posted a document listing core competencies for electronic resources librarians. It was approved 2013.

- [http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=310&pk_association_webpage=1225](http://www.nasig.org/site_page.cfm?pk_association_webpage_menu=310&pk_association_webpage=1225)

- Of interest to catalogers
  - 1.3. The ability to apply the principles involved in the organization and representation of recorded knowledge and information ...
  - 1.4. Experience with bibliographic and other utilities used to record that metadata, standards such as CONSER, and continuing resource cataloging principles; awareness of emerging best practices related to RDA/FRBR.
Resources: North American Serials Interest Group (NASIG)

- NASIG 2014 Conference presentations
  - [http://www.slideshare.net/NASIG/tag/nasig2014](http://www.slideshare.net/NASIG/tag/nasig2014)
- Basic Serial Cataloging
  - [http://www.slideshare.net/NASIG/basic-serials-cataloging-workshop-handout](http://www.slideshare.net/NASIG/basic-serials-cataloging-workshop-handout)
- Newsletters are freely available online
  - [http://tigerprints.clemson.edu/nasig/](http://tigerprints.clemson.edu/nasig/)
Resources: Music OCLC Users Group (MOUG)

- MOUG 2014 Conference (February 2014)
- Etiquette for replacing bibliographic records panel
- RDA and authorities panel
- Lightning talks on RDA and music manuscript description, pseudonyms, cataloging reel-to-reels and 78s, pop and rock in RDA, starting RDA cataloging.
- Newsletters are freely available one-two years after publication [http://www.musicoclcusers.org/newsletter.html](http://www.musicoclcusers.org/newsletter.html)
Resources: Government Printing Office (GPO)

• Cataloging Guidelines
  • [http://www.fdlp.gov/catalogingandclassification/link-item](http://www.fdlp.gov/catalogingandclassification/link-item)
  • Name authorities, Subject cataloging, Other metadata schemes: Dublin Core, ONIX

• Cataloging and classification
  • Serial Set publications, digital reproductions, SuDocs

• News & Events
Resource: International Federation of Library Associations and Institutions (IFLA)

• Launched its own institutional repository. IFLA is the group that oversaw the writing of FRBR, international cataloging principles, etc.

• IFLA Library is IFLA's institutional repository. It was launched Summer 2013.

• Includes IFLA’s digital resources

• http://library.ifla.org/