# Minitex

**A Publication of the Minitex Digitization, Cataloging & Metadata Education Unit**

# DIGITIZATION, CATALOGING & METADATA MAILING

## November

Cataloging & Metadata

## RDA Notes
*Mark K. Ehlert, Minitex/DCME*

### December RDA Toolkit Update

The Dec. 11 update to the RDA Toolkit will see at least one major change: inclusion of the first set of RDA chapters rewritten for improved readability.

One of the complaints that catalogers leveled at RDA during the national cataloging test in late 2010 was its opaque language. As part of their final report, the U.S. RDA Test Coordinating Committee measured the RDA text against other cataloging manuals and found that it ranked lowest among them for readability.[1] The report went on to quote a number of negative reactions to the text, with some catalogers finding it "vague and circular," "disorganized," and "complicated." [2]

To allay these concerns, the powers-that-be (including ALA Publishing, the body responsible for issuing RDA) resolved to push at least some of RDA's chapters through a "re-wording" process. They were careful not to use the term *rewrite* when describing this method, as the objective is not to change the outcome of the cataloging rules, only their terminology and manner of phrasing: shorten long sentences, change grammatical structures, alter the layout of lists for better legibility, and so forth. [3] This is the same approach ALA Publishing is taking with their translations of RDA into Chinese, French, German, and other languages. In a sense—and not without some irony given the aspirational "written in plain English" goal for the new cataloging code[4]— RDA is being "translated" into English.

Chris Oliver, librarian at McGill University Libraries (Montreal, Quebec), has been tasked with making these revisions. [5] The first five chapters chosen for this makeover are:

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1 *See p. 3 and p. 79ff. of the report:* http://z.umn.edu/aj5

2 *See p. 84-85 of the report above.*

3 *Further details are available here:* http://z.umn.edu/aj6

4 *Under the section "Long Term Goals of RDA:" "3. RDA will be developed as a resource description standard that is: … Written in plain English, and able to be used in other language communities." Source:* http://www.rda-jsc.org/stratplan.html

5 *The RDA Toolkit blog has the original announcement:* http://www.rdatoolkit.org/blog/288. *If her book "Introducing RDA" is any indication, Oliver's choppy writing style (in my opinion) may well suit the simple "do this, do that" disposition a cataloging rulebook requires.*

- **Chapter 6 (Identifying Works and Expressions)**: instructions on creating headings for works (e.g., original titles) and expressions (e.g., translations) as well as authority records for works and expressions

- **Chapter 9 (Identifying Persons)**: instructions on creating headings for persons as well as authority records for persons

- **Chapter 10 (Identifying Families)**: instructions on creating headings for families as well as authority records for families

- **Chapter 11 (Identifying Corporate Bodies)**: instructions on creating headings for corporate bodies (e.g., government agencies, bands, companies, ships) as well as authority records for corporate bodies

- **Chapter 17 (General Guidelines on Recording Primary Relationships)**: instructions on tying together work-, expression-, manifestation-, and item-layer information in bibliographic records, which was roundly derided as the most difficult chapter in RDA to make sense of.

According to the original announcement, experience with re-wording these chapters will inform future work with other chapters in RDA.

On a related note, those owning the print version of RDA will finally see a new set of pages for their binders come December.  This accumulation, according to an ALA Publishing representative, will include all rule updates and changes made through December as well as whatever re-worded chapters are available at that time. [6] It's unknown as of this writing whether the RDA Print update will be available for free or subject to a charge.

## RDA Construction Season Continues

No set of cataloging rules is etched in stone.  As with the old ALA rules and AACR, RDA undergoes revision now and again—particularly today, in its still-blossoming form.  The Joint Steering Committee for Development of RDA (the JSC) is the body responsible for cultivating and maintaining the RDA text.  The JSC gathered for a meeting in Chicago, in early November to go over rule change proposals and discuss wider issues with the new cataloging code.  Whatever revisions and enhancements come out of this meeting should appear in RDA by April 2013 at the latest.

For those "cataloging geeks" who are interested in jumping down the rabbit hole, John Attig, one of the JSC members, has summarized the Committee's work on his

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6  This announcement was part of ALA Annual's RDA Update Forum held in late June 2012: http://www.rdatoolkit.org/blog/398

blog:

http://z.umn.edu/aj3

The posts begin with the most recent, then work backward in time.  The numbering scheme he uses to label the proposals matches that for the documents on the JSC website:

http://www.rda-jsc.org/workingnew.html

To find the original proposals, look for those earmarked "6JSC/*acronym*/*number*" (e.g., 6JSC/ALA/20).  I recommend using your browser's Find function due to the large number of documents indexed on that web page.  Most of the remaining documents are responses by various constituencies to these proposals (e.g., 6JSC/ALA/20/LC response).

## ALCTS Webinar Videos on RDA

The Association for Library Collections & Technical Services (ALCTS), a section of the American Library Association, has been doing their part in the continuing education arena to provide informational webinars on various RDA topics.  These webinars, which were recorded when presented live, are available through the ALCTS website:

http://www.ala.org/alcts/confevents/upcoming/webinar/cat

The more recent recordings are only accessible for a fee; those older than 90 days are freely available for viewing.  ALCTS also archives these videos on their YouTube channel "ALCTS Continuing Education:"

http://www.youtube.com/user/alctsce ■

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Cataloging & Metadata

## New:  Upper Midwest Linked Data Interest Group

*Sara Ring, Minitex/DCME*

Created by Sara Ring (Minitex) and Sarah Weeks (St. Olaf College), the *Upper Midwest Linked Data Interest Group* is for staff working in libraries, archives, and museums who wish to share and discuss ideas about linked data projects, to propose

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organized events or informal meet ups, and to share continuing education opportunities:

https://groups.google.com/d/forum/upper-midwest-linked-data-interest-group

Only members of the group may post, but it is open to anyone to view the discussions.  If you are interested in joining the group, contact Sara Ring (ring0089@umn.edu) or Sarah Weeks (weekss@stolaf.edu), and one of us can add you.

If you have never used Google Groups, it works like an online forum, but you can choose to receive email notifications when someone posts (and change the frequency of the notification in the "My membership" section).

So far, there has been one very active discussion regarding a linked data project under the thread "Current (And Future) Linked Data Projects."   There is plenty of room for new discussion threads!  ■

Cataloging & Metadata

## Attention Cataloger's Desktop Users

The following message includes information about access to AACR2 via Cataloger's Desktop after March 31, 2013.  This notice was published originally on the LIbrary of Congress Cataloging Distribution Service website:

http://www.loc.gov/cds/notices/AACR2-11-1-2012.pdf

In January the Library of Congress announced that it would transition from AACR2 (Anglo-American Cataloguing Rules, second edition) to RDA (Resource Description and Access) on March 31, 2013.  AACR2 is currently available via LC's web-based cataloging documentation subscription service, Cataloger's Desktop, as well as through RDA Toolkit. In keeping with LC's decision to switch from AACR2 to RDA, Cataloger's Desktop will simultaneously change how access to AACR2 is provided.

On April 1, 2013, if you subscribe to both Cataloger's Desktop and RDA Toolkit (which includes an online version of AACR2), you will continue to have access to AACR2. If you subscribe to Cataloger's Desktop but not to RDA Toolkit and want online access to AACR2, you will need to establish an RDA Toolkit subscription at:

http://www.rdatoolkit.org

To ease the impact of the transition, current Cataloger's Desktop subscribers will get an additional month for FREE upon subscription renewal. That's 13 months access to Cataloger's Desktop at the regular annual subscription rate. This offer is valid only for subscription renewals from Nov. 1, 2012, through Oct. 31, 2013.

Still have questions? See our FAQ page:

http://www.loc.gov/cds/desktop/web-faqs.html#QAs-RDA

Or, call Customer Service toll free at 1.855.266.1884.  ■

Digitization & Preservation

## Virtual CONTENTdm User Group Meeting Summary

*Sara Ring, Minitex/DCME*

The first global virtual CONTENTdm user group meeting on Nov. 7, 2012 was a success!  The event was hosted by Minitex and OCLC, with additional sponsorship from OCLC to underwrite the cost.  Here is the CONTENTdm Virtual User Group Meeting by the numbers:

272    number of individual registered attendees

480    number of registered attendees with group attendance factored in

8    number of international attendees (from Canada, Egypt, Spain, and the Canary Islands)

94    number of tweets sent out with the hashtag #CDM12 on Nov. 7 according to topsy.com

99    number of attendees who completed online survey

5    number of sessions

5    number of minutes allotted to each of the 8 lightning round presenters

6    number of hours in 2012 Virtual CONTENTdm User Group Meeting from start to finish (10:00 AM to 4:00 PM)

0    number who reported not getting in to the meeting

The recordings and handouts from the meeting are available on the Minitex website:

https://www.minitex.umn.edu/Events/Conferences/Highlights/2012/ContentDm

They will also be accessible on the CONTENTdm User

Support Center (Click on "Training and Event" tab, then "2012 User Group Meetings"):

http://www.contentdm.org/USC

Here are a few quotes from the evaluations:

*Well done! This was the most useful and interesting online meeting I've ever attended.*

*The programming blew me away. I have been around a long time and frequently attend Webinars that provide little new in the form of take-away. This conference provided some real education on cutting edge topics, and the lightning round was fun with some projects we would like to duplicate.*

*The virtual format provides me the opportunity to watch everything and multi-task during sessions that aren't relevant to my situation. You know it's a good session however when you give the presentations all of you attention and stop multi-tasking.*

*The most positive aspect of a virtual conference for me was being able to set up a location for me and my colleagues to watch the different sessions together and discuss ideas/questions we had during and immediately following the presentation.*

As Co-Chair of the planning committee, I had a tremendous amount of help from an excellent group!  If you have an interest in helping to plan next year's global virtual CONTENTdm user group meeting, contact me, Sara Ring (Contact information at the end of this *Mailing*).  ■

Digitization & Preservation

# Viewshare:  Visualizing Digital Collections and More

*Sara Ring, Minitex/DCME*

The Nov/Dec issue of *D-Lib Magazine* featured an article about Viewshare (http://www.dlib.org).  If you have not heard about it, Viewshare is an open source platform for creating custom views of a digital collection.  The

views include timelines, interactive maps, facets, and tag clouds.  Developed by the National Digital Information Infrastructure and Preservation Program at the Library of Congress,  it is free to cultural heritage institutions (libraries, archives, museums, historical societies).   Visit the website to sign up for a free account:

http://viewshare.org

Though Viewshare's primary function is a platform for generating custom views, it can also be used as a testbed for development.  The article featured in the latest issue of *D-Lib Magazine*, "Viewshare and the Kress Collection: Creating, Sharing, and Rapidly Prototyping Visual Interfaces to Cultural Heritage Collection Data," discusses a specific use case that fits that scenario.  The article states in the introduction:

> *"…digital collections are often built around the same path-based information-seeking behaviors that characterize online public access library catalogs… such directed searching often fails to complement the ability to iteratively explore and compare data trends, and engender the accidental wisdom that comes from visualizing collections in new ways…"*

Though we (staff of libraries, archives, museums) *might* have the tools to develop visual interfaces that allow for exploration as mentioned above, these interfaces are not easy to develop and it is difficult to know what will be valuable once the data is visualized.  Viewshare can help with these issues.

The "use case" piece of the article focused on the Samuel H. Kress Collection, which began at the National Gallery of Art's Gallery Archives as a relational database containing information about the paintings, sculptures, and more from the Italian Renaissance period (collected over three decades by Samuel H. Kress and his brother, and the Samuel H. Kress Foundation).  Once the data was imported into ViewShare, one could use it to "…tell the wider story of the collection as a body of objects with a shared history, making otherwise hidden data patterns evident…"  The article points out numerous examples of this in ViewShare screen captures.

Not only did Viewshare allow for new interpretations of the data, it also helped with testing web requirements as the database will likely be accessible via a web portal at some point.  It allowed staff to easily test out different presentations of the data, recognize where the descriptive metadata could be improved, and helped staff visualize how future content management systems might work with the existing information they have in the collection.  You

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can access and read the full article in the Nov./Dec. issue of *D-Lib Magazine*:

http://www.dlib.org ■

## Digitization & Digital Preservation

# Upcoming Online Training Opportunities

*Sara Ring, Minitex/DCME*

### Northeast Document Conservation Center

The NDCC, based in Andover, ME, is offering a few webinars from their "Fundamentals of Digitization" series. The cost of each webinar is $95.00.  Visit their website for more information:

http://www.nedcc.org/education/webinars.calendar.php

### Handling Collection Materials During Digitization

*Tuesday, Nov. 27, 1-3 p.m. (Central)*

Digital reformatting improves access to your collections but shouldn't endanger the physical condition of the originals. This webinar will introduce participants to safe handling techniques for the digitization of collection materials.

Techniques include:

- Removing fasteners
- Handling fragile bound volumes
- Handling very brittle materials
- Handling photographs and negatives

Appropriate digitization equipment will be discussed as will questions to ask vendors when forming a new working relationship.

**Who should attend?**
This introductory webinar is designed for those who handle any paper-based collection material that is being digitally reformatted.

### Digital Disaster Planning

*Tuesday, Dec. 4, 1-3 p.m. (Central)*

Disaster plans are just as important for digital collections as they are for analog collections. This webinar will introduce the elements of a disaster plan for digital collections and the issues to be considered when conducting a risk assessment.

**Who should attend?**
This introductory webinar is designed for those who are interested in working on a disaster plan for their digital collections. ■

## OCLC

# OCLC Evaluating Cost Sharing Models

*OCLC; edited*

There was a message posted to the OCLC-CAT listerv on Nov. 8 on behalf of Cathy De Rosa (OCLC Vice President for the Americas and Global Vice President of Marketing) that affects all members of the OCLC Cooperative.   The message has been reposted below for those who do not subscribe to the OCLC-CAT listserv.

*An OCLC Global Council Cost Sharing Models Task Force was established in 2011 to evaluate cost sharing models currently in place for members of the cooperative. The task force published its final report in June, 2011.  The report can be found on the OCLC website under Global Council Resources:*
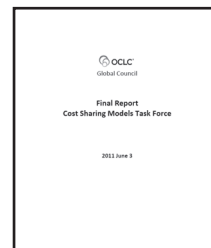
*http://www.oclc.org/us/en/membership/resources/default.htm*

*Here's the direct link to the PDF of the final report:*

*http://www.oclc.org/us/en/councils/documents/csmtf-final-6-3-2011.pdf*

*One of the recommendations was as follows:*

*OCLC Management should conduct an analysis of the current system of financial credits for contribution and create an updated Incentives Program. Such an analysis should take into account the original purpose of credits, cost of administering the system, potential for providing incentives for new or different activities, applicability across regions, and provide projections of financial impact on OCLC and members.  Global Council should*

*discuss these findings and provide feedback on any potential changes prior to implementation.*

*In light of this recommendation, Global Council established an Advisory Group on Incentives, made up of representatives of 12 member libraries. The aim of the Advisory Group is to gather input and feedback from OCLC members via regional meetings and focus groups. The group aims to provide a recommendation to Global Council and OCLC management by the April 2013 Global Council meeting.*

*The focus group discussions currently underway are exploring a variety of questions with members, including the value of the current incentives program, how it impacts decision-making at the library, and how the program should be changed to reflect the changes in library management, and the changing needs of OCLC member libraries.*

*No decisions have been made at this time, and any changes that are made will take into account the input and feedback of member libraries. We will make sure that these and other discussions on OCLC-CAT are shared with the Advisory Group.*

The Credits Advisory Group discussed the future of cataloging credits at a recent OCLC Global Council meeting on Nov. 5-7 in Dublin, Ohio.  Final recommendations are to be made to Global Council and OCLC management by next April.  Visit the following url to watch video of this segment of the meeting:

http://z.umn.edu/apr

Here's a quick list of the other topics discussed at the most recent OCLC Global Council meeting.

- Global Council President's Report
  Chew Leng Beh, Global Council President

- OCLC President's Report
  Jay Jordan, OCLC President and CEO

- OCLC Board of Trustees Report
  Sandy Yee, Chair, OCLC Board of Trustees

- Americas Regional Council Update
  Barbara Preece, ARC Chair

- Bylaws Committee report
  Barbara Preece, ARC Chair

- Logistics for the April Council Meeting
  George Needham, VP, Global and Regional Councils

Pam Bailey, Member Advocate

- News from EMEARC
  Anja Smit, Chair, EMEA Regional Council

- Heading for Holland!
  Anja Smit, Chair, EMEA Regional Council

- Linked Data Radical Change?
  Richard Wallis, OCLC Technology Evangelist

- Wikipedians and Librarians: two communities separated by common goals
  Merrilee Proffitt, Senior Program Officer
  Max Klein, Wikipedian in Residence, OCLC Research ■

OCLC

## Transforming Discovery and Resource Sharing with OCLC

*OCLC; edited*

OCLC WorldShare Interlibrary Loan will replace WorldCat Resource Sharing in 2013, helping library staff and users obtain the resources they need from libraries worldwide even more quickly and easily, and take advantage of the WorldShare Platform.  OCLC is also bringing the user-friendly features of WorldCat.org together with the precision searching of FirstSearch, valued by library staff and expert researchers, to provide new expert-level features.  From the Oct. 30 recorded webinar, decribed below, you will learn about plans for new functionality, timelines for migration, and how to start thinking about the transition in your library.

Watch the "Transforming Discovery and Resource Sharing with OCLC: FirstSearch, WorldCat Resource Sharing and More" webinar recording:

http://bit.ly/NeESgK

Or, you could sign up to attend a live webinar on Jan. 16, 2013 here:

http://registration.oclc.org/reg/?pc=DiscoveryDelivery011613 ■

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## Upcoming OCLC Training from Minitex

Below is a list of upcoming Connexion and CatExpress Training offered by Minitex.  Remember that you can access the full OCLC training curriculum via the OCLC Training Portal:

http://training.oclc.org/training

### Connexion Client Module 2:  Basic Bibliographic Searching

https://www.minitex.umn.edu/Training/Details.aspx?SessionID=387

Wednesday, Dec. 12, 1:00 PM - 3:00 PM

### Connexion Client Module 5:  Automation and Customization

https://www.minitex.umn.edu/Training/Details.aspx?SessionID=443

Wednesday, Jan. 16, 1:00 PM - 3:00 PM

### Copy Cataloging with CatExpress

https://www.minitex.umn.edu/Training/Details.aspx?SessionID=244

Wednesday, Dec. 5, 1:00 PM - 2:30 PM

Friday, Jan. 11, 1:00 PM - 2:30 PM

Monday, Feb. 11, 1:00 PM - 2:30 PM

## Minitex Digitization, Cataloging & Metadata Mailing Contact Information

Digitization, Cataloging & Metadata Education (DCME)
612-624-4002, 800-462-5348, mino@umn.edu
Mark Ehlert, Sara Ring, Carla Dewey Urban
*Services and resources pertaining to cataloging and metadata, digitization and digital preservation, and the OCLC Cooperative*

Contract Cataloging Program (ConCats)
612-624-4002, 800-462-5348, ConCats@umn.edu
Mark Ehlert

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Minitex is a publicly supported network of academic, public, state government, and special libraries working cooperatively to provide and improve library service to patrons in Minnesota, North Dakota, and South Dakota.

For address and name changes, please send a message to mino@umn.edu.

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# Minitex
DEDICATION. EXPLORATION. INNOVATION.

# DIGITIZATION, CATALOGING & METADATA MAILING

## A Publication of the Minitex Digitization, Cataloging & Metadata Education Unit

This calendar primarily lists events scheduled by Minitex, although other events are included. This is an informational posting only, registration materials are sent separately.  If you would like your event included in the calendar, please call Kay Kirscht at 612-624-3532.

## NOVEMBER

**29**

ELM In Depth Series: ProQuest (Week 5)
1:00 p.m. – 2:30 p.m., CST
*Online Reference Outreach & Instruction Training Session*
https://www.minitex.umn.edu/Training/Details.aspx?SessionID=431

**30**

CONTENTdm Basic Skills 3: Maintaining Collections in CONTENTdm
1:00 p.m. – 3:00 p.m., CST
*OCLC Online Training Session*
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=391

## DECEMBER

**4**

RDA for the Seasoned Copy Cataloger – Print Serials (Part 2 of 3)
*Online, 3-part, Self-Paced Training Series*
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=407

**5**

CatExpress: Copy Cataloging with CatExpress
1:00 p.m. – 2:30 p.m., CST
*OCLC Online Training Session*
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=244

**10**

RDA for the Seasoned Copy Cataloger – Print Serials (Part 3 of 3)
*Online, 3-part, Self-Paced Training Series*

http://www.minitex.umn.edu/Training/Details.aspx?SessionID=407

**12**

NISO Webinar: "Connecting the Dots: Constellations in the Linked Data Universe"
12:00 p.m. – 1:30 p.m., CST
*University of Minnesota - Twin Cities*
https://www.minitex.umn.edu/Events/Niso/#connecting

**12**

Connexion Client Module 02: Basic Bibliographic Searching
1:00 p.m. – 3:00 p.m., CST
*OCLC Online Training Session*
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=387

**12**

Britannica's Interactive Learning Materials
3:00 p.m. – 3:30 p.m., CST
*Online Reference Outreach & Instruction Training Session*
https://www.minitex.umn.edu/Training/Details.aspx?SessionID=369

**13**

RDA Cataloging – Basic Books
10:00 a.m. – 1:00 p.m. CST
*Online Training Session Series*
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=408

**24-25**

Winter Holiday
*Minitex Closed*

## JANUARY

**1**

New Year's Day
*Minitex Closed*

**11**

CatExpress: Copy Cataloging with CatExpress
1:00 p.m. – 2:30 p.m., CST
*OCLC Online Training Session*
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=244

**16**

Connexion Client Module 5:  Automation and Customization
1:00 PM - 3:00 PM, CST
*OCLC Online Training Session*
https://www.minitex.umn.edu/Training/Details.aspx?SessionID=443