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MINITEX/OCLC MAILING

December

Announcements

OCLC Annual Report Now Available

OCLC; edited

OCLC has published its 43rd annual report to the membership. In the report, Jay Jordan, OCLC President and Chief Executive Officer, wrote that fiscal 2010 was a momentous year. He states at the beginning of the report that:

Members of the OCLC cooperative adopted a new policy for use of WorldCat records and completed the transition to a new, global governance structure. Participation in OCLC services continued at strong levels. The WorldCat database grew at an extraordinary rate. At the same time, the cooperative launched new services that strengthen libraries and help reduce their costs.

Two local institutions are mentioned in the report (see page 15 of the PDF)

- Minitex made number one on the Top 10 List of Lenders, lending 63,394 items.
- SELCO made number 5 on the Top 10 Original Cataloging List with 22,682 original records added to WorldCat

Libraries used OCLC to:

- catalog 389.3 million items online and via batchload
- add 57.8 million records to the WorldCat database
- arrange 10.2 million interlibrary loans
- perform 65 million end-user reference searches on the OCLC FirstSearch service
- perform 150 million click-throughs from partner sites on the Web to the WorldCat.org landing page
- add approximately 1 million records to WorldCat

Print copies will be mailed to OCLC member libraries in this month. The report is also available online at:

http://www.oclc.org/us/en/news/publications/annualreports/2010/2010.pdf ▪

FirstSearch Database Changes

OCLC; edited

In March 2010, OCLC announced that it is transitioning from reselling eContent provided by publishers and other content providers as OCLC increase their focus and investment on enhancing WorldCat and delivering new WorldCat platform services and Web-scale library services.

As part of this transition, OCLC continues to remove databases from FirstSearch when all subscriptions to the content have ended.

Access ends Dec. 31, 2010, for the following:

- Arts & Humanities Search per search
- Business & Industry subscription and per search
- Business & Management Practices subscription and per search
- Contemporary Women's Issues per search

Access ends Jan. 31, 2011 for the following :

- AGRICOLA subscription
- Environmental Science & Pollution Management subscription
- MLA International Bibliography subscription
- Philosopher's Index subscription

Additional information about OCLC FirstSearch database transitions is available in the OCLC FirstSearch Database Transition list:

http://www.oclc.org/services/brochures/214431usf_OCLC_FirstSearch_Database_Transition_List.pdf ∎

More Ways To Update Your OCLC Authorizations

Sara Ring, Minitex/BATS

I want to point out two relatively new features in the OCLC Online Service Center (http://www.oclc.org/us/en/servicecenter/default.htm) that you might find useful.

Delete Authorizations

You can now delete OCLC Cataloging (including Local Holdings Maintenance) and WorldCat Resource Sharing authorizations through the OCLC Online Service Center. Currently, one can only *delete* an authorization through this interface. If you need to *change* or *add* a new authorization for any OCLC service, you can do so by submitting the online form:

https://www3.oclc.org/app/sysacc/header.pl

View and download a current list of your institution's OCLC authorizations

Previously, you could only receive a current list of your authorizations by contacting OCLC or Minitex. Now, you can view an up-to-date list of your authorizations at any time by following the steps below.

Log on to the Online Service Center here:

http://www.oclc.org/us/en/servicecenter/default.htm

Once you have logged on, look at the left side navigation. Under "Manage My Institution Account," click on "Authorizations." Scroll all the way to the bottom of the page and look for the link that says "Export Options: Excel." Click on the link and download, save, or share your current list of OCLC authorizations with others at your institution.

Don't have an account username and password? If you need access to the Online Service Center, look for the "Create an Account" link on this page:

http://www.oclc.org/us/en/servicecenter/default.htm ∎

RDA Q&A

Mark K. Ehlert, Minitex/BATS

Q. Assuming RDA is implemented by the Library of Congress—and by extension, the rest of the U.S. cataloging community—sometime later next year or 2012, how do we go about learning the new cataloging standard?

There is no one best way to learn RDA; everyone's approach will be different. As I mentioned in passing last April (*Minitex/OCLC Mailing* article originally published in April 2010; revised and updated last month and posted at http://www.minitex.umn.edu/Cataloging/RDANo2.pdf), some catalogers will feel comfortable reading RDA straightaway, others will reverse engineer their understanding of the new code by setting AACR2 and RDA side by side, and yet another group will

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acclimate themselves to the rules by taking them in slowly one piece at a time. Add to these approaches intra- and inter-institutional training opportunities as well as conversation with colleagues, and you see the possibilities becoming more varied.

By way of example, allow me to share my experience. Cognizant that the new cataloging manual is put together in a different manner than AACR2, I first made it a point to understand RDA's broad organization without paying much attention to the individual rules. (I had on hand at the time the Nov. 2008 draft found here: http://www.rdatoolkit. org/constituencyreview) To this end, I manually typed out RDA's table of contents. I initially didn't dig too deeply into the constituent parts of the work while devising my document, but as I continued composing the thing, I decided to record the RDA structure down to its lowest level. I discovered by doing so that there is a (usually) basic logic behind the structure of RDA that was not apparent to me at the beginning. All in all, it turned out to be a sometimes tedious undertaking, but one I ultimately found fruitful in this regard: when it comes to finding answers to my RDA cataloging questions, I know where in general, if not specifically, to look for the instructions that may resolve my issues.

For those interested in pursuing this line of attack, but who may not want to start from scratch, the RDA Prospectus offers a basic table of contents near the bottom of the page:

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

In fact, I recommend reading this whole document as another way of getting your bearings with RDA.

My next step involved reading the original FRBR and FRAD documents (http://www.minitex.umn.edu/Cataloging/ Rules.aspx#frbr). I performed this step chiefly as research for composing a *Minitex/OCLC Mailing* article (see the reference in the first paragraph above), but it certainly informed my knowledge of RDA also. I don't think this is a requirement for the typical cataloger; it is possible to understand FRBR/FRAD concepts through RDA rather than apart from it, albeit I think with some difficulty. When coming to RDA green, some background knowledge of FRBR/FRAD is helpful, the new terminology especially: *work*, *expression*, *manifestation*, etc. The makers of AACR2 have been slipping this vocabulary into the AACR2 text over the last few updates; now under RDA, it's in full bloom. So to recognize these and other FRBR/FRAD concepts, I encourage, at least, reading short articles and Wikipedia entries on the matter. See the Minitex *Cataloging Rules & Changes* webpage for suggested resources:

http://www.minitex.umn.edu/Cataloging/Rules.aspx#frbr

Once I had these generalities under my belt, I moved

ahead to the specifics of RDA: understanding the terminology further; reading through the instructions, sometimes comparing notes with AACR2; practice cataloging with a few books.

Q. So once we read or skim through all the chapters, we'll have a good handle on cataloging under RDA?

Pretty much, but it will take time. Like with AACR2, you can't absorb the whole text in one go. It also depends on the level of cataloging you pursue with RDA, whether copy cataloging, original descriptive cataloging, or authority work. Based on that selection, you might skip certain rules, some chapters, or whole sections.

This being a new cataloging manual, there will be some changes in the outcome of our work. You can find a nice summary explaining the differences between AACR2 and RDA cataloging in this PDF document:

http://www.rda-jsc.org/docs/5sec7rev.pdf

Adam L. Schiff, principal cataloger at the University of Washington Libraries, authored another excellent resource on this topic:

http://faculty.washington.edu/aschiff/ BCLAPresentationWithNotes-RevAug2010.pdf

Remember that other local, consortial, and national cataloging standards will come into play as well. Consider the Library of Congress Policy Statements (LCPSs) and the various BIBCO, NACO, SACO, and CONSER norms. This assortment of practices will be no different than what we have now under AACR2.

Q. Any tips you can pass along about applying RDA to everyday cataloging?

There are various points I can list here, but I will start with this observation: RDA instructions tell you how to fill in blank lines, so to speak, especially those directions that make up the first sixteen chapters of the text. When you transcribe the title proper from a music CD in hand, you record it under the TITLE PROPER element (RDA rule 2.3.2; in MARC, 245 $a). Or if you're filling in a blank line:

TITLE PROPER: Symphony no. 9 in D minor, "Choral"

We do this same thing when cataloging under AACR2 and MARC21, but, as seasoned catalogers, we typically bypass the blank line stage and plug information directly into the MARC record—we're familiar enough with AACR2 cataloging that translating it into MARC poses few problems. With RDA, we'll have to relearn some of that translation process, in part because of the different

structure and language of the cataloging text. The "fill in the blank line" approach may be a helpful first step in this review.

Of note, too, is that the central text of RDA—chapters 0 through 37—tells us little if anything on how to put together the various pieces of information to create a record. For instance, nowhere in Chapter 2 of RDA are there instructions that tell us to place the subtitle of a book recorded under the element Oᴛʜᴇʀ Tɪᴛʟᴇ Iɴꜰᴏʀᴍᴀᴛɪᴏɴ just after the title of book recorded under the element Tɪᴛʟᴇ Pʀᴏᴘᴇʀ, following both of these with the name of the author recorded under the element Sᴛᴀᴛᴇᴍᴇɴᴛ ᴏꜰ Rᴇꜱᴘᴏɴꜱɪʙɪʟɪᴛʏ Rᴇʟᴀᴛɪɴɢ ᴛᴏ Tɪᴛʟᴇ Pʀᴏᴘᴇʀ. RDA's primary focus is describing how to fill in the blanks. As far as this new cataloging code is concerned, you can use whatever standard you want to put these pieces of information together.

In our present AACR-based catalogs, we follow the International Standard Bibliographic Description (ISBD), which is integrated into the AACR2 text itself. See AACR2 rules 1.0B and 1.0C, then 1.1A1 and 1.2A1. These rules are examples of the ISBD speaking through the AACR2 instructions. Further guidance is provided by the MARC21 standard, where we place subject headings in the 6XX area, main entry (when not the title proper) in a 1XX field, added entries under 7XX. We will want to continue using these standards as we transition to RDA; at present, we have no other widely-employed substitutes for application in our traditional library catalogs.

RDA guidelines on the arrangement of bibliographic information, prescribed punctuation, and mark-up for computer digestion—which is to say, the ISBD and MARC21 bibliographic standards—are summarized in Appendix D ("Record Syntaxes for Descriptive Data"). Notice especially a table (RDA rule D.2) matching "blank line" element names to the appropriate MARC tag/subfield. I have minor quibbles with this listing; consider the table a guide rather than gospel.

Some directions on ascribing punctuation to name, title, name-title, and place name headings are available in RDA chapters 6, 9 through 11, and 16, but you will still have to consult an appendix to get the full picture: Appendix E ("Record Syntaxes for Access Point Control"). Here you will find details on prescribed punctuation for headings, which ironically stem from AACR2 practice, and on the MARC21 standard for authority records.

All of this is to say that it's important to read over the appendices in addition to the main body of RDA.

One other point I will pass along, this on terminology. I have seen some catalogers use *MARC* when referring to *AACR2*. It is good practice to distinguish between these two, especially when bringing RDA into the conversation. AACR2 tells us how to describe the thing we're cataloging, along with the kinds of name and title headings we need to help library patrons find it. MARC is the computer coding we use to aid the computer in digesting that description and the headings we construct. RDA is designed to succeed AACR2, not MARC. MARC is and will be around and is largely unchanged—a 245 $a is where the title proper goes, whether you're following AACR2 rules or RDA rules. Some fields, subfields, and codes have been added to the MARC21 standard to accommodate new RDA material (e.g., the 336-338 fields). For a summary, see this webpage:

http://www.loc.gov/marc/RDAinMARC29.html

Q. We see a few chapters of RDA are completely blank. What's up with this?

The Joint Steering Committee for Development of RDA (JSC), the body responsible for the text, issued RDA with empty divisions: most of Section 4 (chapters 12-15, half of 16), all of Section 7 (Chapter 23), and all of Section 10 (chapters 33-37). These chapters, which will describe in broad strokes the creation and application of subject headings, stand vacant because the third Functional Requirements report, *Functional Requirements for Subject Authority Data* (FRSAD), had only just been published when the JSC released RDA this past June. A later revision of RDA will introduce text to these now bare chapters based on the material in FRSAD—assuming implementation, of course.

Q. So RDA was released as an unfinished work?

Yes, this is one of several negative points some catalogers have ascribed to RDA. Another issue is the sometimes overwhelming number of cataloging examples offered; see Chapter 19, for instance. A smaller selection of these specimens would have been enough to get the point across, in my opinion.

On the other hand, RDA as it stands at present covers the same range of content as AACR2. The instructions that would form the missing portions go above and beyond what AACR2 offers us.

Q. For those of us who want to start slowly, what do you recommend?

In addition to the points I mentioned in the first answer above, I would begin by reading the "Introduction" (Chapter 0), then taking some time off to let it sink in, especially the terminology. Later, confine your exploration of RDA to Section 1 ("Recording Attributes of Manifestation and Item"). The chapters that make up this section guide the cataloger in recording the descriptive portion of the bibliographic record; in MARC terms, this

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covers the fixed field (008 and Leader), the 02X fields, and the 2XX fields to the last 5XX note. (Some exceptions apply.) Copy catalogers and original catalogers will get heavy use out of these chapters, much like they do with Chapter 1 and specific format chapters of AACR2.

Read through RDA's "General Guidelines on Recording Attributes of Manifestations and Items" (Chapter 1). This introductory salvo provides a good footing for the more specific instructions found in chapters 2 through 4. Take a breather here, then press forward with chapters 2 and 3 ("Identifying Manifestations and Items" and "Describing Carriers," respectively), both of which are quite long. You'll recognize the contents of these chapters: this is where you find details on filling out the core of the bibliographic record. By accident or design, the parts that make up Chapter 2 fall roughly in line with the ISBD/MARC21 tag order we're all familiar with. Chapter 3 is an odd duck in that much of the information presented here applies to the physical description area of the record (MARC's 300 field), a few notes, and the new MEDIA TYPE and CARRIER TYPE elements (337-338 fields). Chapter 4 ("Providing Acquisition and Access Information"), a fairly short piece, offers further instruction on recording prices, some URLs, limitations on access, and so forth. And during this exploration of Section 1 revisit the "Introduction" at least once.

Missing from Chapter 3 is any guidance on recording the presence of illustrations (300 $b). This is where a little knowledge of FRBR comes into play, for illustrative data is considered expression-level information, thus calling for a peek at Section 2 of RDA ("Recording Attributes of Work and Expression"), specifically instructions about halfway through Chapter 7 ("Describing Content"). Examining this, instructions on how to record data for authority records and construct headings (sections 2-4), and those guidelines on relationships we find in the latter half of RDA, I will put off until next time.

Q. And for those of us who want to move more quickly?

Open to page 1 and have at it. ◼

Cataloging & Metadata

More About Connexion Client 2.30
OCLC; edited

Though you may have read about Connexion client 2.30 in the Nov. *Minitex/OCLC Mailing*, there have been updates to the OCLC website regarding Connexion client 2.30.

Please see the information below regarding future enhancements to OCLC Connexion client.

All Connexion client users will be required to upgrade to version 2.30 within 6 months of its release.

OCLC will announce the end of life date for versions 2.10 and 2.20 when version 2.30 is released. OCLC expects to release Connexion client 2.30 in March/April 2011. Minitex plans to offer a Connexion client 2.3 webinar shortly after the release in spring 2011. Enhancements include:

Links to the RDA Toolkit
- Connexion users who subscribe to the RDA Toolkit are able to link from a displayed bibliographic or authority record to the RDA Toolkit.
- When the menu *Tools --> RDA Toolkit* is selected, the RDA Toolkit opens in a browser window and displays the RDA content associated with the specific MARC field.
- A subscription to the RDA Toolkit is required to use this feature. Subscribers can enter their authorization and password in a new tab called *RDA Toolkit* in *Tools --> Options*.
- The new RDA Toolkit menu can be assigned to a keymap or user tool.

Display of 029 fields
- 029 fields are relocated to the bottom of displayed bibliographic records.
- The 029 field remains at the top of the record when exported.

Language of Cataloging Limiter in Search WorldCat dialog
- Users can limit WorldCat searches by language of cataloging by selecting a language from a dropdown in the Search WorldCat dialog. The limiter can be checked or un-checked as needed. It is retained until changed.
- The language of cataloging limiter applies to the Command Line and Keyword/Numeric areas of the Search WorldCat dialog and the quick tool search on the toolbar.

Language of Cataloging display in local bibliographic save file search results
- A CatL column is added to the Column Settings list in the local bibliographic save file search results.
- Users must select the CatL column to display it. In a search results list, right click and select List Settings.

In the Column Settings window, select the CatL check box and use the Move Up and Move Down buttons to reorder the list.

- The language code displayed is based on data in the 040 $b of the record. If no 040 $b exists, the cell is blank.

Increase in the number of batch searches to download from 100 to 150

- In the *Tools --> Options --> Batch* tab, the Maximum Number of Matches to Download is now 150.

Option to allow export of workforms

- Users can explicitly turn on an option to export workforms before the records are added to WorldCat or the Authority File.

- A new checkbox called Allow export of workforms is added to the *Tools --> Options --> Export* tab. The setting defaults to unchecked. If checked, the *Action --> Export* command is enabled if the active record is a workform.

Changes related to recent MARC Updates

- Several language names are added to the Search WorldCat dialog dropdowns.

- Some language names that have changed are updated, and a few obsolete languages are removed from the Search WorldCat dropdowns.

- Additional indexes are in the appropriate search and/or browse drop down lists in the search dialogs for WorldCat and Authorities.

- New material types for Blu-ray Discs, U-matic, NTSC, and ATSC are added to search dropdowns.

- A new element for Fixed Field and 006 Form of item is in the Computer File workform.

- For additional information see the MARC Update Technical Bulletins 256, 257, and 258: http://www.oclc.org support/documentation/technicalbulletins ■

Resource Sharing Statistics

Sara Ring, Minitex/BATS

While attending a session about Interlibrary Loan and Purchase On-Demand at the MnPALS user group meeting back on Oct. 28, there was discussion about a new report in Aleph that generates frequently requested items via ILL.

Did you know that you can view a report for your OCLC borrowing that you could sort to show your most frequently borrowed items? If you use WorldCat Resource Sharing or iLLiad to borrow/lend outside the Minitex region, read on.

Log on to the OCLC Usage Statistics Portal (http://www. stats.oclc.org) with your OCLC ILL authorization and password. Within the Resource Sharing tab, click on the report called "Borrower Resource Sharing Stats Report."

This is the most detailed report available from this web portal. You can export the report, then sort by Title within Excel. If you use this report to see how often a title was requested for interlibrary loan, you could also use it to decide to purchase the item and add it to your permanent library collection. ■

WorldCat Resource Sharing Quarterly Enhancements

OCLC; edited

OCLC recently rolled out the following enhancements to WorldCat Resource Sharing:

Subfield h of the 245 MARC field has been added to the Resource Sharing work form

This subfield is the indicator of the format of an item. Indicating the format on the work form will make it easier for staff to quickly determine the format of the item in order to find out whether or not it is available for lending.

Select up to 10 additional lending libraries that will be added to the work form in the "Locations" field.

This allows the borrowing library to use these additional lenders if the request goes unfilled without having to search and display holdings again. **Note**: They will not automatically appear in the "Lenders" field when a request is unfilled. You will have to copy and paste them in place

Direct Request

Borrowing libraries using Direct Request can see their local holdings information in the "My Library's Holding" field of the work form allowing them to determine if the item requested by their user is available in their own library. ■

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Digitization & Preservation

Upper Midwest CONTENTdm User Group Meeting a Success

Sara Ring, Minitex/BATS

116 individuals from over 45 institutions participated in the 3rd Annual Upper Midwest CONTENTdm User Group Meeting, Nov. 8th-9th. For the first time the meeting was held online, sponsored by Minitex and OCLC. On the first day participants learned about using finding aids in CONTENTdm, tweaking CONTENTdm statistics to get more accurate results, and heard from Phyllis Kaiden, CONTENTdm product manager, about what's coming in the next version of CONTENTdm. Day 2 topics covered: using OCLC preservation tools and CONTENTdm to preserve and provide access to electronic state documents, crosswalking MARC records containing diacritics to Dublin Core, and using the CONTENTdm quick start package. Presentations and handouts are available on the Minitex website:

http://www.minitex.umn.edu/Events/Conferences/
Highlights/2010/ContentDm

Here are a few comments from the evaluations:

- "The online format was great, and for me essential. I hope you do offer it for all your user group meetings."
- "A great format, and very cost effective."
- "This was fantastic. It is hard to get money to travel these days and to take the time but it was pretty easy to get the ok to attend a conference like this online."
- "I loved the virtual format. I never would have gotten permission or funding to go in person."

Thanks to everyone who attended and gave us feeback in the survey after the meeting! The 2011 planning group will use your suggestions to plan the next Upper Midwest CONTENTdm User Group meeting.

Visit any of the resources listed below to receive future announcements related to the user group:

Twitter
http://twitter.com/umcdmplanners

Facebook
http://www.facebook.com/UpperMidwestCONTENTdm

Upper Midwest CONTENTdm listserv
http://lists.wils.wisc.edu/mailman/listinfo/upmwcdm ■

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OCLC Local Holding Maintenance (formerly Union Listing).

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An Information and Resource Sharing Program of the Minnesota Office of Higher Education and the University of Minnesota Libraries

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DECEMBER 2010

OCLC Annual Report Now Available!

MINITEX/OCLC MAILING

A Publication of the Minitex Bibliographic and Technical Services Unit

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MINITEX CALENDAR

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.

DECEMBER

7

Points of View Reference Center
9:00 a.m. – 9:45 a.m., CST
Online Reference training session
https://www.minitex.umn.edu/Training/Details.aspx?SessionID=257

8

MarcEdit: An Introduction
Workshop
Hubert H. Humphrey Institute of Public Affairs, 50B (West Bank Campus), Minneapolis, MN
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=309

9

WorldCat Collection Analysis
2:00 p.m. – 3:00 p.m., CST
Online training session
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=76

14

Connexion Browser Module 2: Basic Searching in Connexion Browser
1:00 p.m. – 2:00 p.m., CST
Online training session
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=240

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RDA: What It Is, and What It Means to You
10:00 a.m. – 12:00 Noon, CST
Online training session
http://www.minitex.umn.edu/Training/Details.aspx?SessionID=302

24 - Jan. 2

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