

**Report of the OCLC Search and Discovery Task Force to the Board of Directors of the Music Library Association and the Executive Board of the Music OCLC Users Group**

**May 20, 2016**

**Revised July 5, 2016**

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OCLC launched WorldCat Discovery Services in 2014 to serve as a library discovery layer that provides access to the WorldCat database. As of the MLA annual meeting in 2015, OCLC planned to discontinue the FirstSearch Service on December 31, 2015, and transition FirstSearch customers to WorldCat Discovery. Over the summer of 2015, OCLC announced that it will require per-search customers to transition to WorldCat Discovery on December 31, 2015, and will delay the transition for unlimited customers until late 2016. On March 15, 2016, OCLC announced that it will redesign the FirstSearch interface and offer it as a separate service from WorldCat Discovery. OCLC also announced that the current version of FirstSearch will be available until some time in 2017. Libraries that choose to use WorldCat Discovery Services as a discovery layer can provide single search access to their local holdings, WorldCat, and subscription databases. Libraries can also elect to use WorldCat Discovery Services to access WorldCat only. More information can be found at <https://www.oclc.org/worldcat-discovery.en.html>.

After the 2015 Music Library Association meeting in Denver, when a number of MLA members expressed concern about the discontinuance of the FirstSearch service, MLA President Michael Rogan and MOUG Chair Bruce Evans established the Joint MLA-MOUG OCLC Search and Discovery Task Force with the following charge:

Working with the Music OCLC Users Group, investigate OCLC's WorldCat Discovery Services to determine if it will be sufficient to meet the needs of music users. If the Task Force determines that WorldCat Discovery Services is not sufficient, it will recommend a course of action to petition OCLC to continue to provide the FirstSearch interface for WorldCat after December 31, 2015. It will also recommend a course of action to petition OCLC for specific improvements to WorldCat Discovery Services to meet the needs of music users.

Over the summer of 2015, the task force assessed two publicly available instances of WorldCat Discovery Services. These are located at the Virginia Polytechnic Institute and State University, and at the Melvyl search interface of the University of California Libraries.<sup>1</sup> To guide our assessment, we used the checklist that Rebecca Belford assembled as an appendix on pp. 61-65 of her article, "Evaluating Library Discovery Tools through a Music Lens," *Library Resources & Technical Services* 58, no. 1 (January 2014): 49-72, <https://journals.ala.org/lrts/article/view/5035/6095>.

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<sup>1</sup> Virginia Tech, <https://virginiatech.on.worldcat.org/discovery>; Melvyl, <https://melvyl.on.worldcat.org/discovery>.

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Belford's checklist provides guidelines for the assessment of discovery tools' facility in handling searches for music materials, with particular focus on:

- Headings, including names, titles, subjects, form/genre, relationships, and medium of performance
- Languages
- Notes
- Edition and musical presentation
- Publisher numbers
- Diacritics, special characters (including musical symbols), and stopwords

In August of 2015, the task force divided Belford's checklist of questions and assessed the two instances of WorldCat Discovery at Virginia Tech and at the University of California (Melvyl) by answering the assigned questions. The answers were verified in January of 2016. The narrative report below presents our findings in summary, arranged by major headings within Belford's checklist. Our findings are mainly concerned with how WorldCat Discovery Services provides access to music materials in the WorldCat database, but have included observations about other features of WorldCat Discovery Services when relevant.

### **General Questions**

In this section, Belford posed the following questions:

- Which MARC fields and subfields display?
- How are displayed fields and subfields labeled?
- Are field tags, indicators, or subfields used to generate specific labels?
- Which fields display (1xx through 8xx)? In what order? How are they grouped?
- Is any coded information (LDR/0xx) indexed or displayed in a readable form for the end user?
- How does subfield order within a field compare to the original MARC record?
- Which indexes are available for searching? Which fields/subfields are included in each index?
- Which indexed information is visible in a record?
- Are search terms visible in brief results or single records?
- What information is used to determine facets or limits? How does this compare to search indexes?

OCLC has published the MARC fields that display, in order, along with their display labels in WorldCat Discovery in an online document entitled "Item bibliographic data as displayed in the WorldCat Discovery interface," available at <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html> (accessed February 15, 2016). This document also lists the tags, indicators, and subfields used to generate specific labels in the display. The OCLC document groups the fields into two parts of the display, "Brief Item Detail," and "Description." OCLC specifies the coded information from bibliographic records that is indexed and displayed in "Format/Document Type Values and Codes" and "Material Type Names and Codes" in the document "Searching WorldCat Indexes," available at <http://www.oclc.org/support/help/SearchingWorldCatIndexes/>. OCLC generally displays subfield data within any MARC field in the same order as the MARC record, with the exception of the 245 field, in

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which the subfield \$c does not display. “Searching WorldCat Indexes” also indicates the indexes available for searching in WorldCat Discovery. Libraries have the option to customize the default search indexes in the public interface, and users may change this. The advanced drop down menu varies according to the databases selected. For example, the Melvyl instance at the University of California dropdown menu includes index options applicable to all databases in the default search, not just WorldCat.

“Item bibliographic data as displayed in the WorldCat Discovery interface” shows which indexed fields display. The task force found that once a search has been executed, search terms are visible in the search box at the top of the screen in the brief results display, but they are not highlighted or bolded in the brief results. After a search has been executed, the search facets include a sort option as well as facets for content, format, databases, years, language, and topic. These are not the same as the search indexes, and they appear to work in a complementary fashion.

### **Headings (controlled subjects and genre/form terms, names, titles)**

In this section, Belford posed the following questions:

- Where in the record do headings display? How are they grouped?
- Are headings clickable links?
- Which subfields within a heading are linked?
- Are subfields bound together as a single link?
- Do linked headings generate a keyword search for each term or subfield separately (Boolean AND) without regard to order?
- In which indexes do linked headings generate a search?
- Is there an option to link to a user-selected portion of a heading to execute broader or narrower searches (decreasing precision by clicking on subfields from right to left in an access point)?
- Is browse searching available?
  - How should terms be entered?
  - Do terms need to be entered in a specific order?
  - How does a browse search function when terms other than authorized forms of names, titles, or subject/genre headings are entered? Does it make a difference if the terms are entered as *see* references in authority records?
  - Do clickable links on headings generate browse searches?
- What use does the tool make of authority records?

The task force found that personal and corporate name headings display together at the top of the full view. The first name heading and some of the second name heading display in the brief view. Subject headings appear together under the description in the full view, though one must actually click on “Description” to see subject headings. The vocabulary of the subject headings is not indicated. Uniform titles from the 240 field display and are labeled as “Uniform Title,” but name/title headings from 7xx fields do not appear. Headings for series titles do appear and are linked. We found that headings are displayed as clickable links that will result in keyword searches (but not phrase searches) for each term in any order in the appropriate fields. Subfields within headings appear to be searched as keywords when clicked. In author headings, only subfield \$a is a clickable link. Linked headings generate searches

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in the name, subject, series, and uniform title indexes.<sup>2</sup> Users do not have the option to click on only part of a heading to broaden or narrow their search; if they click on one part of a heading, all words in the heading will be used for the resulting keyword search. Browse searching is not available in WorldCat Discovery, and authority records are apparently not used.

### **Names**

In this section, Belford posed the following questions:

- How and where does the statement of responsibility (245 \$c) display in relationship to the title in the 245 field and names in 1xx/7xx fields?
- Which fields containing names display in brief results (information from 1xx, 7xx, 245 \$c, 508, 511, other)? Is this dependent on format? For example, 1xx for books but 511 for sound recordings.
- Do elements within \$a in name access points display in the desired order?
- Are name access points displayed fully enough for identification and differentiation?
- Which name access points or portions of name access points appear under an author facet?
  - Corporate or conference names as main entry (110, 111)?
  - Names in added entries (700, 710, 711)?
  - Names in series (800, 810, 811)?
  - Names in added entries that contain title (\$t) subfields?
- In single records, are there label or display distinctions between main and added author access points (1xx versus 7xx, 8xx)? Between personal, corporate, conference, or series names?
- Do names in subject fields (600, 610, 611) appear under a subject facet?

The task force found that statements of responsibility as found in the 245 field, subfield \$c do not display in WorldCat Discovery. Names in 1xx and 7xx fields appear to display in brief results, as long as there is available space.<sup>3</sup> These names display with the first name first, followed by the last name. Punctuation in subfield \$a of the 100 or 700 field governs whether or not a period appears after the first name in the WorldCat Discovery display. Name access points are not displayed fully enough to allow for satisfactory identification and differentiation. A classic example is the composer John Adams, compared with the second president of the United States. Author facets include personal, corporate and conference names in 1xx fields. It is not clear whether names in the 800 field are also listed in author facets. WorldCat Discovery does not appear to distinguish between main and added author access points (1xx versus 7xx or 8xx). Names in subject fields (600, 610, and 611) do not appear in subject facets.

### **Titles of works and expressions**

In this section, Belford posed the following questions:

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<sup>2</sup> See the name, series, subject and uniform title indexes in "Searching WorldCat Indexes," OCLC, accessed May 17, 2016, <http://www.oclc.org/support/help/SearchingWorldCatIndexes/>.

<sup>3</sup> "Item bibliographic data as displayed in the WorldCat Discovery interface," OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

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- Are preferred titles (130, 240, 7xx \$t with additions, 730) identified or indexed separately from other title access points (245, 246, 740)?
- Is there a separate, additional index for preferred title?
- Are all subfields within a preferred title field linked as a single (bound) search string?
- If access points for preferred titles include names:
  - Do titles in field 240 display with or near the associated name in a 1xx name access point entry?
  - Is a link in field 240 bound to the name in a 1xx name access point (name-title search)?
  - Are links on titles in name-title added entries bound to their associated names?
  - How is a title in a name-title access point displayed in relationship to its associated name? In other words, is it clear who wrote what work?
- If a record contains both name and name-title added entries, how are headings of each type grouped? Does the presence of title subfield (\$t) prompt headings in 7xx name fields to be labeled differently than name headings without titles? For example, “Contributor” versus some sort of label suggesting a work or title.
- Do searches or browses for a numbered work within a number range in a title subfield \$n retrieve records where only the first and last numbers in the range are recorded?

The task force found that titles recorded in 130, 240, and 730 fields are labeled as “uniform title.”<sup>4</sup> There is an index for preferred title, but it is not available as an option in the advanced search. Users must execute a command search for “ut.”<sup>5</sup> Subfields within the “uniform title” display of fields 130, 240, or 730 are hyperlinked as keyword searches within the uniform title index. Titles in the 240 field do not display with their associated names, resulting in no meaningful name-title headings in the record displays. Neither does WorldCat Discovery offer a name-title heading search. It is not clear whether numbered works within a number range in a title subfield \$n retrieve records where only the first and last numbers in the range are recorded.

## Analytic Entries

In this section, Belford posed the following questions:

- Do analytic title entries (7xx with 2<sup>nd</sup> indicator “2”) display?
- Are controlled analytic entries (titles in MARC fields 700, 710, 711, 730) differentiated in display, linking, or indexing from uncontrolled analytic entries?
- Are indicators in MARC 7xx name or titles fields to generate a display? For example, “Contains” or “Related title.”

Analytic titles associated with names (those in fields 700, 710, 711) do not display in WorldCat Discovery. Analytic titles in 730 display, with no special differentiation.

## Relationships

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<sup>4</sup> “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

<sup>5</sup> “Uniform Title,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

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In this section, Belford posed the following questions:

- Are relator codes (\$4) or relationship designators (\$e) displayed?
- Are codes displayed in a spelled-out form (“performer” versus “prf”)?
- Is information in relator codes or terms used for additional indexes or facets (performer, conductor, composer, editor, etc.)?
- Does information in 7xx \$i display? Does all information in \$i display? (“Based on (work)” versus “Based on,” etc.)?
- Does the presence of \$i in a 7xx field suppress a general 7xx field label?
- How is data in 7xx \$i handled in browse, keyword, name, or title index?
- Is there any linking functionality based on the *RDA* relationships indicated in a subfield \$i (navigation to all parodies, or all works based on a particular play)?

Relator codes and relationship designators do not display or generate displays in WorldCat Discovery. Additionally, there are no facets or indexes based on relationship designators that are useful to music materials, though some relationship designators are used for a provenance index for archival records.<sup>6</sup>

## Subjects

In this section, Belford posed the following questions:

- Do title headings in subject fields (630, 600 \$t and subfields) appear under a subject facet? With associated names?
- Are non-topical subject subdivisions (\$v \$y \$z) distributed over facets other than subject?

Title headings in subject fields do not display in subject facets in WorldCat Discovery. The only subject facets that display are “topics,” “based on the top levels of *Conspectus*.”<sup>7</sup>

## Genre/Form

In this section, Belford posed the following questions:

- Is there a genre facet?
- Is there a genre index? Which fields or subfields are included?
- Are genres indexed as subjects?
- Is there an option to search a combined subject/genre index?
- Are form subdivisions (\$v) in subject headings indexed as genres or included under a genre facet?
- How is related coded information for music genre/form (008/18-19, 047) used?

WorldCat Discovery does not have a genre/form facet, but it does have a genre/form index, including the 655 field, which is also indexed as a subject and included in subject searches.<sup>8</sup> Codes in the 008/18-

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<sup>6</sup> See “Provenance,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Provenance.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_71](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Provenance.htm%3FTocPath%3DIndexes%7C_____71).

<sup>7</sup> “WorldCat Discovery adds course reserves, topic facet, database groupings and more,” OCLC, May 11, 2015, accessed May 17, 2016, <https://www.oclc.org/news/announcements/2015/worldcat-discovery-may-enhancements.en.html>.

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19 and the 047 \$a fields are used to populate a “musical composition” search, available as a command search only.<sup>9</sup>

### **Medium of performance (music only)**

In this section, Belford posed the following questions:

- Are medium of performance fields (382; \$m within title fields 130, 240, 6xx, 7xx) indexed and displayed?
- Is there a separate, additional index for medium?
- Is a customized search interface for medium available?
- How is coded medium information (048) used?

WorldCat Discovery partially displays the 382 field, labeled “Medium of Performance,” and generates a display from the 048 field, labeled “Number of musical instruments or voices.” There are no separate indexes or search options.<sup>10</sup>

### **Format limits, facets, icons, and labels**

In this section, Belford posed the following questions:

- What icons, labels, and terms are used?
- What formats are offered in limits/facets? Can multiple formats be selected to expand search results?
- Is there sufficient specificity?
- Are labels logical, precise, and accurate? Do labels reflect content, carrier, media, or a combination?
- Can format(s) be easily identified in brief results and in individual records? How?
- Are multiple formats coded in a single record each indexed and displayed?
- How is the general material designation (245 \$h) used if present?
- How is data in 33x or 34x fields utilized to indicate format or provide facets/limits?

WorldCat Discovery appears to use many icons. There are icons for print books, microforms, musical scores, ebooks, evideos, music LP, music CD, DVD video, thesis/dissertation, large print book, Braille book, continually updated resource, emusic, music cassette, chapter, article, downloadable article, object and more. There are a wide variety of format facets. Note that the facet options under the format facet contain are presented in a two-level hierarchy. The facet options especially relevant to music are sound recording, musical score, downloadable musical score, music CD, music LP, emusic,

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<sup>8</sup> See “Genre/Form,”

[http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Genre\\_Form.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_31](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Genre_Form.htm%3FTocPath%3DIndexes%7C_____31); and “Subject,”

[http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Subject.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_79](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Subject.htm%3FTocPath%3DIndexes%7C_____79), in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016.

<sup>9</sup> “Musical Composition,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016,

[http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Musical\\_Composition.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_56](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Musical_Composition.htm%3FTocPath%3DIndexes%7C_____56).

<sup>10</sup> “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

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music cassette.<sup>11</sup> Multiple formats can be selected to expand search results. The format facets appear to be sufficiently specific, for the most part. Note that according to WorldCat Discovery's terminology, "music" means recorded music, while "musical score" means printed music. Labels appear to be logical, precise, and accurate, reflecting content, carrier, and media. Labels and icons identify formats in brief results and individual records. Multiple formats coded in a single record appear to be indexed, but it appears only the first of the formats is displayed.<sup>12</sup> The general material designation (245, subfield \$h) does not appear to be used. Data from the 33x and 34x fields does not appear to be utilized to provide facets or limits.

### Language limits, facets, or labels

In this section, Belford posed the following questions:

- Does the code for "no linguistic content" (zxx) generate a limit, facet option, or label? What term is used?
- How is coded language information (008/35-37, 041 \$a, \$d) indexed, displayed, or used for limits/facets?
- Are codes for subtitles (041 \$j) treated as a primary language for indexing and limits/facets?
- How is coded information about translations (041 1<sup>st</sup> indicator, 041 \$h, \$k, \$m, \$n) used?
- Is coded information for accompanying material (041 \$b, \$e, \$f, \$g) or subtitles (041 \$j) indexed, displayed, or used for limits/facets? Are there more detailed facets based on the subfield definitions in 041?
- How is field 377 (associated language) indexed or displayed?

In WorldCat Discovery, the code for "no linguistic content" generates a line in the description section of the bibliographic record reading "Language: No Linguistic Content." Coded language information in the bibliographic record generates a line in the description section indicating the language. Codes for subtitles (041, subfield \$j) do not generate a language display.<sup>13</sup> Subtitles data can be retrieved searching by keyword. Coded translation information is not used, but the word "translation" may be searched as a keyword. Language information for accompanying material and subtitles are not used to generate labels or facets. The 377 field is used in the Entity Attributes and Language indexes, but not displayed.<sup>14</sup>

### All notes (5xx)

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<sup>11</sup> The complete list of format facets can be found under "Searching WorldCat Indexes: Format/Document values and codes," accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/Default.htm#06\\_Format\\_Document\\_Type\\_Codes/Format\\_Document\\_type\\_codes.htm](http://www.oclc.org/support/help/SearchingWorldCatIndexes/Default.htm#06_Format_Document_Type_Codes/Format_Document_type_codes.htm).

<sup>12</sup> Ibid.

<sup>13</sup> "Item bibliographic data as displayed in the WorldCat Discovery interface," OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

<sup>14</sup> "Entity Attributes," [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Entity\\_Attributes.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_29](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Entity_Attributes.htm%3FTocPath%3DIndexes%7C_____29); and "Language," [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Language.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_41](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Language.htm%3FTocPath%3DIndexes%7C_____41), in "Searching WorldCat Indexes," OCLC, accessed May 17, 2016.

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In this section, Belford posed the following questions:

- Which notes fields display? Where do they appear in single records?
- Do repeatable fields display?
- In what order do notes appear (MARC record order, MARC numeric tag order, custom order)?
- Are notes distributed among multiple tabs or areas of a bibliographic record?
- How are notes indexed? Are notes or subfields included in multiple indexes?

In WorldCat Discovery, the following notes fields and subfields display (only subfield \$a displays unless otherwise indicated): 505 (subfields \$a, \$t, \$r, \$g), 520 (subfields \$a, \$b, \$c), 508, 511, 518 (subfields \$a, \$d, \$o, \$p, \$3), 507 (subfields \$a, \$b), 500, 501, 502 (subfields \$a, \$b, \$c, \$d, \$g, \$o), 504, 540 (subfields \$3, \$a, \$b, \$c, \$d, \$u), 561 (subfields \$a, \$3, \$5 – unless 1<sup>st</sup> indicator is 0). Repeatable fields display in the order listed above. Notes are distributed among multiple areas of bibliographic records, and notes and subfields are included in multiple indexes.<sup>15</sup>

### **Language/Notation note (546)**

In this section, Belford posed the following questions:

- How is subfield \$b indexed or labeled?
- How is related coded information 9008/35-37, 041) used?

In WorldCat Discovery, the 546 field is indexed under notes and keyword but does not display.<sup>16</sup> Data in the 008 35-37 generates a display labeled “Language,” with the corresponding language written out. The 041 field does not display. Both of these are indexed in the language index.<sup>17</sup>

### **Performer/Cast information note (511)**

In this section, Belford posed the following questions:

- Does information appear instead of or with statement of responsibility (245 \$c) in brief results or single records?
- Is information in this note also indexed in an author index?

In WorldCat Discovery, the 511 field appears in a separate field (“Performers” or “Cast,” depending on the indicator).<sup>18</sup> The information in the 511 field is also indexed in the name (or author) index.<sup>19</sup>

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<sup>15</sup> See “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>; and “Searching WorldCat Indexes,” OCLC, <http://www.oclc.org/support/help/SearchingWorldCatIndexes/>, accessed May 17, 2016.

<sup>16</sup> “5xx fields,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#05\\_FieldsAndSubfields/5xx\\_fields.htm?Highlight=546](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#05_FieldsAndSubfields/5xx_fields.htm?Highlight=546).

<sup>17</sup> “Language” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Language.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_41](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Language.htm%3FTocPath%3DIndexes%7C_____41).

<sup>18</sup> “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

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In this section, Belford posed the following questions:

- How are subfields \$d, \$p, and \$o indexed, displayed, or labeled? Does information in \$3 display?
- How is related coded information (033) used?

In WorldCat Discovery, Subfields \$a, \$d, \$o, \$p, and \$3 are displayed with the label “Event Notes.”<sup>20</sup> The coded information in the 033 field is neither displayed nor indexed.

## **Formatted contents note (505)**

In this section, Belford posed the following questions:

- Is the entire field for non-enhanced notes (\$a) included in author or title indexes?
- Are different subfields in enhanced contents notes indexed in appropriate indexes in addition to keyword: author index (\$r) and title index (\$t)? Is information in \$g indexed?
- Is punctuation within contents notes used to generate line breaks or layout?

In WorldCat Discovery, the non-enhanced notes in 505 (subfield \$a) are not included in author or title indexes. The author (subfield \$r) and title (subfield \$t) subfields in the enhanced 505 field are indexed in the name and title indexes, respectively.<sup>21</sup> Punctuation in the contents notes is not used to generate line breaks or layout.

## **Edition information (254) (music only)**

In this section, Belford posed the following question:

- Is any distinction in indexing or display made between fields 250 (edition) and 254 (musical presentation)?

In WorldCat Discovery, information in the 250 generates a public display labeled “Edition,” while the 254 generates a field labeled “Musical Presentation Statement.”<sup>22</sup> Under normal circumstances, neither field is indexed, except “Blu-ray” (and variant spellings) and “DVD” are used for the Material Type index when they appear in the 250 subfield \$a.<sup>23</sup>

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<sup>19</sup> “5xx fields,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#05\\_FieldsAndSubfields/5xx\\_fields.htm?Highlight=546](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#05_FieldsAndSubfields/5xx_fields.htm?Highlight=546).

<sup>20</sup> “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

<sup>21</sup> See “Name,” [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Name.htm?Highlight=505](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Name.htm?Highlight=505); and “Title,” [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Title.htm?Highlight=505](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Title.htm?Highlight=505) in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016.

<sup>22</sup> “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

<sup>23</sup> “Visual Materials,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#07\\_Material\\_Type\\_Names\\_Codes/Visual\\_Materials.htm?Highlight=blu-ray](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#07_Material_Type_Names_Codes/Visual_Materials.htm?Highlight=blu-ray).

## **OCLC Search and Discovery Task Force Report Publisher, music, or plate numbers (028) (music emphasis)**

In this section, Belford posed the following questions:

- Is there a separate, additional index for music number (028 \$a)?
- Is the publisher information in 028 \$b included in a publisher index?
- Do searches or browses for a publisher number within a consecutive range retrieve records where only the first and last numbers in the range are recorded in 028 \$a?

In WorldCat Discovery, there is a separate, additional index for music number (028, subfield \$a), labeled “Music/Publisher Number.” Publisher information in 028, subfield \$b is not included in a publisher index.<sup>24</sup> There is no browse available for publisher number, therefore WorldCat Discovery will not reliably retrieve publisher numbers within a consecutive range where only the first and last numbers in the range are recorded in 028, subfield \$a. On a related note, WorldCat Discovery only displays the 264 field (Production, Publication, Distribution, Manufacture, and Copyright Notice) if the second indicator is 1.<sup>25</sup> This is problematic for records entered according to RDA: for unpublished materials, no information would be displayed; the copyright date would be hidden from users in all cases.

## **Diacritics, special characters, and stop words (music emphasis)**

In this section, Belford posed the following questions:

- Do diacritics, sharps, flats, special characters, and the phonogram/copyright symbols display properly?
- Do the words “sharp” or “flat” generate searches for the respective symbols?
- Is there a way to enter sharp and flat signs from the search interface?
- Does the pound sign (#) function as a sharp sign?
- Does the pound sign (#) function as a wildcard operator?
- Do symbols pasted into a search function as those symbols?
- Does retrieval of records with diacritics require searches to be entered with diacritics?
- Is phrase searching possible?
- Can potential stopwords such as “a” or potential Boolean operators such as “no” be forced to function as search terms if enclosed in quotation marks?

In WorldCat Discovery, diacritics, sharps, flats, special characters, and the phonogram/copyright symbols display. The words “sharp” and “flat” do not generate searches for the respective symbols, and there is not a way to enter sharp and flat signs from the search interface. The pound sign does not function as a sharp sign, but it does function as a wildcard operator. Sharp and flat symbols pasted into the search do not retrieve sharps or flats in the results. Searches do not have to include diacritics in order to retrieve results spelled with diacritics. Users can search for phrase, and potential stopwords such as “a” and

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<sup>24</sup> “Music/Publisher Number” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016, [http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04\\_Indexes/Music\\_Publisher\\_Number.htm%3FTocPath%3DIndexes%7C\\_\\_\\_\\_\\_55](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#04_Indexes/Music_Publisher_Number.htm%3FTocPath%3DIndexes%7C_____55).

<sup>25</sup> “Item bibliographic data as displayed in the WorldCat Discovery interface,” OCLC, accessed May 17, 2016, <https://www.oclc.org/support/services/discovery/documentation/item-bib.en.html>.

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proximity operators can be forced to function as search terms if they are enclosed within quotation marks. Boolean operators must be in all capitals in order to function as operators.

### Nested Searching

Apparently Advanced Search does not support nested searching as does an index labeled command line search. This is not clear from WCD documentation. Capacity for nested searching in Advanced search is advantageous for end-users.<sup>26</sup>

### Recommendations

Our recommendations for improvement of WorldCat Discovery are based on our application of Belford's checklist in "Evaluating Library Discovery Tools through a Music Lens," and therefore address WorldCat Discovery from the point of view of music users. Additional changes to WorldCat Discovery beyond the scope of our recommendations may also lead to an improved product. The recommendations are grouped into the categories of major/critical recommendations, which would correct significant problems in searching for music materials, general recommendations, which would add clarity for users, and enhancements, which would add new functions for music users. These recommendations are specific to WorldCat Discovery Services. Comprehensive general recommendations for music discovery, with detailed MARC information and FRBR-based explanations, are available through the Music Library

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<sup>26</sup> A colleague of Michael Duffy's expressed concern to him about WorldCat Discovery's handling of nested searches. (The Task Force thanks Maria Perez-Stable of the Western Michigan University Libraries. The task modified her original search by substituting "brass band" for "industrial revolution," and girl\* for child\*). On February 23, 2016, we performed the following search in Western Michigan University's instance of WorldCat Discovery. (<https://wmu.on.worldcat.org/advancedsearch>). In separate search boxes (each line is a separate box) from the Advanced Search screen, with WorldCat as the only selected database:

**Subject: england OR "great britain" OR "united kingdom"**

**AND Keyword: "brass band"**

**AND Keyword: girl\* OR wom\***

This search retrieved 6,497,769 results when expanded to "Libraries Worldwide" from "Western Michigan University Dwight B. Waldo Library."

We then modified the search to use index labels and parenthetical nesting within the same search box:

su: (england OR "great britain" OR "united kingdom") AND kw: "brass band" AND kw: (girl\* OR wom\*)

The resulting search retrieved 12 results from "Libraries Worldwide."

In this illustration, the second search example retrieved far fewer results than the first example, and it appears to have found results containing all three parenthetically nested elements linked by the AND operators. The first example did not treat the AND operators in this way, retrieving far too many results. OCLC's documentation suggests that this would be the case and advises users that "Boolean searches can be nested using parentheses." See OCLC, "Searching WorldCat Indexes,"

[http://www.oclc.org/support/help/SearchingWorldCatIndexes/#03\\_Getting\\_Started/Combine\\_Qualify\\_Searches/Boolean\\_operators.htm?Highlight=nested](http://www.oclc.org/support/help/SearchingWorldCatIndexes/#03_Getting_Started/Combine_Qualify_Searches/Boolean_operators.htm?Highlight=nested), accessed May 17, 2016.

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Association's "Music Discovery Requirements" resources, available from <http://committees.musiclibraryassoc.org/ETSC/MDR>.

We recommend that the Board of Directors of the Music Library Association and the Executive Board of the Music OCLC Users Group consider making the following recommendations to OCLC jointly in order to advocate for music users with a unified voice. Further, we recommend that the Boards ask for ongoing communication with OCLC regarding these recommendations for improvements to WorldCat Discovery. WorldCat Discovery, as it currently stands, offers a far less satisfactory search interface than FirstSearch for music users. Acknowledging that OCLC now plans to continue to offer access to FirstSearch, we urge the Boards to ask OCLC to continue providing simultaneous access to the FirstSearch interface alongside WorldCat Discovery until OCLC provides the functionality currently present in FirstSearch that would make WorldCat Discovery usable for music. Further, we urge the Boards to ask for all the following recommendations to be implemented in WorldCat Discovery, and where applicable, in the new FirstSearch.

### **Major/Critical Recommendations**

#### ***Functionality present in FirstSearch that would make WorldCat Discovery usable for music***

- Display subfields \$b, \$c, \$d, \$k and \$q in name headings, to allow for identification and differentiation of names.
- When fields 700, 710, or 711 contain subfield \$t, display all title-related subfields (currently \$t, \$k, \$l, \$m, \$n, \$o, \$p, \$r, \$s), together with the name (all name-related subfields).
- Display 245 subfields together; alternatively, identify 245 subfield \$c as responsibility instead of names from 1xx/7xx (feature present in FirstSearch).
- Display all instances of the 028 field when present.

#### ***Functionality not present in FirstSearch that would make WorldCat Discovery usable for music***

- For linked searches generated from displayed controlled names, search on all name subfields within the field as a single phrase to link to the correct entity.
- When 7xx fields with subfield \$t are present, display those fields as hyperlinks to searches on the name-title heading.
- When a 240 field is present, display 240 combined with a repeated display of the 1xx, and hyperlink the resulting string to search on the name-title heading.
- Change the facet option for "music" to "music recording."

### **General Recommendations**

The Task Force considers the first six recommendations (in italics) to be of higher priority than the rest of the general recommendations below.

- *When 7xx fields with subfield \$t have second indicator blank, display with the label, "Related Works:".*
- *When 7xx fields with subfield \$t have second indicator 2, display with the label, "Contains:".*
- *Display all instances of the 546 field.*

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- *Display all instances of the 264 field and use second indicator to generate the appropriate label.*
- *Utilize additional coded Material Types to generate additional icons and to return search when facet option is selected.*
- *Treat search strings entered in separate lines of the Advanced Search as if there are parentheses around the set of all terms entered within a single search box.*
- Replace “musical” with “music” in all facet options that use the term “musical.”
- Add a facet for “print music score” to differentiate from “downloadable music score.”
- Use ISBD punctuation in 505 fields to generate display. Specifically, use the long dashes between titles in the 505 to generate line breaks in the display.
- Include publisher name related to publisher number (028 \$b) in publisher index.
- Index musical flat and sharp sign characters.
- Hyperlink genre headings within the genre index.
- Create a dedicated medium of performance index and provide command-line searching for it. Explore best way to provide non-command line searching, including facets, advanced search drop-down, and any other possibilities.
- Display 382 fields as recommended in “WorldCat Discovery Display Preferences for Medium of Performance.”<sup>27</sup>
- Display subfield \$i in 7xx fields.

### **Enhancements**

- Create alternate display for “view online” button for non-print resources, such as audio databases.
- Create a browse index for publisher number (028 \$a).
- Include name headings from 7xx author fields in the author facet; complex relationships reflected in these fields require further analysis of which names are appropriate to include.

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<sup>27</sup> Rebecca Belford, “WorldCat Discovery Display Preferences for Medium of Performance,” Music OCLC Users Group, April 23, 2015, [http://musicoclcusers.org/wp-content/uploads/WCD\\_Medium\\_Report\\_201504291.pdf](http://musicoclcusers.org/wp-content/uploads/WCD_Medium_Report_201504291.pdf).