



MUSIC OCLC USERS GROUP

# NEWSLETTER

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## **FROM THE CHAIR**

**Bruce Evans  
Baylor University**



What an exciting time for our organization! We find ourselves in year where we will enjoy having a joint meeting with our OLAC colleagues, this time in Kansas City, October 23-26, 2014. Please flip through the ensuing pages for further information on this wonderful opportunity to learn from and interact with members of both organizations. We hope to see many of you there!

Since this year features a joint-meeting with OLAC, the Board has the practice of holding its "Summer" Board meeting at the conference location -- rather than making our usual trek to Columbus, Ohio -- which we plan on having immediately following the conference's conclusion Sunday morning.

Something that occurred to the Board, though, in confirming our plans to meet in Kansas City is that late October really is pretty far along in MOUG's calendar. There are many matters that really need discussion before then. So in the interest of sufficiently covering more time-sensitive Board matters, we decided to hold a conference call, which took place August 11. See below for highlights.

The Board spent a lot of time discussing the report and recommenda-

tions of the Financial Planning Working Group (FPWG). The FPWG worked solidly from just shortly after the Atlanta Conference, and right up until just before our conference call. Their hard work and dedication definitely shows through in the report, as it contains solid, thoughtful, and bold ideas to further solidify and strengthen MOUG's long term financial strength. I would like to once again thank Neil Hughes (Chair), Stephen Luttmann, Mark Scharff, Casey Mullin, and Nara Newcomer for their incredible work in crafting this report. Please keep an eye out for further information concerning both the report itself, and the directions we take vis-à-vis the report.

We also dedicated a lot of time towards discussing planning thus far for of our 2015 meeting in Denver. As our Continuing Education Coordinator's report attests, this meeting features enhanced content through an extended program schedule, with no additional registration cost. Please check Michelle's column for more information. I wish to offer my thanks to Michelle and the Program Committee for their dedicated and thoughtful work on this extended program.

The Board approved the slate for this fall's election, put together by this

*(Continued on page 3)*

# MUSIC OCLC USERS GROUP

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## MISSION STATEMENT

The mission of the Music OCLC Users Group (MOUG) is to identify and provide an official means of communication and assistance for those users of the products and services of the Online Computer Library Center, Inc. (OCLC) concerned with music materials in any area of library service, in pursuit of quality music coverage in these products and services.

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Thanks to all who contributed to this issue. The Newsletter is a publication of the Music OCLC Users Group. It is published three times a year: June, September, and December. Editor: Mary Huisman, University of Minnesota Libraries, 160 Wilson Library, 309 19th Ave. S., Minneapolis, MN 55455.

Communications concerning the contents of the Newsletter and materials for publication should be addressed to the Editor. Articles should be submitted electronically in Word. Articles should be consistent in length and style with other items published in the Newsletter. Permission is granted to copy and disseminate information contained herein, provided the source is acknowledged. Correspondence on subscription or membership (including change of address) should be forwarded to Nara Newcomer, MOUG Treasurer, Head of Music/Media Library, University of Missouri-Kansas City, G3C Miller Nichols Library, 800 E. 51st St., Kansas City, MO 64110-2499. (Dues in North America are \$30.00 for personal members, \$40.00 for institutional subscriptions; outside North America, \$45.00 for personal members, \$50.00 for institutional subscriptions; back issues for the previous two years are available from the Treasurer for \$5.00 per copy.) A copy of the quarterly financial report is available from the Treasurer on request. Please note that subscriptions, once placed during the annual renewal period, may not be canceled, and no refunds will be given.

The Music OCLC Users Group is a 501(c)(3) non-stock, nonprofit association organized for these purposes: (1) to establish and maintain the representation of a large and specific group of individuals and institutions having a professional interest in, and whose needs encompass, all OCLC products, systems, and services and their impact on music libraries, music materials, and music users; (2) to encourage and facilitate the exchange of information between OCLC and members of MOUG; between OCLC and the profession of music librarianship in general between members of the Group and appropriate representatives of the Library of Congress; and between members of the Group and similar users' organizations; (3) to promote and maintain the highest standards of system usage and to provide for continuing user education that the membership may achieve those standards; and (4) to provide a vehicle for communication among and with the members of the Group. MOUG's FEIN is 31-0951917.

**MOUG-L:** MOUG-L is an electronic discussion list for the dissemination of information and the discussion of issues and topics of interest to music library professionals and users of OCLC products and services. To subscribe to MOUG-L, send an e-mail to [listserv@lsv.uky.edu](mailto:listserv@lsv.uky.edu) with the subject line blank. In the body of the message type: SUBSCRIBE MOUG-L <your name>

**MOUG Website:** <http://www.musicoclcusers.org>

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**CALL FOR NOMINATIONS: 2015 MOUG DISTINGUISHED SERVICE AWARD**

Nominations are now being accepted for the 2015 Music OCLC Users Group (MOUG) Distinguished Service Award. This award recognizes and honors someone who has made significant professional contributions to music users of OCLC. The MOUG Executive Board selects a recipient based on nominations received from the MOUG membership.

Eligibility for nomination is as follows:

Nominees must have made professional contributions that significantly address the needs and concerns of music-oriented users of OCLC's products and services. Nominees may be MOUG members, but membership in the organization is not a requirement. The nomination must be accompanied by a statement that provides supporting evidence of the nominee's qualifications.

The award recipient will receive an engraved plaque containing an inscription recognizing his or her special contribution to the field, complimentary registration for the MOUG meeting at which the award is being presented, and a lifetime complimentary membership to MOUG.

Past recipients of this award are Paul Cauthen (2014; University of Cincinnati), Matt Montgomery (2013; OCLC), Phyllis Jones (2012; Oberlin College), Alice LaSota (2011; University of Maryland), Michelle "Mickey" Koth (2009; Yale University), Charles M. "Chuck" Herrold, Jr. (2007; Carnegie Library of Pittsburgh), Jean Harden (2006; University of North Texas), Ralph Papakhian and Sue Stancu (joint recipients, 2005; Indiana University), Jay Weitz (2004; OCLC, Inc.), Judy Weidow (2003; University of Texas), and Kay Burnett (2002; Smith College).

Nominations should be sent to Marty Jenkins by U.S. mail (120 Dunbar Library, Wright State University, 3640 Colonel Glenn Hwy, Dayton OH 45435) or email (martin.jenkins@wright.edu). Nominations and accompanying statements must be postmarked or received via email no later than October 1, 2014. The Executive Board will select an award recipient at its meeting held during the joint MOUG/OLAC conference.

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### ***From the Chair***

*(Continued from page 1)*

year's stellar Nominating Committee, Sue Stancu (Chair), Molly O'Brien, and Marty Jenkins (Board Representative). For Vice-Treasurer/Treasurer-Elect, the candidates are James Procell (University of Louisville) and Tomoko Shibuya (Northwestern University). For Vice-Chair/Chair-Elect, the candidates are Catherine Busselen (UC, Santa Barbara), and Casey Mullin (Stanford). My thanks to the Nominating Committee for putting together a solid slate, and also to the candidates for agreeing to run! Please watch closely for information later this fall concerning election specifics.

The effort to redesign MOUG's website presses on. The Web Implementation Task Force, the successor to the Web Visioning Task Force, is currently evaluating a number of potential CMSs and other web-related programs that they have narrowed their search down to. Stay

tuned for further developments on that. The group plans to have chosen a CMS sometime in early fall.

And speaking of the Web Visioning Task Force, this issue contains the group's full recommendations (following a summarized version of them sent out over MOUG-L in June). Hopefully this will serve to further increase your anticipation for the day our redesigned website gets unveiled.

As you can see, there are many things to celebrate and look forward to in the life of our organization. Something I would like to celebrate right now is the incredible work my fellow Board members perform on behalf of MOUG. Their level of talent, thoughtfulness, and willingness to help never ceases to amaze me. They, along with all of you, make MOUG the great organization it is.

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**Call for Applications: Music OCLC Users Group (MOUG) Ralph Papakhian Travel Grant**

In 2010, the MOUG Executive Board voted to establish a travel grant in honor of Ralph Papakhian. The grant supports attendance at the annual MOUG meeting and, in recognition of Ralph's mentoring role in music librarianship, is especially intended to support newer members of the profession in both public and technical services.

The award offers first-time MOUG attendees free conference registration for the MOUG annual meeting (February 24-25, 2015, immediately preceding the Music Library Association annual meeting); one year's free MOUG membership including three issues of the MOUG Newsletter; and reimbursement of up to \$200 in associated expenses (lodging, meals, etc.). Up to three awards will be given for the 2015 meeting.

Preference will be given to applicants who are: (1) students, paraprofessionals, or professionals in the first five years of their professional careers; and (2) who are likely to benefit from MOUG's educational opportunities (i.e., those who work with music materials in libraries or in library systems, whether they are music specialists or generalists). Professional and workplace need, financial need, past training and experience, demonstration of initiative, likely further contributions to the profession, and comments from reference letters are also considered. Applicants need not be current members of MOUG.

Applications are due October 17, 2014 and shall consist of a letter that includes a rationale for attending the MOUG annual meeting, an explanation of financial need, a brief vita, and the name of at least one person who will submit a letter (also due October 1) in support of the application.

All application materials shall be sent by e-mail, either as in-text messages or as attachments in .pdf, .doc, or .docx format, to the MOUG Past Chair, Marty Jenkins ([martin.jenkins@wright.edu](mailto:martin.jenkins@wright.edu)). Letters of support shall be sent directly by their authors, not by the applicants.

Applicants will be notified of the outcome by e-mail no later than November 14, 2014, and will be acknowledged at the MOUG 2015 annual meeting.

For more information about MOUG, please see <http://www.musicoclcusers.org>. MOUG has helped train and mentor dozens of music library professionals, and has helped shape the OCLC products and services we use every day. Please help distribute this announcement as widely as possible.

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**Correction**

On p. 8 of the June *MOUG Newsletter*, in the summary of the lightning round presentation, "Something Old and Something New," the name of the cellist/composer should be corrected to Lev Aronson.

The Editor apologizes for this error.

## FROM THE CONTINUING EDUCATION COORDINATOR

**Michelle Hahn**

**Southern Methodist University**



What a great pleasure it is to be working for MOUG in the capacity of Continuing Education Coordinator! This opportunity has already proven itself as a meaningful experience, as I have gained deeper insight into what everyone loves about this organization. I am truly hoping to turn your desire for pertinent training and content into excellent programming!

### OLAC-MOUG 2014

First on the docket is the joint OLAC-MOUG conference, being held at the Kansas City Marriott in Kansas City, Missouri, October 23-26, 2014. This year's joint conference, titled "A/V Cataloging at the Crossroads," is preceded by a NACO-AV pre-conference workshop. The conference proper is chock full of instructional sessions on cataloging all of our favorite "weird" formats including 3D objects, maps, scores, and video and sound recordings. But even more importantly...3 breakfasts and 1 lunch included in the cost of registration!

### MOUG 2015

In an effort to make MOUG even more worth your time and money, we are extending our annual meeting into a full day and a half for 2015. Starting Tuesday morning, February 24, we plan to offer in-depth training on the use of the new medium of performance and genre/form thesauri, followed by an increased number of plenary sessions, lightning rounds, and hot topics. Wednesday will continue with the same, and conclude with the business meeting and smaller group events such as NMP and expert community sessions.

The 2015 Program Committee is hard at work hashing out the details, and is always glad to hear from you! Got an idea for a lightning talk, or a burning question you would like us to address? Let us know! [michellek-hahn@gmail.com](mailto:michellek-hahn@gmail.com)

**NEW IN 2015 -- EVEN MORE  
BANG  
FOR YOUR BUCK!**

MOUG is teaming up with the MLA BCC to provide in-conference training on the new LCMPT/LCGFT, with some familiar faces. Plus, you will get even more of your favorite MOUG programming!

Join us in Denver for the 2015 meeting...  
now with more MOUG!

## **Web Visioning Task Force: Recommendations Summary**

### **Introduction**

At the 2013 Summer Board Meeting, the Board engaged in a general discussion about the state of MOUG's website. In recognition of the many capabilities of present-day websites, the Board discussed many possible roles for our website, such as serving more robustly as the organization's online presence, becoming a "destination" site, and filling a niche for music cataloging questions and resources. Indeed, while MOUG's website has a storied history of diligently serving our needs with many talented and dedicated Web Keepers, MOUG's website remains largely in the Web 1.0 era, displaying very little interactivity. The current Web 2.0 world holds enormous possibilities for our website to serve as a destination resource for the music cataloging community.

With all of this in mind, the MOUG Board authorized the creation of the MOUG Web Visioning Task Force, with the following charge:

"To develop a vision and strategic direction for a redesigned MOUG website that will provide a dynamic online presence for the organization, a venue for sharing community practice for music cataloging, an interactive resource for resolving real-world cataloging questions, a tool for furthering MOUG's mission of promoting and optimizing OCLC products relevant to music users in both public and technical services, and a showcase for documenting the activities and history of MOUG."

MOUG Chair, Marty Jenkins, officially appointed the Task Force membership in August, and the Web Visioning Task Force began its work. After copious research, including analyses of peer organizations' websites, we arrived at the recommendations that follow.

### **Recommendations**

We, the Web Visioning Task Force, humbly put forward the following recommendations for consideration. We shall organize them into two major themes: 1) Presentation and Navigation, and 2) Interactivity.

#### 1) Presentation and Navigation

These may seem like two separate categories, but navigation totally depends on the presentation and layout of a given website.

- **Recommendation: Create pages that both strive for aesthetics, and feature menu choices that represent overall categories, areas of interest.**

As pointed out in our website study findings, clutter was a big complaint in areas concerning both content and navigation. We found that text-heavy pages and overwhelming menus and sidebars distract the visitor, thereby slowing down the search for information. (Think of the five-second rule.) Indeed, most websites already have all of the content a user needs, so bulky menus and lots of text present the biggest obstacle to successfully obtaining desired information.

The first step to ameliorating this problem involves aesthetics of a website, and the biggest aesthetic consideration surrounds "busyness". Users feel drawn to websites that feature cleaner design, where expected content, such as a well-placed search box, "about" information, member resources, and events jump right out at the user upon arrival at the front-page. Both the selectivity of text included, and overall attractiveness through use of warm, inviting colors and icons go a long way towards making any website a desired destination. (The screen shots of the new and old MLA website in our appendices illustrate this quite nicely.)

Then, focus on the efficient presentation of this information. Our redesigned website will feature a lot of useful content. However, this content should not demand a lot of scrolling, scanning, or skipping around. We should definitely strive to avoid having redundant navigation menus, mysterious and out of place content, or, worst of all, dead

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## *Web Visioning Task Force Recommendations, continued*

links. The best sites have figured out ways to present a lot of information in a condensed and focused way. Tightly structured menus and subpages will achieve this goal.

- **Recommendation: Make sure the information, menu choices, etc. are relevant and current.**

A very concrete way to realize this recommendation involves avoiding the presence of redundant, outdated, and trivial (ROT) content on the site. MOUG can feature effective aesthetics, presentation, and navigation, but if the underlying content does not appropriately serve our users' needs, we have not achieved our goal. A tool that could prove useful to revealing ROT content is performing a content audit, which inventories off the site's current content, and gets tracked in an Excel spreadsheet.

Of course, everything mentioned thus far in our recommendations requires the steadfast dedication and resolve of MOUG to update the website on a regular and frequent basis to avoid the presentation of obsolete data. Some options the Board may consider include using social media, successfully utilized by many library organizations, to present the latest news, or creating a MOUG website team, with the Web Keeper as the team leader, to put as many people as possible working to keep the website current.

### 2) Interactivity

A few introductory comments on the importance of this specific aspiration: In recent years, MOUG has made it a major priority to make our organization the preferred destination for music cataloging-related questions. Up to this point, the primary focus of this effort has been MOUG's list: MOUG-L. The numerous discussions over the past year on MOUG-L concerning RDA-related music cataloging best practices attest to its success.

That said, listserv messages tend to be highly ephemeral. In order for them to have permanence, the individual subscriber must take it upon herself to archive discussions. Furthermore, listservs have varying practices on providing searchable archives, of which MOUG does not currently offer. Even among listservs that have searchable archives, many require logins, and also have navigation features that are less than intuitive. So to accomplish MOUG's objective to be the preferred destination for the "music expert community," we must

look beyond our list.

Therefore, we believe that making the MOUG website a truly interactive resource for resolving real-world cataloging questions will go the furthest towards realizing the aspirations expressed in our charge. We shall present below our recommendations to achieve this, some with further comment, others not.

- **Recommendation: An exhaustive archive of Jay Weitz's Q&A columns, as well as extensive references to the Music Cataloging Bulletin.**

This would essentially create a "one-stop-shop" for all extant music cataloging advice produced over the years by these two publications. No more culling through individual issues to find that conversation about the 028 field. Everything would be located in a single file. N.B. We would need to secure an agreement with the Music Cataloging Bulletin to fully realize this goal, especially if we wanted to provide access to full text.

- **Recommendation: A robust search mechanism to search Jay's Q&A, the Music Cataloging Bulletin - as well as for the rest of the website -- employing relevance ranking and fuzzy matching.**

This would prove especially useful for the growing number of catalogers who only perform music cataloging more infrequently, not every single day. Moreover, cataloging terminology has changed a lot over the years, so relevance ranking and fuzzy matching would come in especially handy to bring together content in which different terms are used to refer to the same concept.

- **Recommendation: A wiki-like environment for catalogers to post questions, hold discussions and organize the collective wisdom on current and historical music cataloging practices.**

This objective holds all kinds of promise, and task force members exhibited a great deal of enthusiasm towards it. This would preserve the knowledge generated by music cataloging-related discussions (currently held on MOUG-L, MLA-L, and also OLAC-L to a certain degree), centrally locate these discussions in a single place, and enable easier recall of those discussions.

Fortunately a number of models already exist that prove worthy of exploration. Wikipedia uses MediaWiki software. The technical troubleshooting sites StackOverflow (<http://stackoverflow.com/>), or Reddit's r/techsupport page

## Web Visioning Task Force Recommendations, continued

(<http://www.reddit.com/r/techsupport>) provide examples of a post-and-comment format well-suited for questions and answers. These latter two sites also offer “upvoting” functionality, or tools that recommend certain responses and marks a question as “solved” or “answered.” We could use tags or designated category areas to further organize discussions.

We could make these features even more sophisticated by having historical and discussion pages, as well as a canonical article reflecting the most up-to-date collective thought on an issue. These latter features are exemplified by Wikipedia: [http://en.wikipedia.org/wiki/Wikipedia:Manual\\_of\\_Style](http://en.wikipedia.org/wiki/Wikipedia:Manual_of_Style).

And finally, Mickey Koth’s site Music Cataloging at Yale: <http://www.library.yale.edu/cataloging/music/musicat.htm> possesses incredibly rich and robust music cataloging-related content. In addition to using it as a model for MOUG’s site, we may even want to provide links to, or even borrow, some of its content.

If these features and rich content were available through MOUG, catalogers may abandon the listserv approach. Moreover, the simple act of posting a reply on a “wiki” may inspire greater participation by the whole community, as the act of sending out a message to a listserv can come across as a greater effort to some.

- **Recommendation: Identify publicity strategies and tactics for driving traffic to this new site.**

This action strikes us as a fundamental step to realize our charge. Specifically, for decades catalogers have been using listservs, scattered Word documents and PDFs on various websites as their primary tool to ask questions and discuss our most pressing challenges and issues with our work. Advertising our website as the go-to resource anywhere and everywhere will go a long way towards changing music catalogers’ habits to visit our website first.

A change of this magnitude will require a great deal of work to make it happen. In order for our site to have the role as the go-to resource, MOUG will need to “seed”, if you will, the site with robust, highly relevant content. To realize this task, MOUG will need to enlist an enthusiastic and talented group of volunteers willing to be the “pioneer” users to get it off of the ground. Furthermore, to ensure its continuing quality and robustness, MOUG would need to identify some kind of editorial oversight – at whatever level needed – to tighten up style and form of presentation; in short, all necessary quality control.

- **Recommendation: Create one or more intuitive domain names to redirect to this area, or to the MOUG website as a whole.**

Our current URL, musicocclusers, does not strike us as the easiest to remember. Creating domain names which automatically redirect to our website should make it all the more accessible.

### Members of the Web Visioning Task Force

Bruce Evans, Chair  
 Autumn Faulkner  
 Chris Holden  
 Sean Luyk  
 Jennifer Matthews  
 Casey Mullin  
 Tomoko Shibuya

## **OLAC-MOUG Joint Conference 2014**

### **“AV Cataloging at the Crossroads”**

**Kansas City, Missouri**

October 23-26, 2014

The 2014 Joint Conference of the Online Audiovisual Catalogers (OLAC) and the Music OCLC Users Group (MOUG) will be held **October 23-26, 2014** at the **Kansas City Marriott Country Club Plaza**. The hotel, in the heart of Kansas City, overlooks Country Club Plaza, a premier shopping and entertainment district.

The University of Missouri-Kansas City will host the conference. Other local sponsors include the University of Missouri-Columbia, Kansas State University Libraries, the Kansas City Public Library, and the Johnson County Library. Local attractions include: the Nelson-Atkins Museum of Art, the Liberty Memorial WWI Museum, the Kauffman Center for the Performing Arts, the Arabia Steamboat Museum, the Hallmark Visitors Center, and many others. Questions regarding the conference should be directed to Wendy Sistrunk, Chair, Local Arrangements and Program Committee at [sistrunkw@umkc.edu](mailto:sistrunkw@umkc.edu).

OLAC is an international organization for catalogers concerned with all types of non-print materials. Through conferences, workshops, publications, and e-mail lists, catalogers exchange information and enjoy expert & practical advice on cataloging audiovisual materials. MOUG is a nonprofit organization which provides an official means of communication and assistance for users of the products and services of the Online Computer Library Center, Inc. (OCLC), in the pursuit of quality music coverage in these products and services.

## **2014 OLAC-MOUG CONFERENCE**

### **~ PREVIEW & REGISTRATION INFORMATION ~**

#### **Pre-Conference Tours**

Offered Thursday afternoon, October 23, 2014, a choice of:

Nelson-Atkins Museum of Art  
 Liberty Memorial WWI Museum  
 UMKC Libraries: Marr Sound Archive, Music/Media Library, Special Collections

#### **Pre-Conference Workshop**

“NACO-AV” – Peter Lisius

#### **Sessions**

**Opening Keynote Address**—“Linked Data” -- Philip Schreur

**Closing Keynote Address**—“Where We Are Now With RDA” -- Casey Mullin

Poster Sessions

Lightning Talks

Ask MOUG-OLAC

### Workshops

“3D Objects & 2D Graphics” – Presenter, Julie Moore

“Video Cataloging for the Novice” – Presenter, Jay Weitz

“Advanced Video Recordings Cataloging” including Blu-ray and other oddities – Presenter, Jay Weitz

“Cataloging Audio Recordings with RDA” – Presenter, Mary Huismann

“Scores Cataloging” – Presenter, Margaret (Kaus) Corby

“Map Cataloging” – Presenter, Paige Andrew (4-hour)

“Progress of BIBFRAME” – Presenter, Angela Kroeger

For a full description of the sessions, information about the presenters, registration and hotel information, please visit the 2014 OLAC-MOUG Conference Website <http://olac2014.weebly.com/>.

**Note:** Registration materials will not be sent by mail; please register online or print out the registration form and send to the address provided.

#### Conference Organizers

**Wendy Sistrunk**, Chair, University of Missouri--Kansas City  
**Richard Baumgarten**, Johnson County Library, Kansas  
**Merry Bower**, Kansas State University  
**Margaret Corby**, Kansas State University  
**Felicity Dykas**, University of Missouri--Columbia  
**Michelle Hahn**, Southern Methodist University  
**Mary Huismann**, University of Minnesota  
**William (Mac) Nelson**, University of North Carolina at Greensboro  
**Evelyn Pypes**, Kansas City Public Library  
**Kathleen Schweitzberger**, University of Missouri--Kansas City  
**Michelle Turvey-Welch**, Kansas State University

#### 2014 OLAC-MOUG Conference ~ Roommate Matching ~

Roommate matching is now available. Please e-mail Wendy Sistrunk at [sistrunkw@umkc.edu](mailto:sistrunkw@umkc.edu) with your request (indicate “roommate matching” in the subject line). The roommate service does not make hotel reservations. When you receive your roommate’s name, you are responsible for contacting the other person. OLAC and MOUG assumes no liability for matching roommates. Include the following information:

Name  
 Affiliation  
 Gender  
 E-mail  
 Phone  
 Arrival date  
 Departure date  
 Have you already made a room reservation?  
 Other information (need an accessible room, early riser, etc.)

*(The Marriott is a non-smoking hotel.)*

**2014 Annual Meeting Plenary Session II: RDA and Authorities  
Pre-Submitted Questions**

Responses Prepared by:

*Kathy Glennan, University of Maryland  
Jean Harden (University of North Texas)  
Morris Levy (Northwestern University)*

1. I created an authority record for a work with a distinctive title that has been arranged for another medium. It didn't make sense to me to include "arranged" in the preferred title in the AR. In the 670 I mentioned that the program notes in the resource in hand indicated it was an arrangement and listed the original medium. I included a 382 field for the *original* medium, since that is the medium for which the preferred title is for. In other words, I created an AR for the work, not the expression. Would any of the esteemed members of panel done this differently?

**Answer:** No.

2. I cataloged a resource that included two arranged excerpts from a larger work, a ballet. The expression was given a title that covered both, for example: Adagio and Andante for bassoon and piano. The adagio is from one act of the ballet and the andante is from a different act. Both parts of the ballet have distinctive titles. When I create the ARs for the two, how would I use the title proper of the expression and in which AR would it be included as a VAP?

1st AAP: 100 1\_ Name. \$t Ballet title. \$p Distinctive title of one part; \$o arranged

Possible VAP: 400 1\_ Name. \$t Adagio, \$m bassoon, piano

2nd AAP: 100 1\_ Name. \$t Ballet title. \$p Distinctive title of the other part; \$o arranged

Possible VAP: 400 1\_ Name. \$t Andante, \$m bassoon, piano

Would I use "Adagio and andante, \$m bassoon, piano" in either AR?

**Answer:**

The cataloger needs to make some decisions here. Does the manifestation represent one or two expressions? What level of access are you looking to provide to these excerpts?

If you consider the manifestation represents one expression, use:

100 1\_ Name. \$t Ballet title. \$k Selections; \$o arranged

400 1\_ Name. \$t Adagio and andante, \$m bassoon, piano

If you think that the manifestation contains two expressions, you would not use "Name. \$t Adagio and andante, \$m bassoon, piano" as a variant title in either authority record, although it would be referenced in the 670s.

3. I would appreciate a definitive answer: if the key is known or can be determined, is it included in an AAP with a generic title, regardless of the period of composition or whether or not it was stated on the resource or other source? Similarly, when I encounter an AAP with a generic title for a pre-20th century work in an AR that doesn't include a key, may I update the AR?

**Answer:**

Yes, add the key if it can be determined. Remember that one of the conditions for recording Key enumerated in 6.17.1.3 is that "it is apparent from the resource described (unless it is known to be transposed in the resource)." RDA has no chronological requirement. In terms of access points, 6.28.1.9 seems pretty clear that the key element should appear in access points representing musical works with titles that are not distinctive; an authority record meeting these conditions but lacking the key could be considered "RDA compliant" but not RDA. Thus it would be appropriate to consider adding the key as part of evaluating existing authority records for upgrade to RDA.

4. What parts of RDA and which LC-PCC Policy Statements or Best Practices can/should be brought to bear on the following situations:

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**RDA and Authorities Questions, continued**

a. Title consists of a word meaning Song or Lied (er). The work is for solo voice with accompanying instrumental ensemble consisting of violin, viola, clarinet, and piano.

**Answer:**

6.28.1.2 Musical Works with Lyrics, Libretto, Text, Etc. (Preferred title)

6.14.2.5 Preferred Title Consisting Solely of the Name of One Type of Composition and the LC-PCC PS to that rule: "Record the accepted form of name in English if the name has an English cognate form or if the same name is used in English"

6.28.1.9 Additions to Access Points Representing Music Works with Titles That Are Not Distinctive (add medium)

6.15.1.12 Accompaniment for Songs, Lieder, Etc. (how to construct the accompaniment statement)

6.15.1.7 Accompanying Ensembles with One Performer to a Part – after the example block: "Record 'instrumental ensemble' for an accompanying ensemble with one performer to a part consisting of instruments from two or more families of instruments when a more specific term is not available.

**Result:**

Songs, instrumental ensemble accompaniment OR Lieder, instrumental ensemble accompaniment (If your preferred title is something else, use that.)

**Note:**

With the changes to 6.15 coming in the April 2014 Update to the RDA Toolkit, the following option will be available in 6.15.1.6 (formerly 6.15.1.7):

For an accompanying ensemble with one performer to a part, record the appropriate term for each instrument of the accompanying ensemble instead of the name of the ensemble.

However, you would still record the ensemble name in the AAP per 6.28.1.9.1.f:

For an accompanying ensemble with one performer to a part, record the appropriate term for the ensemble (see 6.15.1.6) rather than the

individual instruments.

b. Title is distinctive but requires qualifier to break a conflict. Work is for solo voice with accompanying instrumental ensemble consisting of violin, viola, clarinet, and piano.

**Answer:**

6.28.1.2 for Preferred Title

6.14.2.3 Choosing the Preferred Title for a Musical Work and 6.14.2.4 Recording the Preferred Title for a Musical Work

6.28.1.10 Additions to Access Points Representing Musical Works with Distinctive Titles – add medium or another distinguishing characteristic of the work (the example straight from AACR2 with ", orchestra" or ", piano"; or "(Opera)" or "(Piano work)")

If you choose to add medium, note that this is not something titled Song or the like, so you would record the whole medium in the order prescribed by 6.15.1.3. Use 6.15.1.10 to get a term identifying the voice, then "piano", then the strings in score order ("violin, viola")

c. How would each situation change if the accompanying ensemble were larger, e.g. saxophone, flute, oboe, 2 violins, viola, 2 trombones, cello, double bass, and 2 percussionists?

**Answer:**

Size of ensemble would not affect the situation.

However, keep in mind the soon-to-be available optional instruction in 6.15.1.6 described above. This only affects recording of elements, not the authorized access point.

d. Are there *any* circumstances under which it would be correct to use the term "instrumental ensemble" in an authorized access point for a vocal work for solo voice?

**Answer:**

As the text of RDA stands right now, you can use "instrumental ensemble accompaniment" if the preferred title is Songs, Lieder, etc. (The LC-PCC PS to 6.15.1.12 has an example with "instrumental ensemble accompaniment.") If the preferred title is something else, you would not use "instrumental ensemble." Note

that this instruction will still exist in the April 2014 RDA Toolkit Update, but it will be relocated to 6.28.1.9.h.

5. MARC tags 372 and 374 allow us to describe the fields of activity and professions of individuals, and LCSH is rich in terminology to help us in that regard (though it is lax in some areas, e.g., there's no "Piccolo players" yet, so one has to enter "Piccolo player," singular, in a 374 field with no subfield \$2). However, there seems to be no effort to describe corporate bodies' fields of activity or essential natures to the same degree using MARC tag 368 ("Other Attributes of Person or Corporate Body"). Very few NACO-Music catalogers (or LC either, for that matter) seem to be using the 368 to any degree, and that seems to be a disservice.

LCSH is weak when it comes to terminology describing the many different kinds of "classical" performing groups out there, perhaps because those terms are too easily confused with the music the groups play. So while we do have "String quartets (Musical groups)", we don't yet have "Woodwind quartets (Musical groups)" in LCSH. There may be insufficient literary warrant (no one has written or published a book about a famous woodwind quartet? quite possible), but it seems now like there may be an opportunity to create such strings and establish them within LCSH merely because they would be convenient to use in MARC tag 368 subfield \$a in authorities data. Also, the corresponding terminology for the music those groups play will soon be retagged as 155, with mediums of performance from qualifiers (or implicit mediums) all headed off to the 382, leaving the 150 fields free for topical headings describing the different standard forms of chamber music ensembles and other such entities.

Popular music is ahead of the curve, probably because there is so much literary warrant. The racks at Barnes & Noble's music section are filled with books about "Rock groups," which is established LCSH. Not so full of books about "Chamber orchestras."

Bottom line, after all that: is there any move afoot to address this, or does anyone else even see it as a gap in the more-granular metadata we're trying to create, following FRAD principles? And is there any provision being considered for entering free text in the 368 without using a subfield \$2, as there is in the 374?

**Answer:**

The Descriptive Cataloging Manual Z1 states a preference for using terms from a controlled vocabu-

lary in Field 368; most people are using LCSH terms when available. Free text is an option, but it should be your last choice.

It's possible that the continuing development of music-related thesauri (LCMPT, LCGFT) will help in expanding controlled vocabulary terms that will be more useful than what's currently available in LCSH.

6. Under AACR2, I sometimes punted with authorized access points. Recently I dealt with a CD of polyphonic chansons from the 1300s and 1400s by composers I'd never heard of. The authority file had records for their names and nothing else. I didn't stand a chance of determining what the preferred title for each of the pieces should be; there is no information with which to do so. So I punted, making 700s for just the composer's names. I consoled myself that likely users of this CD would probably be happy with any piece by these composers of which we know so little. At least I could get the names out there. There have been other situations where I have chosen this route. Under A2, I've added the relator code \$4 cmp in such cases.

a. Under RDA, can I do the same thing when I'm clueless? Would I just use \$e composer, the relationship designator from App. I?

**Answer:**

RDA does not require authorized access points for every work in a compilation. You are only required to name the compilation itself (RDA 6.27.1.4). Thus, one way to think about this situation is that you have multiple composers associated with a work (the compilation). In that case, Chapter 19 applies. This is kind of a stretch, but if you think creatively, it might really work in this case.

Another way to "punt" is to give the title as it stands on the CD, after the composer's name of course, with \$i Contains (work) or Contains (expression), as appropriate, preceding the whole thing. This would go in a 700 12. If the work recorded is anonymous, one would use 730, also with \$i. This method might be useful if your patrons would be helped by having the title of the work present.

b. And since I brought up \$i (Contains work), what if the authorized access point is collective, e.g., Instrumental music. Selections? Is the relationship designator then (Contains works)? That option is not in RDA.

## RDA and Authorities Questions, continued

### Answer:

The panel could not reach consensus about the appropriateness of using a collective access point in a 700 field under RDA. However, in any case, you should not be pluralizing the subfield \$i term in this example.

7. Under AACR2, the prescribed order for additions to uniform titles was:

- \$o arranged
- \$s format
- \$l language
- \$k Selections

The exception to this was that \$o arr. followed \$k Selections when it was the last element.

Is this still the order under RDA? I have found inconsistent practice:

2013560511  
100 1\_ Bortnianskiĭ, Dmitriĭ Stepanovich, ‡d  
1751-1825, ‡e composer.  
240 10 Faucon. ‡l Ukrainian. ‡s Vocal score

n 2010019123  
100 1\_ Schütz, Heinrich, ‡d 1585-1672. ‡t  
Beckerscher Psalter, ‡m voices (4), continuo. ‡k  
Selections. ‡l English; ‡o arranged

nr 99031915 [upgraded to RDA]  
100 1\_ Palestrina, Giovanni Pierluigi da, ‡d  
1525?-1594. ‡t Nunc dimittis, ‡m voices (5). ‡k  
Selections. ‡l English; ‡o arranged

Are these just mistakes or does language now precede format and arrangement?

### Answer:

The first thing to remember is that *Selections* is now considered a work attribute; thus it comes first in the list above. Note that RDA doesn't prescribe an order here. A majority of the panel recommends following the order of the RDA instructions themselves to inform the order of the subfields in the authorized access point. This would result in \$k \$o \$s \$l (Selections, arranged, format, language). However, there are reasons to consider continuing to place "arranged" at the end, so further work should be done to codify this practice, either in the MLA Best Practices or the LC-PCC Policy Statements.

8. A question about access points for arrangements:

Here is the scope of what is considered to be an arrangement under RDA:

### 6.28.3.2 Arrangements, Transcriptions, Etc.

The instructions at [6.28.3.2.1](#)–[6.28.3.2.2](#) apply to an arrangement, transcription, etc., of one or more works of one composer (or of parts of one composer's works) if the arrangement, transcription, etc., falls into one or more of the following categories:

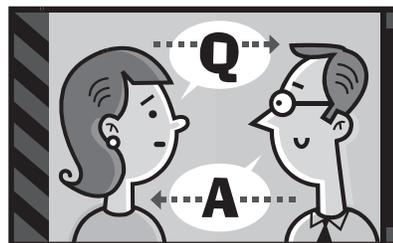
- a) arrangements, transcriptions, versions, settings, etc., in which music for one medium of performance has been rewritten for another
- b) simplified versions of previously existing musical works.

Category b specifies simplified versions. Does this mean that we can no longer consider elaborations to be arrangements?

For instance, Leopold Godowsky made a "concert version" of Albeniz's *Tango from Espana*, op. 165. Both the original and the concert version are for piano, but the concert version is more elaborate. Under AACR2, it would have been proper to call this an arrangement, but that doesn't seem to be the case under RDA.

### Answer:

The instructions in RDA 6.28.3.2 are not significantly different from AACR2 21.18. The application of these instructions requires the same kind of analysis and decision-making, and the panel believes that both AACR2 and RDA lead you to the same basic result in this case. Elaborations are not addressed by either cataloging code; perhaps a rule revision proposal should be developed to address this situation. In the meantime, perhaps the composer/arranger's intent should be taken into consideration: Godowsky apparently considered this an arrangement himself: his title includes Albeniz's own opus number.



## NEWS FROM OCLC

Compiled by Jay Weitz

### Connexion Client 2.51 is Released

Connexion client 2.51 is now available for download from the Software download area of Product Services Web (<http://psw.oclc.org/software.htm>). All Connexion client 2.40 libraries must upgrade to either Connexion client 2.50 or 2.51 by 2014 July 31. An upgrade warning message will begin appearing when you start version 2.40 beginning in June 2014. View the upgrade instructions (<http://www.oclc.org/content/dam/support/connexion/documentation/client/gettingstarted/gettingstarted/gettingstarted.pdf#page=32>) before installing version 2.50 or 2.51. This new version of Connexion client resolves an export problem with characters listed below for libraries that export with MARC-8 character encoding:

- Latin capital letter D with stroke.
- Latin small letter D with stroke.
- Latin small letter dotless I.
- Latin capital letter L with stroke.
- Latin small letter L with stroke.
- Latin capital ligature OE.
- Latin small ligature OE.
- Latin capital letter O with horn.
- Latin small letter O with horn.
- Capital letter U with horn.
- Latin small letter U with horn.

These characters may be viewed in the list of Extended Latin characters documentation on the Library of Congress web site (<http://lcweb2.loc.gov/diglib/codetables/45.html>). There are no other differences between versions 2.50 and 2.51. Connexion client 2.50 users who do not use these characters do not need to upgrade to version 2.51. Both 2.5x versions will continue to be supported. Connexion client 2.50 was released in November 2013. Both 2.50 and 2.51 include the following enhancements which are described in an overview recording (<http://www.oclc.org/support/training/portfolios/cataloging-and-metadata/connexion-client/tutorials/connexion-client-update.en.html>):

- Armenian, Ethiopic and Syriac scripts are now supported.
- New RDA authority workforms for Family and Name Title have been implemented.
- New authority indexes Cataloging Source, Descriptive Conventions, Keyword, and Notes available for searching via the Keyword/Numeric Search drop down lists; these were previously only available via command line searching.
- GenerateAuthorityRecord macro updated to fully recognize the 264 field.
- GenerateERecord macro updated to better handle Unicode characters.
- Help, Useful Web Links list updated to link to OCLC-MARC Records documentation.

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### Education, Learning, and Libraries at a Tipping Point

A new report suggests that the cumulative weight of changing consumer habits, enabling technologies like MOOCs and mobile, and the high cost of postsecondary education are resetting expectations and bringing permanent changes to education and lifelong learning. OCLC has released *At a Tipping Point: Education, Learning, and Libraries*, the latest in a series of OCLC Membership Reports designed to explore emerging trends that impact libraries and librarianship. The report is available to download from the OCLC website at <http://www.oclc.org/en-US/reports/tipping-point.html>. *At a Tipping Point* looks at the views of online

learners—their concerns about the cost of higher education, their experiences with online learning, and their expectations for more convenient, life-based education models in the future. *At a Tipping Point* provides data on consumer attitudes and perceptions about online learning and MOOCs. The report also includes data about parents' and students' perceptions of campus life and their use of libraries—both at the library and online. The report concludes with some thoughts for strategic consideration and action for libraries.

## News from OCLC

### WorldCat Discovery Adds Features

New features in WorldCat Discovery Services (<http://www.oclc.org/en-US/worldcat-discovery.html>) support the unique needs of library staff members who are using the discovery interface. Additional new features added to WorldCat Discovery in June 2014 benefit end-users who use the single search box, need citation assistance, or want to know a specific item's availability status or location in their local library. Group views deliver a view of items available through the consortia or regional groups to which a library belongs. New features added in June include:

- **Staff-specific features:** Staff-specific functionality has been added to WorldCat Discovery to support librarian-specific search needs as they answer reference questions, perform interlibrary loan tasks, and determine acquisitions strategies within the context of knowing what other libraries hold an item. Features added include the ability to see:
  - **OCLC number** in the brief results.
  - **MARC record view** of items if your library maintains up-to-date holdings in WorldCat.

**Libraries who hold an item by OCLC symbol**, and the ability to search by symbol. (The current end-user view displays holding libraries by geographic proximity to the searcher's IP range location.)

The staff-specific features appear in WorldCat Discovery once a staff member logs in with their individual OCLC single-sign-on username and password. Instructions are available at [http://www.oclc.org/content/dam/support/discovery/discovery\\_staff\\_accounts.pdf](http://www.oclc.org/content/dam/support/discovery/discovery_staff_accounts.pdf) to help you set up your staff account, or add WorldCat Discovery authorization to a current account you already use for WorldShare ILL or WorldShare Metadata.

- **Customization now possible for embedded search box:** The embeddable search box added in May 2014 gets even better. Now libraries who use the single search box can customize it to limit to specific items (such as

books or articles), expand to search multiple discipline-specific databases, or scope the search down to WorldCat only in an A to Z listing, for example.

- **Export to RefWorks:** Now researchers can save results from WorldCat Discovery to RefWorks, the powerful online research management, writing and collaboration tool, and citation generator. A "share" icon for each item in a given results set provides a citation export file, so that once researchers find something interesting through the library, they'll always be able to find it again. RefWorks joins End-Note export and e-mail functionality already available.

- **Three optional features now in production:** The item location and real-time availability status, group views, and custom reporting options are all now in production in WorldCat Discovery. These fee-based options let you tailor your discovery service, to add functionality based on what's best for your library and its users.

- **Item location and availability.** Show users what's available in your local library collections (branches, departments, etc.) plus availability status from a local OPAC by adding the item location and real-time availability option.
- **Group views.** Maximize and reinforce the value of your library's group affiliations by adding group views.
- **Custom reporting.** Gain insight into user behavior through customized reports from Adobe® Analytics®.

All of these options require that your library maintains up-to-date holdings in WorldCat. Features coming soon include enhancements to further integrate WorldCat Discovery and WorldShare Interlibrary Loan. These enhancements will build on the staff-specific features installed in June, so that resource sharing librarians can use the staff view of WorldCat Discovery to connect directly to the workflows in WorldShare ILL and/or ILLiad. The WorldCat Discovery interface is available to all current FirstSearch, WorldCat Local, and WorldShare Management Services subscribers as part of existing subscriptions. Libraries are encouraged to start their transition to WorldCat Discovery today at <http://registration.oclc.org/reg/?pc=worldcatdiscovery>.

## OCLC-MARC Update 2014

In May 2014, OCLC implemented changes related to the OCLC-MARC Bibliographic Format Update 2014, Phase One. This included parts of the MARC 21 Bibliographic Update No. 16, dated April 2013, code list additions, and other suggestions from WorldCat users and OCLC staff. Details are available in OCLC Technical Bulletin 263 (<http://www.oclc.org/support/services/worldcat/documentation/tb/263.en.html>). Highlights include:

- All new MARC codes announced by the Library of Congress between April 2013 and March 2014.
- New code “1” (letter “e”) defined for “Format of Music” (FMus; Music 008/20 and 006/03), from MARC 21 Bibliographic Update No. 16.
- New subfield \$3 was defined in Bibliographic field 250, and field 250 was made Repeatable, both from MARC 21 Bibliographic Update No. 16.

Phase Two of the OCLC-MARC Update 2014 was installed in August 2014 and includes the remainders of the MARC 21 Bibliographic, Authority, and Holdings Updates No. 16, 17, and 18, as well as all MARC codes announced by LC between April and June 2014. Highlights include:

- New subfields \$q (Qualifying Information) in Biblio-

graphic (and Authority and Holdings, where applicable) fields 015, 020,024, and 027.

- New subfields defined for Bibliographic and Authority 046 field.
- Subfields \$c (Location of Meeting) made repeatable in Bibliographic and Authority X10 and X11 fields.
- New Authority X62 fields for Medium of Performance Terms.
- New Bibliographic and Authority fields 385 (Audience Characteristics) and 386 (Creator/Contributor Characteristics).
- New First Indicators for the Bibliographic 588 field.
- New Authority fields 672 (Title Related to the Entity) and 673 (Title Not Related to the Entity).  
New subfields \$7 (Control Subfield) in Bibliographic 8XX fields.

Details are available in OCLC Technical Bulletin 264 (<http://www.oclc.org/support/services/worldcat/documentation/tb/264.en.html>). Note that the implementation of some Bibliographic and Authority elements must be coordinated with the Library of Congress and the Program for Cooperative Cataloging.

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## Issues 12 and 13 of *OCLC Research Quarterly Highlights* Now Available

*OCLC Research Quarterly Highlights* is a periodic bulletin that gathers items from the previous quarter of work in OCLC Research, the OCLC Innovation Lab, and the OCLC Research Library Partnership. Issue 12 (<http://www.oclc.org/research/publications/newsletters/quarterlyhighlights/2013-14q3.html>) covers the period of January-March 2013. Highlights include:

- Lorcan Dempsey on where we're going with works and other entities.
- Roy Tennant on technology and infrastructure.
- Three publications released during the quarter.
- A recap of OCLC Research news, events, webinars, and presentations.

- The six themes that shape our work, with a featured activity from each.

Issue 13 (<http://www.oclc.org/research/publications/newsletters/quarterlyhighlights/2013-14q4.html>) covers the period of April-June 2014. Highlights include:

- Lorcan Dempsey on collection directions.
- Ixchel Faniel on sharing and reusing research data.
- Four publications released during the quarter.
- A recap of OCLC Research news, events, webinars, and presentations.
- The six themes that shape our work, with a featured activity from each.

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## News from OCLC

### Changes to Online Bibliographic Save File Aging Process

Note: This change relates to the bibliographic save file only; no changes have been made to the process that automatically deletes authority save file records. Connexion and WorldShare Metadata Record Manager users can save bibliographic records to the online save file so that they can be retrieved and finalized at a later time. The save file is shared across all staff at the library. Each library can save up to 9,999 records. Previously unless records were resaved, master records were automatically deleted from the online save file after 14 days and workforms were automatically deleted after 28 days. *OCLC no longer automatically deletes bibliographic records from the online save file.* Instead, they stay in the online save file until you delete them. This eliminates the need for you to resave records to ensure that they are not deleted before you finish with them. If you lock a master record and save the locked record to the online save file:

- The master record lock WILL continue to expire in 14 days.
- Once the lock expires, the record will be retained in the online save file for your usage without the lock.

- You must continue to resave locked bibliographic records if you wish to extend the master record lock.
- The “expires in x days” information previously reflected the number of days until the record would automatically be deleted.

In the Web-based Connexion browser interface, the “expires in x days” text is now updated to “Lock expires in x days” in records and displays if the record is locked. In the Windows-based Connexion client interface, the “expires in x days” continues to display in records, but the number is not associated with an expiration date; you can ignore this data. To view the number of days until a record lock will expire, view the “Expires” column in the save file list. If your workflow was to resave unlocked records to ensure that they are not deleted, you no longer need to take that extra step. If you use the Connexion client offline local file only, due to concern with records being deleted, consider using the online save file if it meets your needs. If you save records to the online save file and you previously counted on the system to automatically delete them for you, you need to delete the unneeded records.

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### OCLC Research Launches Multilingual Bibliographic Structure Activity

More than half of the 300 million bibliographic records in WorldCat represent resources in languages other than English. These records are clustered together in worksets, which may include multiple bibliographic records for the same title with data elements represented in different languages of cataloging, that is, the language of the metadata used to describe the resource. This information is supplied by catalogers and not transcribed from the resource, such as notes and subject headings. In order to leverage the multilingual content in WorldCat and make it easier for users to identify resources in their preferred language and script, OCLC Research has launched the multilingual bibliographic structure activity to mine the data from translated works, with the goal of improving work clustering, presentation, linked data representations, and to contribute generally to global knowledge. We’re also generating work-translation (“expression level”) records—including the translated title and translator with links to

the original work and the author—and adding them to VIAF (Virtual International Authority File), flagged as “xR”. At the same time, we’re marking up these generated VIAF records using linked data schema so that the relationship of each work with their associated translations and translators can be shared in the Semantic Web. Identifying the records representing translations will enable presenting a work in the user’s preferred language, where available. This work will also enable us to gain a better understanding of the extent information is shared across cultures, e.g., the percentage of non-English works representing translations of English works, and vice-versa. See the multilingual bibliographic structure activity page at <http://www.oclc.org/research/activities/multilingual-bib-structure.html> or OCLC Research Program Officer Karen Smith-Yoshimura’s “Challenges Posed by Translations” hangingtogether.org blog post (<http://hangingtogether.org/?p=3878>) for more details about this work.

## New Report Reorders Ranganathan's Laws

Written by Senior Research Scientist Lynn Silipigni Conaway and Associate Research Scientist Ixchel Faniel, *Reordering Ranganathan: Shifting User Behaviors, Shifting Priorities* suggests that Shiyali Ramamrita Ranganathan's Five Laws of Library Science can be reordered and reinterpreted to reflect today's library resources and services, as well as the behaviors that people demonstrate when engaging with them. Although Lynn and Ixchel believe Ranganathan's five laws are still relevant today, their intent is to help evolve both the work done by librarians and the perceptions of libraries and librarians. By changing how we think about the five laws in terms of interpretation and order of importance, Lynn and Ixchel hope to reflect the current resources and services available for use and the behaviors that people demonstrate when engaging with them. Among the key highlights:

- Today's library users challenge librarians to move from the simple declaration of "save the time of the reader;" meeting today's users' needs requires embedding library systems and services into their existing workflows.

- Our modern-day rephrasing of "every person his or her book" is know your community and its needs.
- The core meaning of "books are for use" is still about access; however, our interpretation focuses on developing the physical and technical infrastructure need to deliver materials.
- Our interpretation of "every book its reader" focuses on increasing the discoverability, access and use of resources within users' existing workflows.
- We agree that "a library is a growing organism" and propose growing users' share of attention.

The objective of this publication is to provide a timely and relevant context for Ranganathan's laws that today's librarians, library researchers, and information scientists can refer to as they think about making changes in practice and developing agendas for future research. This work is an output of the OCLC Research User Behavior Studies & Synthesis theme, which centers on how users engage with technology and content.

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title and translator with links to the original work and the author—and adding them to VIAF (Virtual International Authority File), flagged as "xR". At the same time, we're marking up these generated VIAF records using linked data schema so that the relationship of each work with their associated translations and translators can be shared in the Semantic Web. Identifying the records representing translations will enable presenting a work in the user's preferred language, where available. This work will also enable us to gain a better understanding of the extent information is shared across cultures, e.g., the percentage of non-English works representing translations of English works, and vice-versa. See the multilingual bibliographic structure activity page at <http://www.oclc.org/research/activities/multilingual-bib-structure.html> or OCLC Research Program Officer Karen Smith-Yoshimura's "Challenges Posed by Translations" hangingtogether.org blog post (<http://hangingtogether.org/?p=3878>) for more details about this work.

## News from OCLC

### Changes to Control Headings Function

On June 10, 2014, changes to the controlling function were made as part of a Connexion install. Library of Congress validation records are no longer used for controlling. These are authority records that include the phrase: "Record generated for validation purposes." As of June 9, there were 78,903 authority records containing that phrase in a 667 note. If a heading in a Bibliographic record is controlled to one of those headings and the user executes a Control All command, the heading will be automatically uncontrolled and then attempt to re-control the heading to non-validation authority record(s). It is not necessary to uncontrol the heading before re-controlling in this scenario—the controlling software will automatically identify a heading associated with a subject validation record, and as part of the Control All command will attempt to re-control the heading. The reason for the change to functionality is to work to eliminate incorrect changes to subdivisions, especially related to subfields \$x and \$v, respectively. Over many years staff have worked to decrease the incorrect subdivision code flips, and after extensive tracking found that the remaining problems were related to the fundamental goal of controlling a heading to the fullest possible form. Testing found that eliminating subject validation records from controlling allowed the software to find the fullest forms and ensure that subdivision codes were not changed incorrectly.

- **Changes To Exclude Matching To Validation Records When Controlling:** There are three scenarios that will result when a heading previously controlled to a validation record is attempted to be re-controlled:

- 1) There is no change to the text of the heading, but the authority record(s) associated with the controlled heading have changed. In this situation, a message will be presented in Connexion that reads: One or more headings were controlled and linked. This message will be presented when there is no visible change to the text of the controlled headings.

Heading in bibliographic record is controlled to:

650 0 African Americans \$v Periodicals (sh2007100332)

Heading in the bibliographic record would be controlled to the following two records

as part of the control all command:

650 0 African Americans (sh85001932)  
\$v Periodicals (sh99001647)

- 2) There is a change to the text of the heading based as a result of not using the subject validation records.

Heading in bibliographic record is controlled to:

650 0 Christianity \$z Africa \$x History.

Heading in the bibliographic record would be controlled to the following single record as part of the control all command:

650 0 Church history. (sh85025619)

- 3) The prior fully-controlled heading is left as partially controlled because authority records that are not validation records do not exist for the complete heading. No examples of this type were found during testing.

- **Changes To Disallow Controlling Of Series Headings When 008/12 Equals C:** Not allowing controlling of series to 008/12 = c (series-like phrases). As of June 10, headings in authority records in which 008/12 is equal to 'c' will no longer be controllable. The headings will not be automatically removed from all existing bibliographic records with this change. Headings of this type will be automatically uncontrolled as part of a Control All command.
- **Changes To Exclude Matching To Block Automatic Controlling When 400 Is A Non-Qualified Name:** Previously, if an unqualified personal name heading in a bibliographic record were to match to a 400 field, and the 100 field of the heading were qualified then the heading was automatically controlled. That functionality has changed, and regardless of the form of the heading in the 100 field, an unqualified personal name that matches a 400 field will result in the opening of the control headings window and the user will need to take the appropriate action.

In addition, the problem impacting the incorrect landing location when browsing the LC Names authority index will be resolved in the August Connexion install.

## QUESTIONS AND ANSWERS

Jay Weitz, OCLC



### Contentment in Mediating Carriers

**Question:** I'm reviewing our local non-music sound recording documentation to reflect RDA. One of the AACR2 examples I'm revising is an audiobook of the popular work *Charlie Wilson's war*, referred to in the notes as a "Compact disc, MP3 format" with system requirements: "CD/MP3 player or PC with MP3-capable software." Should 338 use "audio disc" or "computer disc," or both? Should the 337 use "audio" or "computer" or both? These fields are repeatable, but multiple fields ordinarily refer to different media components of the same resource. I'm not sure if multiple fields can refer to the same component, but how to express the situation that different media playback devices could be used for the same resource? I believe the original AACR2 extent was given as "2 sound discs," by the way.

**Answer:** You are probably aware of the document "Best Practices for Music Cataloging Using RDA and MARC21," Version 1.0.1 of which was made available in April 2014 at ([http://www.rdatoolkit.org/sites/default/files/rda\\_best\\_practices\\_for\\_music\\_cataloging-v1\\_0\\_1-140401.pdf](http://www.rdatoolkit.org/sites/default/files/rda_best_practices_for_music_cataloging-v1_0_1-140401.pdf)) from the Music Library Association Biblio-

graphic Control Committee's RDA Music Implementation Task Force. If you check the useful Chapter 3, Appendix, "Guidelines for Describing and Encoding Attributes of Audio Recording Carriers" (beginning on page 44), you will find the recommendations for a compact disc containing MP3 files ("MP3 CD," presumably an MP3 CD-ROM) on page 46. It suggests using "audio" in field 337 subfield \$a and "audio disc" in field 338 subfield \$a. Right below that is the entry for "CD-R" (presumably any rewritable compact disc, judging from the suggestions in the final column, RDA 3.19.3). My inclination would be to follow the CD-R recommendations and account for both the audio and computer aspects in multiple fields 337 and 338 and put "MP3" in field 347 subfield \$b. The MP3 CD and CD-R recommendations are otherwise identical. The three 33X fields are all repeatable and each has subfield \$3 defined so that one can specify which part of the described material the field refers to. Subfield \$3 could be applicable both in cases where there are multiple media carrier types and in cases where there are different encodings that refer to the same part of the resource. In field 336, just as an example, one could specify multiple content types that are all contained on the same disc.

### RDA Shortcuts

**Question:** I feel really dumb about this, but I have been continuing to actually type in each of those new RDA 33X fields. I've been to several workshops where they say that you should just call up some template or macro or whatever and it will plop them in for you. What are they talking about? Are they talking about constant data? (I do know how to do that, and even that would be more efficient than what I have been doing, typing each field in.)

**Answer:** If you are creating an RDA record from scratch, you can set your options to give you RDA workforms. Go up to Tools/Options/RDA and check "Use

RDA workforms when creating new bibliographic records" and/or the corresponding box for new authority records. If you're working with existing records and want to add 33X fields to them, go up to Tools/Macros/Manage and then click on the plus sign to the left of the OCLC line. The "Add33x" macro can be run from there or you can assign it to one of the "User Tools" buttons that you can add to your toolbar. Go up to Tools/User Tools/Assign, click on "Macro" at the top and you'll see the Macro "OCLC! Add33x" to assign it to an unused Tool number. You can also create Text Strings (Tools/Text Strings) or Constant Data (Edit/Constant Data) if you want to create more specific 33X defaults or defaults for other RDA fields (34X, 38X, etc.) that you commonly use.

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## Questions & Answers

### Working on our Relationships

**Question:** Concerning the form of analytic entries (or is it more proper to say recording relationships between works, in this particular case), I notice that in the 700 field, some libraries have the introductory phrase:

\$i Contains (work):

This is also the way the examples appear in the Best Practices for Music Cataloging document. Some libraries don't include "(work)", and looking at RDA, none of the examples I find have that parenthetical phrase. It seems reasonable to just have:

\$i Contains:

I guess if you need to differentiate whether the resource contains a work or a manifestation, it would make sense, but from a public point of view, having just the word "contains" is enough. Is there a right way?

**Answer:** The whole issue of those parentheticals in the relationship designators has been a topic of much discussion, including at the MARC Advisory Committee meeting (MAC is the successor to MARBI) at ALA Midwinter in January 2014. Here is my account of that discussion at MAC.

Discussion Paper 2014-DP04: Recording RDA Relationship Designators in the MARC 21 Bibliographic and Authority Formats (<http://www.loc.gov/marc/mac/2014/2014-dp04.html>).

[www.loc.gov/marc/mac/2014/2014-dp04.html](http://www.loc.gov/marc/mac/2014/2014-dp04.html)).

**SUMMARY:** This paper presents options for recording RDA relationship designators in the Bibliographic and Authority formats to ensure that user-friendly versions of the designators will be available for public display.

**OUTCOME:** Discussion paper was resolved in a manner that does not require a formal proposal. JSC Chair Mr. Gordon Dunsire noted that the JSC is seriously studying Relationship Designators during 2014. Its findings may very well obviate the need for any further action. Strong sentiment was voiced in most quarters for Option 1 ("Issue RDA best practices for display text and rely on existing MARC 21 coding"), which would eliminate the unfriendly (and to users, mysterious) parenthetical qualifiers from Relationship Designators. Because the issue would be dealt with via best practices and existing coding, no proposal was deemed to be necessary.

It seems that the JSC is likely to solve this problem sometime in the not too distant future. If that happens, it is possible that we would be able to retrospectively fix records in WorldCat at some future point. But in the meantime, pending any changes to the MLA RDA Best Practices document, I'd suggest continuing to include those parentheticals.

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### One Three Hundred, Two Three Hundred

**Question:** I'm looking at two records, #843136838 and #805506339. They are clearly duplicates, but I'm not sure which one to keep and which to delete. In the first record there are two 300 fields, one for the score and one for the part. In the second record there is one 300 done in the traditional way with the plus sign. I was looking for guidance in the new "best practices" for music, but it isn't very helpful since it says do it either way. Normally, I'd keep the LC record but they also didn't do the 264 right, putting the distributor in the publisher field. What's your take on

using two 300 versus one for the many, many, many scores with parts that we get?

**Answer:** In the Best Practices RDA 3.4.3, "Extent of Music," the separate 300 fields is the alternative practice, so I sense a preference for the old "space + space" method. But as you say, either one is acceptable. I've merged the two records, fixing the 264s but retaining the two 300s.

## A Sad Truth About Language

**Question:** Is it possible to a search on original language alone in WorldCat or is it always mixed with other types of languages?

**Answer:** Sadly, there is no way to limit a search to original language alone. In fact, field 041 subfield \$h (Language code of original) is not even indexed in WorldCat. This is, at least in part, a legacy of the extremely complex history of field 041. You can get a sense of that complexity by looking at the Content Designator History of field 041 in MARC 21 Bibliographic (<http://www.loc.gov/marc/bibliographic/bd041.html>). Until 1980, when subfield \$h was first defined, the sec-

ond Language Code in a subfield \$a string represented the original language. From 1980 until 2011, subfield \$h also included the languages of intermediate translations as well as original languages. In 2011, subfield \$k was defined exclusively for intermediate translation languages and subfields \$m and \$n were defined for original languages of accompanying materials and of librettos, respectively. In other words, until 2011 there was no single subfield or set of subfields exclusively coded for the original language of a resource. Hard to believe, but true. By the way, "Searching WorldCat Indexes" (<http://www.oclc.org/support/services/worldcat/documentation/searching/searchworldcatindexes.en.html>) outlines all available indexes both by the index and by the MARC 21 element.

## Free the Subfield Three

**Question:** For Hindemith's Sonata for bassoon and piano, would the 336, 337, 338 use plural or singular for "part" in subfield \$3 in RDA? The work contains the score plus the one bassoon part:

336 notated music \$b ntm \$2 rdacontent \$3 score and parts

337 unmediated \$b n \$2 rdamedia \$3 score and parts

338 volume \$b nc \$2 rdacarrier \$3 score and parts

In the "Best Practices for Music Cataloging, v. 1.0, 2/21/2014," I see the example for "Score and parts" with accompanying audio recording but the example is for string quartets and has the four parts. Since the

work I am cataloging has only one part (bassoon), should the terminology be "score and part" or "score and parts" in the 336, 337, and 338?

**Answer:** Although the MARC 33X fields are inspired by RDA, of course, subfield \$3 (Materials specified: "Part of the described materials to which the field applies") is a MARC 21 convention and is not specified in RDA, nor was it specified in AACR2. If you scroll through the RDA Toolkit's "MARC 21 Format for Bibliographic Data Mapped to RDA Elements," I don't think you'll come across a single reference to any subfield \$3 or to "Materials Specified." The contents of subfield \$3 are uncontrolled, free text, so if the materials you are specifying in this instance are a score and a part, singular "part" is perfectly fine.

## Quick, Before we Change the Definitions Again

**Question:** With the recent discussion of FMus codes: Now that code "I" is valid, should we use it in AACR2 records? We are cataloging a collection of sheet music and want to finish it in AACR2, rather than change mid-stream. There's a lot of original cataloging (or using and replacing UKGBM records so they represent something identifiable) and it will take another year or so. Should I

be using the old definitions for FMus values "a" and "z" for these AACR2 records, or use value "I" instead of "a" and the new definition of "z"?

**Answer:** You should be able to apply the new FMus definitions to AACR2 records as well as RDA records.

---

**Questions & Answers**
**Definitely Indefinite About Initial Articles**

**Question:** I have a CD that brings up four records, the title is “And then you shoot your cousin / Roots”. All four of these records have a second indicator of 0 in the 245. The word AND is usually a stop word and when it is the first word in a title the second indicator is usually 4. Has there been some change in rules that allows the word AND to be searchable or should I fix the record I use and report the others to OCLC?

**Answer:** The Second Indicator of field 245 is intended to account for nonfiling characters associated with initial articles at the beginning of titles, not to account for stop words in general. The list of “Initial Definite and Indefinite Articles” can be found in Appendix F of MARC 21 Bibliographic Format (<http://www.loc.gov/marc/bibliographic/bdapndxf.html>), along with a brief explanation of the vari-

ous fields in which indicators are used in this manner. OCLC’s “Searching WorldCat Indexes” (<http://www.oclc.org/support/help/searchingworldcatindexes/Default.htm>) explains both initial articles ([http://www.oclc.org/support/help/searchingworldcatindexes/Default.htm#03\\_Getting\\_Started/Initial\\_articles.htm%3FTocPath%3DGetting%2520started|\\_6](http://www.oclc.org/support/help/searchingworldcatindexes/Default.htm#03_Getting_Started/Initial_articles.htm%3FTocPath%3DGetting%2520started|_6)) and stop-words ([http://www.oclc.org/support/help/searchingworldcatindexes/Default.htm#03\\_Getting\\_Started/Stopwords.htm%3FTocPath%3DGetting%2520started|\\_14](http://www.oclc.org/support/help/searchingworldcatindexes/Default.htm#03_Getting_Started/Stopwords.htm%3FTocPath%3DGetting%2520started|_14)) in its “Getting Started” section. Stop-words tend to be common words (including many initial articles, conjunctions, pronouns, and prepositions) that are disregarded in certain types of searches. Only initial articles (“a”, “an”, and “the” in English, equivalents in other languages), however, are ignored at the beginnings of titles.

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**Vexatious “Vexations”**

**Question:** I’m working on an original Satie score published by Eschig: Vexations : pour piano / Erik Satie. It is a 1 page score that was originally published under the title: Pages mystiques : pour piano, Paris : Éditions M. Eschig, c1969. “Vexations” is one of three titles in this score. Is it still appropriate to add a 775 field for the Reproduction of (manifestation)? What about adding a subfield \$g after the subfield \$t to reflect that this is only part of a larger manifestation?

100 1 Satie, Erik, \$d 1866-1925, \$e composer.

245 10 Vexations : \$b pour piano / \$c Erik Satie.

264 1 Paris : \$b Eschig, \$c 2000.

264 2 [Milwaukee, WI] : \$b Distributed by Hal Leonard Corporation

264 4 \$c ©2000

300 1 score (1 page) ; \$c 30 cm

...

775 08 \$i Reproduction of (manifestation): \$a Satie, Erik, 1866-1925 \$t Pages mystiques : pour piano \$g Vexations \$d Paris : Éditions M. Eschig, c1969 \$w (OCoLC) 71464639

**Answer:** Your question about the 775 has generated a bit of discussion here, so there may not be a definitive answer. Because the linking fields originated generally in serials practice, my colleague Robert Bremer is the expert on them and he’s come down on both sides of this particular fence. On the one hand, he has trouble with the lack of a one-to-one correspondence between the manifestation being cataloged (“Vexations” alone) and the original being reproduced only in part, containing all three of the fragmentary works. On the other hand, there is a certain logic to your use of the subfield \$g for the part title that doesn’t really fit anywhere else; also, as Glenn Patton has reminded me, subfield \$g is often used in the linking fields for volume and/or page data. In other words, your use of subfield \$g for the part title and/or pagination does seem to be at least arguably OK.

## Desperate for RDA in Esperanto?

**Question:** We recently received a third copy of the album *Bells* by Albert Ayler. Two have notes by Dan Morgenstern on the back of the jacket, one with a plain yellow disc and white on black front, the other with a maroon disc and black on white front. The other has a black jacket, no notes, clear vinyl. Quite a number of different color combinations were made; see <http://www.espdisk.com/official/catalog/1010.html>. There is only one record in WorldCat (#3774584), which simply quotes “transparent disk complete on one side” which appears on two of the three jackets. I wish I could say the absence of notes on one of them justifies a new record but I think that is too much of a stretch. Does that sound correct? Is it the best I can do while following the rules to use this master record and add a note, “Issued on discs of varying color”? If it were different book jackets or paper variations, I wouldn’t think twice about putting everything on the same record, but this

seems of more likely interest to potential users. We’re keeping all three because of the color variations. Plus, there’s Esperanto order information on the two that have the notes. What’s not to love?

**Answer:** La elektojn vi faris estas bonaj elektoj. Oh sorry, please excuse my Esperanto (courtesy of Google Translate). The choices you’ve made sound good. The absence of program notes on one copy would not justify a new record, everything else being equal. The variations of vinyl color may be fun and of some historical/archival interest, but again, all else being equal, they strike me as item-specific curiosities appropriate to holdings data and/or local editing. The use of notes with subfield \$5 has been suggested, but if the notes are to be added to the master record, the consideration has to be whether the information is of wider interest.

## RAKing Our Brains

**Question:** What’s up with #878991131? It has field 245 subfield \$h, a supplied 250, and a 300 in German. Its single 500 field is in English. What does 040 subfield \$e, “rakwb” even mean? The record came up when I limited the language of cataloging to English, but I’m not sure why. Should I fix this to an entirely English record and change the 040 subfield \$e? Or put in a new parallel record?

**Answer:** The code “rakwb” is for the German cataloging rules known as RAK (*Regeln für die alphabetische Katalogisierung an wissenschaftlichen Bibliotheken*), which I believe to be the rough German equivalent of AACR, but with an even longer pedigree. (And name, need we add, this being German?) Because the record has no 040 subfield \$b, it is lumped in with English Language of Cata-

loging records (because until fairly recently, the absence of 040 subfield \$b was understood to mean English in WorldCat). The curious 500 notwithstanding, I’d probably consider #878991131 to be a German Language of Cataloging record and would advocate adding the proper subfield \$b. There’s an English language (of both cataloging and description) record #873946324, which matches otherwise in most respects and makes me wonder if the Bärenreiter publication might have multiple-linguaged title pages of some configuration or other. I find <http://www.woodbrass.com/en/woodwind-clarinet-barenreiter-klezmer-for-clarinet-and-piano-p171476.html> online and it seems to fit the bill, at first glance, with parallel English/German other title information on what appears to be a cover. If your resource matches #873946324, maybe edit that and add 040 subfield \$b ger to #878991131?

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## Questions & Answers

### Registering Our Confusion

**Question:** I just picked up a CD that has ® where you would expect the phonogram copyright symbol (©). The face of the disc says © and ®2001. The back of the container agrees. Has anyone ever seen this? Do you suppose it is an error? Or could the company really mean to use the registered trade mark sign? (The label is SGS.)

**Answer:** That just has to be an error. That registered trademark symbol simply makes no sense in that particular context. (Unless SGS thinks it has registered "2001" as a trademark, in which case it might have some serious legal issues with the estate of Stanley Kubrick.) I know how hard this will be for catalogers to believe, but on extremely

rare occasions publishers have been known to err. Thank you to Tracey Snyder (Cornell University) for correcting my initial error in thinking that, according to RDA 1.7.9, you would have to transcribe that inaccuracy as it appears. Tracey wisely and gently reminded me that copyright dates are recorded and not transcribed, meaning that "a cataloger [could] use her common sense as the source of information and record ©2001." If you consider it important for identification or access, you may optionally make a note explaining the situation. In a further response, Kathy Glennan (University of Maryland) reminded us all that, because copyright date is not core in the presence of a publication or distribution date, we could cut the Gordian knot and omit that date all together.

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### Perhaps RDA is Tone Deaf?

**Question:** I am finally trying to get my head around RDA and have created a record. One thing I couldn't figure out how to do was the 384, Key. For some reason it isn't repeatable in the Bibliographic format. I understand why it may be good to have it not repeatable in Authorities, but in the Bibliographic format your record may have multiple pieces and thus would need multiple 384s. Before I consult The LC MARC office, I thought I'd run this by you. In the record I've created, I've just omitted field 384, since it would be misleading to put just A major, when that represents only the first work. Thanks for any insights you have.

**Answer:** Perhaps the MLA "Best Practices" document will make things clearer in time. Given all the examples in the 6.15 to 6.17 range, however, I'd say that the unstated idea is that fields 382, 383, and 384 will be most useful in Authority records rather than in Bibliographic records. Additionally, the fact that neither field 384 nor its subfield \$a is repeatable strongly suggests that it would not be used in any Authority or Bibliographic record that represented more than a single musical work.

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### Making Access a Big Production

**Question:** Is the producer of a sound recording a required field? Many catalogers enter this information; many do not.

**Answer:** Required? No. Permissible? Certainly. A good idea? A matter of cataloger's judgment. There are many record producers past and present (George Martin, Phil Spector, Don Kirshner, Rick Rubin, Timbaland, to name only a few) who are as prominent as many of the

musicians they produce. If you think your users will be interested in access to the name of a record producer, by all means include them in a bibliographic record. Field 508 is the most logical place. RDA Appendix I.2.2 includes the Relationship Designator "producer" for just such access as part of a Authorized Access Point. The RD "producer" is defined as: "A person, family, or corporate body responsible for most of the business aspects of a production for screen, audio recording, television, webcast, etc. The producer is generally responsible for fund raising, managing the production, hiring key personnel, arranging for distributors, etc."

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