Summer is the season for travel, and for the MOUG Board, the time we convene in Columbus, Ohio for our two-day meeting. As usual, during our retreat on August 9-10, we were treated to a visit to OCLC headquarters in nearby Dublin. The flagship Kilgour Building has recently been renovated, and in the pages that follow, you’ll get to see a few glimpses of the breathtaking lobby, which even featured a welcome message for us on the resident jumbo monitor. The purpose of our visit was not just to behold the newly-spruced-up space, however. We also took a meeting with several key OCLC staff: Cathy King, Senior Product Manager, WorldShare Network Experience; Bridget Dauer, Senior Product Analyst, End User Services; and, Cristian Dumitrescu, Senior Product Manager, Global Product Management. The thrust of this meeting was to follow up on the recently-released Joint MOUG/MLA Joint Search and Discovery Task Force report. I won’t steal the thunder of the report itself, which is printed in its entirety in this issue. What I can tell you was that our meeting was extremely productive, both further clarifying for OCLC staff the needs and recommendations of the music community, and reassuring for us to know that OCLC is listening. Our Reference, Discovery and Collections Coordinator Rebecca Belford (who also served on the Task Force) will be following up with Cathy and Bridget in the coming weeks and months, to ensure that this discussion continues, and that improvements to WorldCat Discovery and (soon to be revamped) FirstSearch are brought to fruition.

The Summer Board meeting is also where we finalize the budget, approve the draft program for the upcoming Annual Meeting, and discuss numerous other ongoing initiatives in MOUG land. To give a few highlights… Our Fundraising Czar Stephen Luttmann has been working on executing a donation drive, complete with a pool of matching donors, as well as a “40 for 40” initiative, which will allow members (in North America anyway) to round up their membership dues from $30 to $40 in honor of MOUG’s upcoming 40th anniversary. The Board (Continued on page 3)
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.

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: Jennifer Vaughn, Syracuse University Libraries, 222 Waverly Avenue, Syracuse, NY 13244.

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 Tomoko Shibuya, MOUG Treasurer, Metadata and Discovery Services, Northwestern University Libraries, 1970 Campus Dr., Evanston, IL, 60208. (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@isv.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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From the Chair
(Continued from page 1)

continues in our ongoing assessment of the new website, and have decided upon a suite of content updates, with a particular emphasis on keeping the resources area of the site current and relevant. Lastly, we are crafting a new Social Media Coordinator position, whose incumbent will be expanding our online presence in several new and exciting ways. Stay tuned for more news on these endeavors!

I’d like to thank all of our Board members for their tireless work for the organization, and in particular Jay and his wife Esther, who open their home for our meeting and extend generous hospitality to us year after year.

MOUG Board Visits OCLC Headquarters

Thanks to Rebecca Belford for taking photographs of the MOUG Board’s visit to OCLC’s newly-renovated campus in Dublin, OH.

(Most of) the MOUG Board at OCLC

(from left): Jay Weitz, Nara Newcomer, Tomoko Shibuya, Casey Mullin, Bruce Evans, Molly O’Brien.
The Music OCLC Users Group (MOUG) is now accepting applications for the Ralph Papakhian Travel Grant. 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 a first-time MOUG attendee free conference registration for the MOUG annual meeting (February 21-22, 2017, immediately preceding the Music Library Association annual meeting); one year's free membership in MOUG, including three issues of the MOUG Newsletter; and reimbursement of up to $200 in associated expenses (lodging, meals, etc.).

Preference will be given to applicants who are students, paraprofessionals, or professionals in the first five years of their professional careers; and who are likely to benefit from MOUG's educational opportunities. This includes everyone who works 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 1, 2016 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, Bruce J. Evans (Bruce_Evans@Baylor.edu). Letters of support should be sent directly by their authors, not by the applicants. Applicants will be notified of the outcome by e-mail no later than November 1, 2016.

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.

Past Award Recipients:

2016:
Alyssa Hislop, Stanford University
Rahni Kennedy, Southern Methodist University
Laura Thompson, Central Michigan University

2015:
Anna Alfeld LoPrete, Indiana University
Colin Bitter, Music Library, University of North Texas
Sophie Rondeau, University of Syracuse

2014:
Elizabeth Hille Cribbs, Northern Illinois University
Chris Diamond, Baylor University
Keith Knop, Florida State University
Jennifer L. Vaughn, Syracuse University Libraries
Elin Williams, Victoria Conservatory of Music (British Columbia)
Mark Zelesky, Rowan University

2013:
Claire Marsh, Leeds College of Music
Christina Linklater, Harvard University
Jacey Kepich, University of North Carolina at Greensboro
Karla Jurgemeyer, St. Olaf College
Kristen Heider, Southern Methodist University

2012:
Sonia Archer-Capuzzo, University of North Carolina at Greensboro

2011:
Sally Bauer, New York Public Library
Sandra Schipior, Juilliard School of Music
Tim Smolko, University of Georgia
FROM THE CONTINUING EDUCATION COORDINATOR

Molly O’Brien
Curtis Institute

I am very happy to be serving as MOUG’s next Continuing Education Coordinator. We have an excellent Program Committee (Matthew Ertz, University of Louisville; Rahni Kennedy, Southern Methodist University; Treshani Perera, University of Wisconsin Milwaukee; Jared Rex, College of the Holy Cross; and Daryll Stevens, Colorado College) already hard at work devising a program for the 2017 conference in Orlando.

Thanks to everyone for your insightful and instructive 2016 program evaluations. They were taken into careful consideration and were the beginning of our discussion of program content and scheduling. This year, we continued the tradition of soliciting presentations and topics from the membership and received many excellent proposals. Already on the program are presentations discussing the issues that arise from print on demand, custom printing, and self-publishing and how best to handle them, following the lively discussion at last year’s meeting. The ever-popular lightning talks are back to bring you some of the best cataloging tips, tricks, and tools. Also scheduled is a session on the importance of keeping statistics for library functions and using them to your advantage.

There is so much to cover that there will be a full day of programming on Tuesday as well as a half day on Wednesday. Please consider joining us for at least one of these days even if you have conflicts as one-day registrations are available. However, we hope to see everyone for the entire program! Whether you are a cataloger, public services librarian, or anything in-between, there will be plenty to take away from this year’s content.

Please contact me at molly.obrien@curtis.edu or any member of the Program Committee with questions or suggestions. We also welcome additional ideas for presentations and lightning talks and questions you would like submit in advance for the Ask Everything session.
To whom it may concern:

Shortly after the 2015 annual meetings of the Music Library Association and the Music OCLC Users Group in Denver, MLA President Michael Rogan and (then) MOUG Chair Bruce Evans empaneled a joint 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.”

Attached is the final report of that task force. The boards of both MLA and MOUG have endorsed the report, and are hereby submitting it to OCLC to petition for said specific improvements to WorldCat Discovery Services.

OCLC’s products and services form an integral part of the service apparatus for the vast majority of libraries represented within the music library community. Furthermore, the proliferation of WorldShare Management Services as an end-to-end solution for an increasing number of our constituent libraries means that our organizations must work with OCLC even more closely than we have in the past, in order to ensure reliable and robust access to music resources across the collective collection. The attached report is the latest manifestation of that ongoing effort.

Although music librarians do constitute a specialist community within the OCLC ecosystem, the users we serve form a broad cross section of library users from all walks of life. To wit, these suggested improvements will assist specialist researchers in their targeted searching, but so too will they improve recall, precision and comprehensibility of search results—creating an overall more transparent and efficacious discovery experience—for all users seeking music resources.

We understand that development time is a precious commodity and that there are myriad competing priorities. While full implementation of these recommendations will certainly take time, we would hope OCLC would pledge and demonstrate its earnest and consistent effort towards them. We enthusiastically await OCLC’s response.

Sincerely yours,

Michael J. Rogan
President, Music Library Association

Casey A. Mullin
Chair, Music OCLC Users Group
SEARCH AND DISCOVERY TASK FORCE
FINAL REPORT

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

Task Force Members: Michael Duffy, Western Michigan University (MLA), chair; Tom Bickley, California State University, East Bay (MLA); Laura Gayle Green, Florida State University (MLA); Stephen Henry, University of Maryland (MLA); Carlos Peña, University of Pittsburgh (MLA); Rebecca Belford, University at Buffalo (MOUG); Martin Jenkins, Wright State University (MOUG); Hermine Vermeij, University of California, Los Angeles (MOUG); J. Bradford Young, University of Wisconsin, Milwaukee (MOUG).

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.1 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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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](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/](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
OCLC Search and Discovery Task Force Report

which the subfield $dc$ 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 are see also 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. 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 5c) 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 5c, 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 (St) 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 5c 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. 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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- Are preferred titles (130, 240, 7xx $a with additions, 730) identified or indexed separately from other title access points (245, 246, 740)?
- Is there a separate, additional index for preferred title?
- Are all subfields within a preferred title field linked as a single (bound) search string?
- If access points for preferred titles include names:
  - Do titles in field 240 display with or near the associated name in a 1xx name access point entry?
  - Is a link in field 240 bound to the name in a 1xx name access point (name-title search)?
  - Are links on titles in name-title added entries bound to their associated names?
  - How is a title in a name-title access point displayed in relationship to its associated name? In other words, is it clear who wrote what work?
- If a record contains both name and name-title added entries, how are headings of each type grouped? Does the presence of title subfield ($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 browse 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.” 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.” 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 2nd 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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In this section, Belford posed the following questions:

- Are relator codes ($4$) or relationship designators ($se$) 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 $7xx$ $si$ display? Does all information in $si$ display? (“Based on (work)” versus “Based on,” etc.)?
- Does the presence of $si$ in a $7xx$ field suppress a general $7xx$ field label?
- How is data in $7xx$ $si$ handled in browse, keyword, name, or title index?
- Is there any linking functionality based on the RDA relationships indicated in a subfield $si$ (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.6

Subjects

In this section, Belford posed the following questions:

- Do title headings in subject fields ($630$, $600$ $st$ and subfields) appear under a subject facet? With associated names?
- Are non-topical subject subdivisions ($5v$ $sy$ $sz$) 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.”

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 ($5v$) 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.7

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6 See “Provenance,” in “Searching WorldCat Indexes,” OCLC, accessed May 17, 2015, http://www.oclc.org/support/help/SearchingWorldCatIndexes/#D4_Indexes/Provenance.htm%3FTocPath%3Dindexes%7C

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19 and the 047 $a fields are used to populate a “musical composition” search, available as a command search only.\(^a\)

**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.\(^b\)

**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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\(^a\) See “Genre/Form,”
http://www.oclc.org/support/help/SearchingWorldCatIndexes/#O4_Indexes/Genre_Form.htm%3FTocPath%3DIndexes%7C21 and “Subject,”

\(^b\) Musical Composition,” In “Searching WorldCat Indexes,” OCLC, accessed May 17, 2016,
http://www.oclc.org/support/help/SearchingWorldCatIndexes/#O4_Indexes/Musical_Composition.htm%3FTocPath%3DIndexes%7C56.

\(^c\) “Item bibliographic data as displayed in the WorldCat Discovery Interface,” OCLC, accessed May 17, 2016,
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music cassette. 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. The general material designation (245, subfield 5h) 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” (2xx) generate a limit, facet option, or label? What term is used?
- How is coded language information (008/35-37, 041 5a, 5d) indexed, displayed, or used for limits/facets?
- Are codes for subtitles (041 5j) treated as a primary language for indexing and limits/facets?
- How is coded information about translations (041 510 indicator, 041 5h, 5k, 5m, 5n) used?
- Is coded information for accompanying material (041 5b, 5e, 5f, 5g) or subtitles (041 5j) 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 5j) do not generate a language display. 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.

All notes (5xx)

12 Ibid.
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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 $a$, $d$, $o$, $s$, $p$, $s$), 507 (subfields $a$, $b$), 500, 501, 502 (subfields $a$, $b$, $c$, $d$, $g$, $s$), 504, 540 (subfields $a$, $s$, $b$, $c$, $d$, $s$, $d$), 561 (subfields $a$, $a$, $j$, $s$ – unless 14 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.15

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.16 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.17

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).18 The information in the 511 field is also indexed in the name (or author) index.19

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Recording information note (518)

In this section, Belford posed the following questions:

- How are subfields $d$, $p$, and $s$0 indexed, displayed, or labeled? Does information in $s$3 display?
- How is related coded information (033) used?

In WorldCat Discovery, Subfields $s$0a, $s$0d, $s$0, $s$p, and $s$3 are displayed with the label "Event Notes." 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 ($a$1) and title index ($a$3)? Is information in $s$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 $a$1) and title (subfield $a$3) subfields in the enhanced 505 field are indexed in the name and title indexes, respectively. 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.” 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 $s$a.

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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 browsers 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. 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. 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. Sharps and flats 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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24 "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%3FTo cPath%3DIndexes%7C55.

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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.²⁶

Recommendations

Our recommendations for improvement of WorldCat Discovery are based 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

²⁶ 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://wmun.on.worldcat.org/advancesearch). 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_Surveys/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.”
- Display subfield S1 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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Five Librarians Selected as 2017 IFLA/OCLC Fellows

OCLC, along with the International Federation of Library Associations and Institutions (IFLA), has named five librarians selected to participate in the Jay Jordan IFLA/OCLC Early Career Development Fellowship Program (http://www.oclc.org/en-US/about/awards.html) for 2017. The program supports library and information science professionals from countries with developing economies. The 2017 IFLA/OCLC Fellows were announced at a news conference during the World Library and Information Congress: 82nd IFLA General Conference and Assembly in Columbus, Ohio, USA.

The 2017 Fellows are:

- Patience Ngizi-Hara, The Copperbelt University, Zambia
- Eric Nelson Haumba, YMCA Comprehensive Institute, Uganda
- Sharisse Rae Lim, National Library of the Philippines
- Jerry Mathema, Masiyephambili College, Zimbabwe
- Nguyen Van Kep, Hanoi University, Vietnam

The IFLA/OCLC Fellowship Program provides advanced continuing education and exposure to a broad range of issues in information technologies, library operations, and global cooperative librarianship. With the selection of the five Fellows for the class of 2017, the program will have welcomed 85 librarians and information science professionals from 38 countries. The selection committee for the 2017 Fellowship program included: Fiona Bradley, IFLA; Sarah Kaddu, National Library of Uganda; Nancy Lensenmayer, OCLC; and Susanne Riedel, Universitätsbibliothek Bielefeld, Germany.

OCLC MARC Update 2016

The OCLC-MARC Bibliographic and Holdings Format Update 2016 will be installed during August 2016. All details are now available in OCLC Technical Bulletin 266: OCLC-MARC Format Update 2016 available at https://www.oclc.org/support/services/worldcat/documentation/tb/266.en.html. This update will implement MARC 21 Bibliographic and Holdings format changes announced in MARC 21 Updates No. 21 (September 2015; http://www.loc.gov/marc/marc21_update21_online.html) and No. 22 (April 2016; http://www.loc.gov/marc/marc21_update22_online.html) including:

- Defining three new codes in existing positions in the Sound Recording 007 (“Remote” in Specific Material Designation, “Not Applicable” in Speed and in Kind of Material) and one new code in an existing position in the Electronic Resources 007 (“Standalone Device” in Specific Material Designation).

- Defining subfields $0 (Authority Record Control Number or Standard Number) in existing 336 (Content Type; Bibliographic and Authority), 337 (Media Type; Bibliographic and Holdings), and 338 (Carrier Type; Bibliographic and Holdings) fields.

- Defining new Bibliographic and Authority fields 348 for Format of Notated Music.

- Defining new subfields Sr (Total Number of Individuals Performing alongside Ensembles) and St (Total Number of Ensembles) in existing Bibliographic and Authority fields 382 (Medium of Performance).

- Defining subfield $w (Bibliographic Record Control Number) in existing Authority field 670 (Source Data Found).

- Defining new subfields $0 (Authority Record Control Number or Standard Number) and $2 (Source of Term) to existing Bibliographic field 753 (System Details Access to Computer Files).

- Defining subfield $8 (Field Link and Sequence Number) in over 150 Bibliographic fields where it has been defined by MARC 21.

Additionally, OCLC will validate MARC codes announced in nine LC Technical Notices (http://www.loc.gov/marc/marcglnf.html#naa) issued since the OCLC-MARC Update 2015 was installed in August 2015. OCLC also plans to convert all existing Bibliographic fields 305 (Physical Description for Sound Recordings) to field 300 and make field 305 obsolete. Although MARC 21 Authority Format changes are documented in Technical Bulletin 266, the Authority record changes will be implemented not at this time but instead at a future date in coordination with the Library of Congress and the Name Authority Cooperative (NACO) of the Program for Cooperative Cataloging (PCC). LC, NACO, and OCLC will make announcements at that future date. OCLC plans to install the OCLC-MARC Bibliographic and Holdings Format Update 2016 during August 2016 and will make announcements widely through the usual discussion lists and Connexion logon greetings at that time.
**Faceted Controlled Vocabularies: Join Our New Discussion List**

OCLC Research is pleased to announce the debut of a new electronic discussion list hosted by OCLC. FACETVOC-L (Faceted Controlled Vocabularies discussion list) is a discussion list focused on faceted controlled vocabularies used in libraries, archives, and museums. This includes vocabularies such as FAST (Faceted Application of Subject Terminology), AAT (Art and Architecture Thesaurus), and LCGFT (Library of Congress Genre/Form Terms). The list will be a point of focus for discussion and exchange among librarians, archivists, museum professionals, controlled vocabulary specialists, and other professionals engaged in the creation, maintenance, study, and—especially—the application of faceted vocabularies in a variety of contexts including as part of cataloging and metadata editing work and/or deployment in information retrieval and discovery systems. The FAST (Faceted Application of Subject Terminology) team at OCLC will monitor and participate in the list. OCLC extends a special invitation to other agencies responsible for publishing faceted vocabularies to join FACETVOC-L discussions. To subscribe to FACETVOC-L, go to http://listserv.oclc.org/archives/facetvoc-l.html and click on the “join or leave the list (or change settings)” link. Once your subscription request has been approved, you will receive a welcome message. To send messages to FACETVOC-L, go to http://listserv.oclc.org/archives/facetvoc-l.html and click on the “post to the list” link, or email the post to: facetvoc-l@oclc.org. (Note: You must be a subscriber to post to the list). To search the FACETVOC-L list archives (available to subscribers only), go to http://listserv.oclc.org/archives/facetvoc-l.html and click on the “search the archives” link. OCLC Research extends a special thanks to the ALCTS CaMMS Faceted Subject Access Interest Group (a unit of the Association of Library Collections and Technical Services, a division of the American Library Association) for encouraging OCLC to establish FACETVOC-L.

**Addressing the Challenges with Organizational Identifiers and ISNI**

Organizational affiliations of the creators of works are important to a variety of stakeholders, including academic administrators, funders, publishers, repository managers, software developers, rights agencies, and individual researchers. Identifying and tracking these affiliations can be challenging, as organizations may be known by a variety of names and may have schools or research centers well-known on their own. An organizational identifier—a unique, persistent, and public URI associated with the organization that is resolvable globally over networks via specific protocols—provides the means to both find and identify an organization accurately and to define the relationships among its sub-units and with other organizations. *Addressing the Challenges with Organizational Identifiers and ISNI*, by Karen Smith-Yoshimura, Janifer Gatenby, Grace Agnew, Christopher Brown, Kate Byrne, Matt Carruthers, Peter Fletcher, Stephen Hearn, Xiaoli Li, Marina Muilwijk, Chew Chiat Naun, John Riemer, Roderick Sadler, Jing Wang, Glen Wiley, and Kayla Willey (http://www.oclc.org/content/dam/research/publications/2016/oclcresearch-organizational-identifiers-and-isni-2016.pdf), presents new modeling of organizations that others can adapt for their own uses. This report focuses on organizational identifiers from the perspective of academic institutions. Their ranks and reputation often determine their success in obtaining funding and attracting or retaining faculty. Identifiers provide the “glue” for institutions and funder systems to support comparing and ranking the outputs of the research process; assessing the impact of grants between institutions and their funders; and tracking and collating publications between researchers and their publishers. The report outlines a number of scenarios where the International Standard Name Identifier (ISNI) can be used to disambiguate organizations, including real-world examples.
Sharable Local Name Authorities: OCLC Research Participates in IMLS Grant

OCLC Research will partner with grant recipient Cornell University Library and several other organizations to hold a national forum on issues concerning local authorities in library metadata. Under the lead of Chew Chiat Naun of Cornell, the forum has the objective to seek a common understanding among various stakeholders of the problems inherent in sharing authorities. Stakeholders include the LAM community, vendors of integrated library systems (ILS) and research information management services, authority vendors, content providers, academic administrators, and the communities they serve.

This work is being funded by a $98,484 grant from the Institute of Museum and Library Services (IMLS). From the grant proposal: "By facilitating a national forum, we plan to identify solutions for facilitating the creation of more shareable authorities. This is a critical area in which a highly collaborative effort can promote interoperable metadata and linked data readiness. [...] Linked data offers the promise of unified discovery of knowledge relating to persons and organizations in place of the current fragmented user experience. [...] The goals of the forum are firstly to develop this shared understanding and document it in the form of a reference model and associated white paper, and secondly to identify and characterize a set of larger objectives around which interested stakeholders can convene to plan further action." The potential impact of addressing issues related to sharing local authorities includes aiding cross-platform discovery and supporting research information management, such as tracking scholarly output.

The full list of institutions participating in this grant includes: Cornell University Library, the Library of Congress, OCLC, the Program for Cooperative Cataloging, the ORCID organization, the Coalition for Networked Information, the Social Networks and Archival Context Cooperative, the BIBFLOW project, Stanford University Library, and Harvard Library. More information about the grant award is available from the IMLS website at https://www.imls.gov/grants/awarded/LG-73-16-0040-16.

BAnQ Adds 2.4 Million Bibliographic Records to WorldCat

Bibliothèque et Archives nationales du Québec (BAnQ) has contributed 2.4 million records to WorldCat, the world's most comprehensive network of data about library collections. The contribution, which includes 800,000 new records, will make BAnQ's valuable collections more visible and accessible to researchers around the world. Bibliothèque et Archives nationales du Québec, which is at once national library, national archives, and central library of a major metropolitan city, brings together, preserves, and promotes materials from or related to Québec.

As a cultural hub, BAnQ strives to expand access to knowledge in 12 facilities open to the public across Québec: the Grande Bibliothèque, a preservation facility, and 10 archives facilities. Located in the heart of Montréal, the Grande Bibliothèque offers open and free access to its heritage collections' materials and to its universal circulating collection. Over 5 million items circulate from this unique collection in French and other languages, which includes books, CDs, DVDs, and e-books.
Questions and Answers

Jay Weitz, OCLC

Cataloging Editions Defensively

Question: We know that the "Library edition" of an audiobook usually means a sturdier packaging and more expensive price. The content and format are usually exactly the same as a regular edition. So I would not input a new record. How about a “retail edition” of an audiobook? Is that another word for “regular edition”? An OCLC record example is #937859791. Any correction or advice would be appreciated.

Answer: Resources designated as “Library Edition” may have content or other differences from resources not so designated. But as you suggest, often the differences are in physical presentation, which may or may not be obvious from other elements in the record. Both OCLC’s “When to Input a New Record” (http://www.oclc.org/bibformats/en/input.html#CHDJFJHA) and ALCTS’ “Differences Between, Changes Within” (http://www.ala.org/alcts/sites/ala.org.alcts/files/content/resources/org/cat/differences07.pdf) regard “Library edition” as a legitimate edition statement. Library editions so designated should be identified as such in field 250. The same goes for “Retail edition.” As I understand things, retail editions are usually juxtaposed to “rental editions” of resources such as DVDs, with the rental editions often lacking certain extra features that are found in the regular or “retail” edition. If such designations as “Retail edition” or “Rental edition” appear on a resource, it should definitely be included as a legitimate edition statement in field 250. These sorts of edition statements in 250 fields distinguish for both users and catalogers potentially distinct versions of what may be similar resources with differences that may not otherwise be obvious. Such edition statements also assist OCLC’s Duplicate Detection and Resolution (DDR) software in treating records for similar but distinct resources correctly by not merging records that should be kept separate. You may want to take a look at one or more of our “Cataloging Defensively” presentations, which deal with some of these issues. They may be found on OCLC’s “Cataloging Defensively” page at http://www.oclc.org/events/cataloging-defensively.en.html. There is a general presentation from 2010 and 2016 versions specifically for maps, sound recordings, and videorecordings, and will be more for other sorts of materials in the future.

Not-So-Special K

Question: I am confused by the apparent elimination, in Connexion, of the data element “k” for FMus. When I look at the OCLC Input Standards, “k” appears in the explanations (and seemed to be the best choice, based on the title I am trying to catalog), but it is missing in the FMus drop-down menu.

Answer: The FMus (Score 008/20) code “k” was implemented as part of the OCLC-MARC Update 2013. Making changes to dropdowns in the Connexion client would have required a new version of the client software, but there has not been a new version in several years. You can input the value “k” manually, without using the dropdown.
Question: This has been asked and answered many times before, but I can't for the life of me remember what was decided. We have some CDs in two forms. The discs look identical except that one says "mfg for BMG" and has a number (D 116213) right next to that statement, so I presume that number is assigned by BMG. The other lacks that statement and that number. Should these two be considered copies or separate manifestations? We have three discs in front of us right now with exactly this issue. No difference at all except the BMG stuff.

Answer: Your question sounded really familiar to me, as well, but it took me a while to find at least one of its earlier iterations. It appears in the MOUG Newsletter No. 87-88 (September-December 2004) page 15 (http://musicoclcusers.org/wp-content/uploads/87SepDec2004.pdf). Here is the original Q&A:

Question: This is a question I've had for a while. We periodically receive as gifts from individuals CDs that were bought through one of the CD clubs, e.g., BMG. These all have a separate manufacturer's numbers from the regular commercial issues, although sometimes the original manufacturer's number is given as well. I have always thought that they should be entered as new records in OCLC, according to the guidelines "When to Input a New Record," since for the 028 field it says "Specific differences in numbering ... justify a new record." I always add two 028s, one for the original and one for the club version. I also add distributor information in the 260. I noticed recently that one like this I input had been merged, and I want to make sure I'm correct in my interpretation. I did notice that the notes under 260 might argue against doing this, since it says for name of publisher not to input a new record "as long one on the item matches one on the record ...." Thanks for any clarification you can give on this.

Answer: In cases where the club's number is different from, and entirely replaces, the original manufacturer's number, there is no doubt that a new record would be justified. When both the club's number and the original manufacturer's number appear, the situation is more ambiguous and will usually require individual judgment. If the added club number is the only difference, you might lean toward simply editing an existing record for local use. When there are other differences as well, such as differences in dates or a club (or other) edition statement, you might lean toward a new record. In cases where there is an explicit statement about a "previous" or other release under a different music publisher's number, take that as evidence that a new record is justified. When only the original music publisher's number appears and the only difference is a club edition statement, I think we can invoke the "book club edition" analogy and consider that not to justify a new record. That should give you at least a little guidance.

This response still sounds pretty reasonable to me. As you describe your cases, with the “mfg for BMG” note and accompanying number the only differences, my suggestion would be to treat them as copies, not as separate manifestations. You may or may not want to note the “mfg for BMG” and number locally, but that would be up to you.
Questions & Answers

006 Field and Stream

**Question:** I am improving a vendor record for a Miles Davis score which includes a code allowing access to online audio backing tracks at the Hal Leonard website. Users can manipulate speed, pitch, balance, and loop the recordings, using Playback+, or they can download mp3 files of the recordings. I have concluded that the appropriate 33X fields for the audio files should be:

- 336 performed music $b prm $2 rdacontent
- 337 computer $b c $2 rdamedia
- 338 online resource $b cr $2 rdacarrier

But I am a little shaky as to whether I should code the 006 for a sound recording or a computer file. Though the MLA best practices don't seem to address 006 that much, they do indicate that items that are primarily streaming audio should be coded as sound recordings rather than electronic resources. Advice?

**Answer:** Field 006 is repeatable, so you may include one for the sound recording aspect (006/00 Type “j”) and one for the electronic resource aspect (006/00Type “m”). A musical streaming audio file cataloged on its own would be coded primarily as a sound recording (Leader/06 Type “j”) and would include field 006 for the electronic aspects (006/00 Type “m”). In addition to the MLA Best Practices document, you should be aware of the Online Audiovisual Catalogers (OLAC) document “Best Practices for Cataloging Streaming Media Using RDA and MARC21” available freely on the OLAC Web site at http://olacinc.org/sites/capc_files/Streaming_Media_RDA.pdf.

® We Transcribing Trademark Symbols or ® We Not?

**Question:** How do I add the registered trademark symbol after the word LEGO in a book title?

**Answer:** Under either AACR2 or RDA, the registered trademark symbol would be omitted. Here is the relevant portion of RDA LC-PCC Policy Statement 1.7.5: “Exception 2: Ignore symbols indicating trademark (registered or otherwise), patent, etc. These include a superscript or subscript "R" enclosed in a circle (®) (ignore although included in the character set) and the superscript or subscript letters "TM" (™). Explain their presence in a note if considered important. Ignore such symbols also when they appear with elements used in access points.” More-or-less the same text appears as part of AACR2 LCRI 1.0E. The earlier rule interpretation included the omission of the “©” copyright symbol; under RDA practice, it would now be included in copyright statements. The LCRI also explicitly said not to explain the presence of these symbols in a note, contrary to the option in the RDA PS.
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