Welcome to C&I 181. This issue has a number of articles from cataloguers and metadata specialists who work in the library supply or bibliographic vendor sector. We have articles representing Dawson books, ProQuest Coutts, Bibliographic Data Services, Special Libraries Cataloguing and Backstage libraries. Household names to the readers of C&I, and so, it is interesting and helpful to find out more about how their workflows are organised and what technology they use. It is also nice to have some photos of the staff and office environment. Janet Aucock and Elizabeth Cuthill from the University of St Andrews have provided an interesting article which describes how they provide MARC21 records for two commercial partners. The benefits of sharing metadata are considerable and so it is really good to hear about such initiatives. Finally, Amy Staniforth, provides an account of the JSC RDA steering committee held in November in Edinburgh, which she attended as CIG sponsored observer.

The theme for 181 was suggested to us by a CIG member. If you have a suggestion for a C&I theme, please do get in touch with the editors.

For 2016 C&I will focus on the following topics:

March: Metadata team workflows
June: RDA in cataloguing rare materials
September: Current research
December: CIG conference papers

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During my study of an MA in History the subjects of Palaeography and Archival Sciences appeared. I had never previously considered the creativity and imagination needed to understand old documents; Palaeography fascinated me. And when related to Archival Science, for example studying the history of an old institution, I was in my element. It was this subject matter that led me to undertake a Library and Information Science degree in 2009. During this time I also worked as a part-time trainee within the Historical Archives at the University of Barcelona and as a volunteer at the Central Public Library of Thessaloniki (Greece).

After my studies, while in Greece, I received a call from the Director of the Rare Collection Library with a request to run a project, retrospectively cataloguing books from the 17th Century – and so my cataloguing career was born. Following completion of the 17th Century (not literally) I was called to catalogue books in the School of Medicine, which I did, but my experience in Greece had given me a thirst to work in other European countries, which I needed to quench.

I sorted out a traineeship at the European University Institute (EUI) in Florence; an international research institute with an amazing library and multilingual, multi-cultural library staff. It wasn’t unusual to have a single conversation in a mix of Italian, French, English and Spanish. During my time there I was involved in some training which anticipated RDA standards. The traineeship all too soon came to its timed end, but whilst I was still in Florence I received another call regarding a temporary position at the NATO Defence College in Rome. I took the position of main cataloguer for 11 months, predominantly cataloguing publication articles rather than books, as well as taking charge of authority files and subject headings. This was a good learning experience; my colleagues had little training in Library Services so the role required a lot of research to ensure we implemented good standards.

On finishing the contract with the NATO Defence College I returned to Greece where I took another position as a records manager in CEDEFOP, the European Centre for the Development of Vocational Training. The main responsibilities of this role were within the digital and physical archives of the institution, but I continued with some cataloguing tasks too in order to maintain the skills I had already learnt.

When this contract ended I headed to the UK in search of work and found Dawson Books in Norwich; an internationally recognised supplier of academic print and eBooks, offering tailored supply solutions for academic institutions around the world. Dawson Books had a vibrant and established team made up of dedicated multi-lingual cataloguers with a wealth of relevant qualifications and experience. The organisation produced the best quality records for all Library customers in AACR2 or RDA format, applying necessary LC, DCC or NLM subject classifications using online services and toolkits.

Whilst this was my first experience as a librarian in the private sector and the rhythms and systems were different to those I had worked with in Southern Europe, I had ensured throughout my contractual roles I kept in-touch with new developments and understood the future of cataloguing, so I found it easy to adapt my working style.
I have now been with Dawson Books for over two years. Alongside the up-to-date systems the organisation also runs an in-house designed Web App and MARC EDIT to produce MARC21 records book in hand and have automated processes which upload completed records into the main processing system in real time. This means we have catalogued MARC records continually becoming available for customer supply on demand for both print books and eBooks.

The day to day job sees customer orders flow into the business and, through existing parameters, cataloguing requests are produced for us to review and complete. We monitor workflow closely to ensure we have no backlogs and the books are picked from stock locations in our warehouse and delivered to us daily, so we can catalogue book in hand. The books are returned the next day once completed and reallocated, so they quickly become available for sale. Within a day each individual cataloguer will catalogue anywhere between 25 and 30 books, depending on complexity and we all have our own specialities. You’ll frequently find my desk piled with history books.

Our IT development team have recently completed an in-depth overhaul of our digital systems and the company have invested heavily on continuation of this; speed and coverage of supply of digital material and content is a core focus. We are also continually reviewing and enhancing all our trade systems to ensure the best delivery of digital and bibliographic metadata, ordering processes and delivery.

We have two core systems; Dawsonenter and Dawsonera. Dawsonenter is our custom built acquisition portal with over 35 million titles available. Through Dawsonenter, customers are alerted to any special offers and promotions on titles, which we work with our publishing partners to bring to them at key times throughout the year. Using this service, customers are also able to access our eBook title details and offers on Dawsonera. This eBook platform allows customers to purchase eBooks or set up eBook rentals to further enhance the learning environment at their institution. There are plans to continue to develop both systems to ensure we are supporting our customer needs and requirements. We listen to customer’s feedback and try to accommodate requests; refining our systems to individual customers where necessary. We have a customer support team who make sure local standards are locked into ordering criteria. And we inform all customers when any changes are on their way.

As for me, I have now taken on a new role within the organisation of Cataloguing Team Leader and a year ago I decided to continue my studies whilst working, enrolling on a Library Management course at the Open University of Catalonia. I will complete the course at the end of July 2016, but so far I have found specific areas covered, such as leadership and management within information and knowledge centres, hugely applicable to my current job role.
The future of cataloguing is changing and I believe moving forward it will be linked more inherently to the World Wide Web. The new metadata system, BIBFRAME, will be fully searchable and retrieved by online searching machines, such as Google, or the discovery tools in libraries. It won’t only retrieve documents already known (where we know the author, title or subject), but it will allow you to discover new works located in libraries or research centres across the world.

Currently cataloguing is quite complicated and an expensive service for most libraries, but I am sure the new metadata will be much simpler and cheaper to maintain. Libraries will change, the question is simply when the change will occur. Our systems have continually been enhanced to meet new demands from the library industry such as changing to RDA standards – and we are already creating ideas on how to incorporate the new subject classifications in THEMA and the new structure of BIBFRAME into our processes and we will continue to develop and push the industry forward.

Whilst there are a lot of challenges, there is a lot to look forward to and I believe at Dawson Books we have the systems, processes and experienced team to meet new demands.
Cataloguing at ProQuest Coutts

Duncan Chalmers, Cataloguing Co-ordinator, ProQuest Coutts Information Services

From our site on the edge of the New Forest, ProQuest Coutts supplies print books, e-books and a/v materials, as well as shelf-ready and collection development services to libraries both in the UK and around the world.

Every book we handle can be tracked on our system. Flags are placed such that books go on a journey through our departments, at each stage receiving the appropriate type of processing as per customer requirements – for example dust jacketing, attaching RFID tags, etc. For me, this means I can regularly run reports to check how long books have been at various stages, and to make sure that everything which is sent through the cataloguing team is flowing smoothly through. Items will be flagged as needing to go through the Cataloguing department if they require a MARC record and/or a shelf mark. There are eight of us in Cataloguing and together we’ve many years’ worth of experience at ProQuest Coutts (indeed one of us, Sarah, was integral to setting up the department in the very beginning), and can draw on all the knowledge our cataloguers’ mix of backgrounds affords us. All cataloguers new to ProQuest Coutts go through a training period. It’s unusual for us to find anyone who starts the job with the level of cataloguing experience we need, so this training period can be quite intense. The benefits of doing this really show when you have, as we now do, a team where everyone can bring their own knowledge and views to a firmly established core of standards and practices.

With libraries requiring different customisations for the classification schemes in use, and with location and size codes differing across sites, no two customer requirements are ever the same. We’ve found an effective way to ensure quality and consistency is for each customer to have a cataloguer dedicated to them, with one or more designated back-ups. As it were, mirroring how we would classify those books were we physically present at the library we’re serving. This makes us generalists for the most part, though with more specialist areas there’s room to concentrate our expertise. It’s Claire and I who have copies of Moys on our desks; while Catherine and Claire are our musicians and have recently been working to improve the way we treat music scores, which is something we’re hoping to see more of. Anita takes care of a lot of art materials and (uniquely, in my experience) Kristina actively wants to catalogue the big medical books with unpleasant plates in them!

On classification schemes, Dewey and LCC are the most common, and so in addition to using them for shelf marks we always use both of these in any MARC record we produce. Moys and NLM classifications are also requested in some instances. It’s a similar picture for subject headings, with all records being given LCSH and more occasional use of MeSH and Sears.
While shelf marks are unique to the library they're created for, MARC records are done to a standard full-level template (with, as mentioned above, occasional extra inclusion of MeSH or Sears). This template aims to hit everything any library might want and where it provides anything extra that they don't, it's a simple matter to strip out fields or subfields on sending the record. As well as records we've created, our system has records from our ProQuest Coutts colleagues in North America and records we receive in feeds from the Library of Congress, the National Library of Medicine and from Bibliographic Data Services. We're also able to pull in records from OCLC. Where a record from one or more of these sources matches a book, a record can be sent out to the customer as is, with whichever source the customer prefers taking precedence. Where none of these sources meets the customer's requirements (usually because they are pre-publication records) we will, book-in-hand, upgrade the best record to our full-level standard. Where no record is available we will create an original one.

The team work away on records for much of the day, and it's vital to us that the quality and consistency of these records is maintained, while also ensuring that the items they describe are ready to sit on their library's shelves as quickly as possible. To this end, I'll look over ten books from each cataloguer a month (meanwhile, Anita will look over mine) and feed back where necessary. It's a constant wrestling with Shera's laws. Records to be quality checked are selected approximately at random, though I'll also make sure the sample represents a balance of Original/Upgraded records, Books/DVDs, RDA/AACR2, etc. that accurately reflects the work we're doing. We also have a weekly team meeting where we can discuss things of general import, for example any recent changes to RDA or MARC and developments in BIBFRAME. (Planning for the Christmas lunch starts in October!) I'm in a great position to see from these two methods – individual quality control and feedback, and team meetings – just how committed each individual is to doing the best job they can, and just what an inspiring, collegiate atmosphere we've got.

We were early adopters of RDA and since that somewhat unfortunate April 1st switchover date all original cataloguing has been done to that standard. Copy cataloguing will be in the content standard of the best quality record we can source. Recently, we've been able to meet customer demands to increase our output of DVDs and music scores. On occasion we will work with individual libraries on metadata projects that aren't tied to providing books (reclassification, record conversion) – going forward, this would be an interesting area in which to work with more partner libraries. As cataloguers, it's vital we keep the patron in mind (“Save the time of the user”) and feedback from libraries on how we’re doing, and what else we could be doing, is always welcome.

FRBR and RDA have advanced the discourse as far as considering elements and levels of bibliographic description are concerned; perhaps as the focus changes to how bibliographic data is processed and displayed, these subtle differences in cataloguing standards will show their worth. RDA has always felt top-down, in Raymond’s dichotomy, a Cathedral (RDA-in-MARC, a somewhat leaky one). Bibliographic description in a Linked Data environment has the potential to be bottom-up, a Bazaar.
With the concrete of BIBFRAME still to set, we’re interested in exploring how libraries can find Linked Data solutions to the challenges they face, and how we can help them achieve this. The aim in cataloguing remains to provide the best data we can such that books (etc.) are discoverable and situated within a body of knowledge. For all that there’s going to be change, the standard no more provides quality metadata than your shiny new laptop writes your paper for you, so there’s still plenty of work out there for cataloguers to do. At ProQuest Coutts we work to add value to content, as I believe any librarian does. With a growing number of people experimenting with how a Linked Data environment, BIBFRAME or otherwise, can achieve this, I feel it’s an exciting time to be a cataloguer.

These are three of the career paths cataloguers have taken before joining us:

“This is my first job since finishing library school and my first dedicated cataloguing role, having previously worked more generally in a number of other libraries. I went into the MSc without a focus on any specific sector but pursued cataloguing having particularly enjoyed the Information Retrieval module of my MSc and writing my dissertation in this area. Working at ProQuest Coutts is a great opportunity to enhance my knowledge and skills.”
Catherine Smith

“As work experience for my masters in Information and Library Studies, I chose to go to the Sackler Library in Oxford. This turned into a part-time job as a Library Assistant in Reader Services. I stayed there for three years, progressing to part-time Acquisitions and Cataloguing Senior Library Assistant. While doing this, and part-time work in other Bodleian Libraries, I decided I wanted a full-time job in cataloguing. ProQuest Coutts has been a great place to further my skills, and cataloguing for various academic libraries, covering a wide variety of subjects, is very interesting.”
Vanessa Conjar

“After a Postgraduate Diploma in Librarianship & Information Studies at Robert Gordon's, I built up 15 years’ experience in different roles in medical, environmental and workplace libraries, doing a bit of everything in various roles. I had always enjoyed cataloguing, so I was delighted to be able to do this full-time at ProQuest Coutts, where I have hugely expanded my knowledge and experience as a cataloguer. Though very different from the public sector roles I have had in the past, I relish the challenges of working in a commercial environment.”
Richard Daly

Contact Duncan at Duncan.Chalmers@ProQuest.com to learn more about ProQuest Coutts or to arrange a tour of their Ringwood facility.
My first job after library school was as a trainee Cataloguer in the bibliographic department of a library supplier. Once trained, I had to catalogue new books to a very tight schedule, using the standards of the time which were AACR2, UKMARC, Dewey edition 20 and LSCH. My next job was Operations Manager of the newly-established business Bibliographic Data Services Limited (BDS). I was still a cataloguer, but now I also had to make sure the team met the deadlines, and organise the workflow.

Fast forward 20 years, and I still work for BDS, and I’m still a cataloguer. Except now the standards are RDA, MARC21, Dewey edition 23, LCSH and LCC. In the intervening years, I have had responsibility for figuring out what the implications of the new standards are for our working practices, worked with programmers to find ways to support the changes, and written and delivered training courses.

A significant issue when cataloguing for an agency, is that the bibliographic records we create are to be used by many different organisations, who might have very different needs and often use different standards. This means several things for our work as cataloguers:

- BDS records will appear in many different catalogues
- BDS do some extra work to support customers, beyond the normal standards, such as assigning fiction genres
- BDS data gets translated (inhouse) into other formats, e.g. UKMARC, so the company has to support lots of different standards
- BDS data gets customised for many customers, who want some pieces of information but not others, and different presentations of information
- When we make changes to our ‘standard record’, due to developing standards or in-house policy, we have to be aware of the implications for customers, and for our in-house programs which customise data
- Once we’ve despatched data, we have no control over what happens to it

Our commercial environment means that productivity is extremely important, and our workflows have been honed over the years to maximise throughput, and minimise delays and/or errors.

The process begins with data which we receive from publishers about their forthcoming publications, and this data is mostly now in the form of an electronic feed. The publishers’ standard is ONIX, but we find that every publisher requires a separate import program. Once this data is pulled into BDS, it is organised into priorities according to publication date and the priority level of the publication.

The Operations team is split into cataloguers and data entry staff. Cataloguers are usually first to ‘touch’ the record, and their responsibility is to assign Dewey Classification, Library of Congress Classification and Library of Congress Subject Headings, as well as deciding what the audience codes are, and doing name authority checking. Bearing in mind that all of this has to be done on the basis of the publishers’ information, it can be either be a blessing or a curse when there is often very little other than the title to decide what the resource is about!
Data entry staff then have responsibility for transcribing title information, including series titles, recording physical details, making any necessary notes and creating a short summary of the publication's subject, and likely interest to readers.

The pre-publication record should now be complete, and ready for external data feeds. Customers usually receive daily or weekly feeds, sending all new and changed records to them, according to their specification.

We also have a confirmed, book-in-hand, level of cataloguing service. For those books we receive physical copies of, they are logged in to the workflow, and then put on trolleys. Data entry staff get them first this time, to confirm title information, and the other descriptive details such as pagination. The records are then printed off for checking against the resource by cataloguers, who not only have to check the verified data for typographical errors, and the descriptive cataloguing, but also the subject analysis. New headings may be available since the prepublication record was created, but more importantly the description given in the publisher information needs to be checked against reality.

Another, developing, strand in the workflow is how we deal with confirmed resources which are not physically available - electronic, or digital, publications. We have several publishers using our services to obtain library standard MARC records for their products, and in the academic domain this trend is obviously well entrenched already. Information for these titles is usually sent to us in the form of a spreadsheet, which we then use to identify print resources we can base records on, if available. More and more of these publications are born digital, though, and the Cataloguing in Publication (CIP) programme at the British Library now includes e-resources, too. This is a part of the business that is effecting changes to workflow, as we now accommodate a greater percentage of digital publications.
When there’s a change to standards, whether it’s a development to MARC21, or a significant move such as from AACR2 to RDA, we have to decide, just as any organisation does, what to do about it. It is part of my role to anticipate and plan for such developments, and I use listservs and attend conferences and seminars in order to do so. I also sit on committees such as the British Library and CILIP RDA Committee, and the BIC Library Metadata Group, with a view to not only being aware of developments but contributing a practical cataloguing viewpoint to the shaping of developments.

So, being a cataloguer in a commercial organisation is comparable to being a cataloguer in a library, with the proviso that we have to keep up-to-date at all times, because our customers are relying on us to provide the information they require at the right time. In some cases, we act as advisors to libraries who need guidance on what to do in relation to developments in the field. Just as cataloguers in libraries are focused on creating records to meet the requirements of their users, we too are very customer-focused, but we have the additional satisfaction, and pressure, of knowing that the fruits of our labour go out to libraries all over the English-speaking world.

If cataloguing is your metier, that’s a really powerful incentive to be at the top of your game.
Background

Since its founding in 1979, for whom work is done by Special Libraries Cataloguing, Inc. (SLC) has changed dramatically. Today, individual libraries comprise a small portion of SLC's work. Most work is preparing Machine Readable Catalogue (MARC) records for electronic publisher and electronic aggregator vendors, plus indexing online journals.

Procedure

Electronic publishers and aggregators submit a spreadsheet containing among other things the International Standard Book Number (ISBN) for the print version of the resource (if one), plus Uniform Resource Location (URL coded 856$u) and any other standard numbers associated with the item, e.g., e-ISBN (coded 020$a), or Digital Object Identifier (DOI coded 024 7 $a$2doi).

Those print ISBNs are searched via Z39.50 using an automated program. If a MARC record for the print item is found, a record for the electronic version is created automatically, with no cataloguer intervention. If the record lacks any subject analysis wanted by the vendor client, class number or subject heading system, the record is referred to a cataloguer.

If a print record is not found, a cataloguer is given access to an online Portable Document Format (PDF) version of the resource, and an original record is prepared. That record is sent for review by a quality control librarian, and then to the automation (IT) librarian for manipulation and export for the client and in some cases OCLC upload.

It is SLC practice to record original publisher in MARC21 field 264 1, and if for an aggregator, that distributor in 264 2. The Provider Neutral (PN) standard observed by OCLC sometimes results in the loss of data we have entered, even if the various versions of the e-book available are different manifestations. Credo for example removes page numbers and indexes, adding audio and video files.

The PN standard prefers MARC field 776 for other formats as opposed to field 020$z and 530 for the print version. SLC includes the print ISBN in 020$z, since more library systems index it than 776’s $z. The 020 $z subfield is for incorrect ISBN. New 020 subfields are needed for alternate physical form of the work, and for parts of a work, e.g., a volume of a set with ISBNs for the set and individual volumes, and individual issues of a yearbook, with an ISBN for each volume and an International Standard Serial Number (ISSN 022) for the continuing resource.

Due to the international client base of our clients, it is SLC practice to give bracketed jurisdiction in imprint, if not on the item as now allowed by RDA. A city known in one country may not be known in another.

For clients who will accept it, SLC prefers the ISBD media term "electronic" to RDA's "computer". (The $2isbdmedia code is now accepted by OCLC.) Today most remote electronic resources are read using electronic reading deivces. We also prefer the shorter ISBD content (336) terms, e.g., "image (moving)" rather than "two-dimensional moving image", but have not implemented them. We would like RDA carrier term "kit".

SLC has refused to accept requests to do subject analysis of records with substandard description prepared by vendors. Many vendors prefer to use less expensive services which do not use qualified cataloguers to produce records. If we charge $11.00 for a high quality record, just eleven sales of the resource would reduce the per use cost of that record to $1.00. That seems a worthwhile expenditure to us, based on the criticisms of vendor records we read on the cataloguer e-list Autocat.
Value of Contents and Summary Notes

A recent post on Autocat pointed out that the contents notes we prepare for Credo make those records useful, particularly in these days of keyword searching as opposed to consulted reference works, either print or electronic. An earlier meeting of Canadian Electronic Library clients (for whom we prepare records), noted that contents and summaries greatly increase the use of remote electronic resources.

Multilingualism and Internationalism

Some libraries have no single language of the catalogue. We catalogued for a United Nations agency whose catalogue was English/French/German. The norm in Korean academic libraries (when I taught there 1955-1969) was Korean/English catalogues. We are in correspondence with Lebanese National Library whose catalogue is Arabic/English/French. English language phrase inclusions are not always appropriate.

Subject analysis also has problems internationally. In the absence of RDA subject heading provisions, Library of Congress Subject Headings (LCSH) practice is the de facto standard, Canadians see the War of 1812 as a part of Canadian history, not United States history. Ms Fatima Albazzal of the Lebanese National Library reports objection to events which occurred in Constantinople being entered as Istanbul (651, 6XX$z). Sometimes indirect place subdivision can result in division through a jurisdiction which did not exist at the time of the events covered. Subject entry under latest form of place name does not always work well outside of North America.

Returning to description, it would seem far better if the Joint Steering Committee (JSC), responsible for RDA, would introduce the alternative practice of continuing ISBD inclusions in multilingual situations. That would seem more possible to achieve, than Michael Gorman's excellent suggestion that the ISBD inclusions be continued, and translated into those long phrases by the Integrated Library System (ILS) if desired.

In the meantime, in preparing vendor records, SLC attempts to avoid inclusions if at all possible. Internet searching will usually produce a guesstimate of place, producer, and year of a resource. The cataloguer's guess with resource on-screen would be superior to the patron's using an online public access catalogue (OPAC). If absolutely no data is available, SLC uses the ISBD inclusion. The AACR2 method of recording estimated century, decade, or year ([19--], [199-], [1999?]) was far simpler than the RDA method, as well as being language neutral. SLC continues that earlier practice.

Further Impacts of RDA

RDA changes, such as spelling out abbreviations, making entry under the first author given, removing "O.T." and "N.T." from between "Bible" and the name of a book of the Bible, etc., have had little impact.

The omission of qualifiers such as "(Fictitious character)" or species name from nonhuman "persons" entries moved from subject to name has produced major objections. It seems to us that such qualifications should be seen as much as for patron information as for producing distinct entries, as is the case with titles of nobility for example. The present inconsistency confuses patrons. The United Kingdom proposal for consistent application was rejected by JSC. We hope this will be reconsidered.

The expense of the RDA Toolkit for a score of locations, as well as its often fuzzy language and poor indexing, has resulted in the use of Michael/Mac Rule Interpretations (MRIs), AACR2 rule interpretations, written by Michael Gorman, (the AACR2 editor) and me, to allow the use of AACR2 to produce RDA compatible records.
To view the MRIs visit:

http://special-cataloguing.com/mris

You will see an access denied message, with directions to create a free account in order to log in.

On the site you will find a link to download a free RDA MARC record for the MRIs. There is a link at the top of each chapter to print an entire chapter, and links at the side to print individual rule interpretations, depending on whether you wish to file them in an AACR2 binder by chapter or by rule.

SLC appreciates reports of typos and needed changes or additions.

Due to client feedback, the MRIs instruct cataloguers to use subfield $e qualifiers after entries, but not subfield $i phrases before added entries. Clients find patrons do not understand "work, expression, manifestation" in those phrases. Instead, SLC justifies all added entries in the description, even if not required by RDA.

**Hope for the Future**

The probable advent of Bibframe as a replacement for MARC offers hope for solving some of MARC's problems. On the other hand, the replacement of MARC's language neutral number field tags with ambiguous English word labels may create the same problems for multilingual cataloguing as does RDA's English phrase replacement of ISBD inclusions.

We hope that the emergence of the European RDA Interest Group (EURIG) and its representation on JSC will result in RDA revisions making cataloguing in multilingual situations easier. Perhaps EURIG could urge JSC adoption for RDA the simpler and more intuitive ISBD media terms, which being shorter are easier for display to replace the AACR2 General Material Designation (GMD 245$h).

These changes would facilitate the creation of better vendor records for international use and exchange.

Special Libraries Cataloguing:  http://www.slc.bc.ca/
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Developing and maintaining an efficient workflow is important for vendors and is crucial in offering the best service possible for their clients. At Backstage Library Works, we review workflows on a project-by-project basis. It’s our desire to provide not only high-quality but also cost-effective solutions to our clients. Using a project management model, we have a few standard workflows that we begin with to adapt to the needs of an individual project. A few of these workflows will be illustrated below.

**Project Management Model**

Benjamin Franklin is attributed as having said, “If you fail to plan, you are planning to fail.”\(^1\) At Backstage, we feel that planning out projects and workflows is critical to project success. According to the Project Management Institute, a project goes through five processes: initiate, plan, execute, monitor and control, and close. The initiate and close processes are relatively short—these primarily consist of the decisions to begin and end the project. The planning phase should be where the most time is spent. Once the project is ready to go, it moves into execution, and then it is monitored and controlled throughout the execution to ensure it stays on scope, on budget and on schedule. Management areas within the project include considerations such as scope, time, cost, quality, human resources, communication, risk and procurement.\(^2\)

At Backstage, we follow these proven project management methodologies. All projects at Backstage follow this general workflow:

- **Pre-production:** This includes defining all the specifications of the project, compiling the project profile, and providing samples in order to confirm the deliverable meets the need of the client.
- **Production:** This is where we execute the project and monitor through our quality control processes. We often provide production samples to our clients throughout this phase.
- **Post-production:** This is where we run additional quality assurance processes, do any final data mapping and output the final deliverable files.

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For ongoing work or for projects with batch processing and deliveries, we adapt this workflow. We still begin with the pre-production phase and finalise the specifications and expectations for the project, but then it takes a circular route. The first batch moves into production, we perform quality assurance, in post-production we finalise the deliverables, and then deliver the output. The next batch is received and the process starts over into production.

We recognise that our role may be small compared to the view from our client’s desk, and our work might fit into a larger picture involving stakeholder approvals at the client institution, review of deliverables after ingestion into the library catalogue and final reports to stakeholders.

Reclassification Workflow

When planning out a reclassification project, there are different considerations and decisions to make when looking at the data aspect and the physical item aspect. When it comes to data reclassification, we utilise both automated and manual processes.

For a full data reclassification project, we start with our pre-production processing. This includes the assignment of a Backstage project manager, profiling and finalizing the specifications of the project and performing a sample on the data and returning it to the client to review. Once any final tweaks are made to the profile, we move into the production phase.

We begin with our automated production. We receive the client’s full database and prepare it for machine reclassification. Our machine processes search the Library of Congress, RLUK, and other desired databases for matching records with existing classification. If matching records with call numbers are found, the call number is merged into the record and all of the records matched are set aside for post-production processes. Records for which the machine was unable to find matches with call numbers are moved into the manual production phase. Our cataloguers manually search the same databases for matching records with call numbers. If found, the call number is entered into the record. If not found, our cataloguers use the subjects and other information within the MARC record to assign a call number using the appropriate classification schedules, be it LC, Dewey 23, UDC, etc.

Once all the records have call numbers assigned, the project moves into the post-production phase. The call number assignment undergoes quality assurance, the call numbers will be shelf listed and mapped to requested fields and holdings. We send a final sample to the client, and then upon acceptance of the sample, we finalise and deliver the full database.
Cataloguing Workflows

Cataloguing projects come in a variety of forms: backlog, gift collections, special languages without staff expertise, new acquisitions, and others. As with reclassification projects, we begin by assigning a project manager, who works with the client on the final specifications or profile for the project. A sample is returned and upon acceptance, the project moves into the production phase.

If provided with brief metadata of some format, we can utilise our automated processes to search for copy records. Brief metadata can be sent in the form of MARC records, Excel data, ONIX or other XML schemas, etc. If sent in non-MARC formats, we convert the metadata into MARC21. We use the metadata provided and search the Library of Congress and other requested databases for existing copy. If we find a matching record, it’s set aside for post-production processing. If the machine does not find a match, the title is manually searched in the databases for copy. If we find a match manually, the copy record is saved; if no copy record is found, we perform original cataloguing.

We often receive varying requests for how we handle copy cataloguing. We can accept copy records as they are or we can perform any level of editing, from just the addition of classification and/or subject headings, to a full review of the record to bring it up to full-level standards according to either AACR2 or RDA guidelines. Depending on the project specifications, we may do all copy searching before we perform original cataloguing or we may do both copy and original cataloguing simultaneously.

In the post-production phase, we perform quality assurance on the records, shelf list if desired, and perform any requested physical processing if working from the item in hand. We send a final sample to the client for review, and if accepted, the full file of records is delivered to the client along with the items.
For shelf ready projects, we have adapted our general cataloguing workflow to suit the involvement of book vendors. The book vendors ship items directly to our offices for cataloguing and shelf ready processing. When the items are processed, we incorporate vendor or acquisition data into 9XX or other fields for invoicing and overlay purposes. We then ship the items directly to the client.

Backstage has operated a cataloguing team onsite at several libraries whose collections could not leave the library. We assign or hire a project manager locally who works with the client to finalise specifications and prepares the collection for cataloguing staff. Cataloguers are recruited and interviewed, and acceptable candidates are reviewed with the library staff before positions are filled. When the project team is in place, the workstations are setup and made ready for production. Copy and original cataloguing are performed, alongside shelf listing and any physical processing. As completed, items are shelved and quality assurance performed on all aspects of production. Records are delivered and when all the cataloguing work is completed, the work stations are broken down and the project ends.
Other Considerations

We realise that one size does not fit all. As various changes in the library field take place, more and more unique solutions are required to solve a client’s need. Backstage strives to keep informed of these changes and to adapt to new demands from our clients. In recent years, many in the library community adopted RDA as the new cataloguing standard. Backstage began exploring the various facets of RDA in 2009 and Backstage cataloguers were involved in the US National Libraries RDA Test in 2010. Backstage furthered training and process adjustments to be prepared for RDA cataloguing when it was fully implemented in early 2013. We welcome partnerships with libraries to develop new programs or processes to help meet these industry changes. One such way we have partnered with libraries is through test or pilot projects. These smaller projects help provide proof of concept, which benefits both the library and us as a vendor. We’ve had test projects finish successfully over the past year involving URI enrichment. We’ve also adapted processes for automated authority control in order to handle non-MARC metadata in digital image collections.

We anticipate our general workflows will continue to serve as good models for processing in spite of changes to guidelines and formats. The success of a project will always require use of a good project management model. However, the changes that will be needed to handle new technical specifications and programs continue to morph. As the industry make decisions on new standards, Backstage will be working alongside libraries to adapt as necessary.
Our contribution to this issue of Catalogue and Index is from a related perspective. At the University of St Andrews we have partnerships with two publishers of electronic resources where we create MARC records which they then distribute from their publishing platforms. One vendor is a commercial enterprise although very much embedded in a digitisation partnership with our institution. The other partner is an open access publisher of electronic books. This work is not the “core” business of our Cataloguing team at St Andrews, but these partnerships have extended our cataloguing skills and knowledge.

MEMSO (Medieval and Early Modern Sources Online)

Our first partnership was established back in 2006. We create MARC records for a commercial database provider who works in partnership with St Andrews Special Collections. TannerRitchie Publishing was set up by two former students of St Andrews, and is an electronic publisher of specialist historical materials pertaining to British history of the medieval and early modern period (1100-1800).¹

Works for inclusion are selected for digital scanning by TannerRitchie in collaboration with the Special Collections Division and the materials are sourced from the Library’s own collections and digitised on site. Users of the digital copies can search the full text of individual electronic books and also search across multiple books and documents. These electronic books improve accessibility to primary key sources for British, English, Irish, Scots and Colonial history. They include publications of learned societies such as the Bannatyne Club, Abbotsford Club and Camden Society, Rerum Britannicarum Medii Aevi scriptores as well as calendars of state papers and publications from bodies such as the Royal Commission on Historical Manuscripts.

SAULCAT, the St Andrews library catalogue already holds metadata for the print resources so these catalogue records provide cataloguing copy for the production of MARC records to describe the electronic publications. The MEMSO publications are issued with a new title page and ISBN representing the new publisher of the electronic resource. At the time of writing (December 2015), there are 363 titles in the MEMSO database. The records can be viewed in SAULCAT² and this same set of records is provided to MEMSO subscribers. Many of the works are multi volume and the actual number of URLs and 856 tags in the set of records currently stands at 1464.

¹. http://www.tannerritchie.com/
². http://library.st-andrews.ac.uk/search~S4?/tMedieval+and+early+modern+sources+online/tmedieval+and+early+modern+sources+online/1%2C2%2C364%2C0B/exact&FF=tmedieval+and+early+modern+sources+online&1%2C363%2C/indexsort=#
### Open Book Publishers

Our second partnership started in 2014 and is with the Cambridge based open access publisher Open Book Publishers. ³ We had already started to create MARC records for the electronic books produced by this publisher because we wanted to enable discovery of open access resources in our library catalogue and discovery service. A chance conversation at an Open Access roadshow held at the University in November 2014 where the founder of Open Book Publishers, Rupert Gatti, was giving a presentation led to further discussions and a more formal pilot project to create a complete set of records for these open access electronic books. This collaboration has resulted in an agreement whereby St Andrews receives a waiver of the Open Book Publishers Membership Scheme annual fee in recognition of the partnership to create MARC records. Open Book Publishers offer a web page for clients to use for record delivery.⁴

A notable feature of these resources is that they enhance content by adding links to interviews, readings, music, etc. both on the publisher website as well as specific links embedded within the works themselves such as audio links.⁵ This of course presents more cataloguing challenges. At the time of writing there are 68 electronic books on the Open Book Publishers platform and the records can be viewed in SAULCAT.⁶

### Why did we become providers of MARC records for these services?

Our primary motivation was to fill a gap in existing record provision, to aid discovery of content and to provide a service where a ready-made set of records could be made available for easy reuse. We needed these records for our own catalogue, so why not make them available more widely.

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⁴. [http://www.openbookpublishers.com/section/47/1/marc-records---the-full-set](http://www.openbookpublishers.com/section/47/1/marc-records---the-full-set)
⁵. [http://www.openbookpublishers.com/reader/346#page/248/mode/2up](http://www.openbookpublishers.com/reader/346#page/248/mode/2up)
One thing that persistently recurs in day to day work as the manager of a University Cataloguing service is the crucial need for us to share metadata. In the world of electronic books and electronic resources there is an even greater need for accurate, timely and ready-made sets of records for content. We constantly crave these from electronic resources vendors and publishers and from intermediary metadata service providers. They save us time and money. They provide a better service for our users to discover the content they are searching for. We know that once these records get into our catalogues then electronic resources usage increases.

For MEMSO we definitely wanted records in our library catalogue SAULCAT so the obvious route was to start to create these ourselves. Once we started to develop the set of content it seemed an obvious next stage to work with our partners at MEMSO to make the set available to their customer base. For Open book publishers the start-up process built on our previous experience with MEMSO. It also had the extra driver of supporting open access monograph initiatives but it had the same aims of making content more readily accessible and discoverable via Library catalogues.

MARC record supply from Open Book Publishing
How records are produced and the cataloguing workflow

We have a particular member of the Cataloguing team, Elizabeth Cuthill who creates these records on our Millennium Library Management System. Elizabeth has developed a workflow which fits in with our other cataloguing commitments and predicts workload on a monthly cycle. New content from both providers is constantly monitored. For example MEMSO new content is posted on their website, or in a soon to be made available list. In the past we have worked from scanning and digitisation lists. The process is to check the website for new additions to the MEMSO database every week. Open Book Publishers similarly post new content to their site which we monitor and they also provide us with regular lists and details of new material.

The chief source of information for the catalogue record for MEMSO is the title-page of the electronic resource. In most cases this is identical to the title-page of the original work, but very occasionally there may be some variation, for example a variant title, and this is recorded in the relevant field in order to link the record in the catalogue with its print original.

The chief source of information for cataloguing Open Book Publishers’ materials is the title page of the electronic book in conjunction with additional information on the publisher’s website. Once cataloguing is complete, a check in SAULCAT ensures both records (electronic and print) are discoverable together and that the all-important link to the electronic resource is working correctly.

Standards

Standards are AACR2, MARC21, LCSH, LC authorities. We have also extensively consulted the Provider-Neutral E-Monograph MARC Record Guide. We have needed to pay particular attention to accurate URL linking using standard identifiers such as ISBN and DOI in 856 tags and also extensive description in notes fields for contents, access requirements and licensing reuse information for open access material. Open Book Publishers use the BIC (Book Industry Communication) subject categories developed for use by the book trade and we are learning how to feed these headings into our subject indexing processes to create LCSH. Our subject indexing also needs to take account of publisher summary information and description of contents.

Scheduling of files and updates

The scheduling of files of new records and updates to records was an important discussion to have with our partners. Currently the schedule accommodates twice yearly or quarterly updates. Updates provide sets of the complete content as well as records added since the last complete update and records that have been edited since the last update. We have not yet had to handle deletions or any withdrawn content but this is something that we need to prepare for. Janet uses the Millennium Create list function and global editor to create and fine tune the record sets. The Data Exchange function on Millennium is used to provide MARC exchange format files, MARC text files and also spreadsheets with lists of the record titles and URLs.

What about RDA?

We will need to decide when to introduce RDA and whether to do this retrospectively on all the content or do a phased approach. We also need to decide about providing alternate sets of records for both standards and how much resource we can devote to this.

How to work in partnership and develop services

Our experience has been a two way exchange of information which helps publishers to understand cataloguing procedures and standards and helps cataloguers understand publishers’ needs. So this is very much a partnership.

The initial setup process for both MEMSO and Open Book Publishers went back and forth to establish what each party required and expected, and also to ensure that adherence to standards were not compromised. In some cases this involved explaining why cataloguers did certain things the way we did, whilst listening to our publishing collaborators’ concerns.

Some examples of the conversations we had with our publishing partners have been:

- Discussions around the precise links in the 856’s in the MARC records and which version of the electronic book they should point to. For example for MEMSO there is a choice between the PDF or a web based search and display format.

- Similar discussions with Open Book publishers debated the merits of using the DOI’s to link to the content and decided that these well recognised identifiers should be used.

- Some debates were about contents notes and the level of detail, clarity and formatting they should receive in the catalogue record.

- Discussions about authority control persuaded us to apply full authority control to these record sets.

- Discussions about the notes used to describe open access resources and the sourcing of information to supply licence and reuse information.

- Debates about the chief source of information for cataloguing. We cannot just use the title page of the digital copy but must also be pragmatic and use information from the publishers’ web pages. For example some information about the extent of the books and pagination is sourced from the publishers’ web pages as well as from the resource itself.

- We recently discussed the inclusion of links to cover images in the Open Book Publisher records and this has now been implemented.

- Discussions around the concepts of authorship and the main contributors to a work. Information on the publishers’ website may almost supersede the information about authorship in the statement of responsibility on the title page of an electronic resource. The roles of authors, editors and contributors can get confused especially if attribution is not clear. It was interesting to explain the cataloguing standards in this context and to explain that a definitive title page can solve many of these ambiguities.

- Discussions and information gathering about how publishers’ metadata flows into the knowledge bases which serve systems such as Library discovery platforms. This can be an interesting learning experience for cataloguers.

One particular practical area that we did try to influence was the availability of previous MARC record sets. We advised publishers to leave sets up on webpages for a while to make it easier for libraries to backtrack if they miss loading content and updates. Many of us may know the feeling when you return to a webpage to find that the update file you need for last September is no longer available. It is useful to be able to influence some standard practices for this.
We supported these initiatives, especially with Open Book Publishers because it was such an opportunity to engage with a publisher and to work together. We both learn a lot. We get good feedback. Of course this is scaleable at present and we would have to think hard about any larger scale record provision exercise.

We do wonder if more libraries might be able to collaborate especially for areas like open access publishing. Perhaps libraries might commit to a standard record creation protocol for any locally created electronic books from their own institution, or anything that gets included in DOAB\(^\text{10}\) (Directory of Open Access Books) or OAPEN\(^\text{11}\) (Open Access Publishing in European Networks). This way a corpus of MARC records could be built up and the creation costs shared. It would be useful to promote good examples of library services and publishers working together in a not for profit environment to create metadata for reuse.

**Observations, challenges and the way forward**

Because the MEMSO set of electronic resources equates with our print holdings there have been opportunities to carry out retrospective upgrading work on print records too. Quite often we add a full set of subject headings, contents notes and add missing headings. Authority work is done on print and electronic at the same time and these are unexpected by-products from our electronic resource cataloguing.

We have used MarcEdit\(^\text{12}\) to help in the preparation and quality control checking of MARC files and have nothing but praise for it as a tool in this sort of project.

Our experiences in providing records for publishers have given more impetus and experience to our provision of records for some local electronic resources.\(^\text{13}\) We have developed a policy for the creation of MARC records for locally digitised rare book material and have started off with a batch of 18 records so far in a pilot project.\(^\text{14}\) In addition we create metadata for a set of open access midigraphs published by the Centre for French History and Culture of the University of St Andrews.\(^\text{15}\) We have discovered the value of being proactive in metadata creation for local resources and making them discoverable in large aggregations such as Worldcat and COPAC. The record sets for MEMSO and Open Book Publishers are also loaded into Worldcat and the RLUK database for reuse by other agencies.

We set ourselves high standards of accuracy and quality control for our regular institutional cataloguing to serve the needs of our users. We are certainly operating in a different mind-set when we create these electronic resource record sets compared to our institutional cataloguing. If anything we have put more pressure on ourselves by working specifically on sets of records that will be reused by our own profession. We want to get it right for you! This makes us conscious that we perhaps still have work to do to refine the elements of our electronic book cataloguing standards. We debate about vendor neutral standards and specific rules for reproduction statements and notes. We have found that the challenge is to combine international standards with the most efficient way to get records right for our own local catalogue environment and needs and also for a wider group of consumers including our publishing partners and the research and teaching community. So we would acknowledge that our records are not perfect. However we are becoming far more thoughtful about our cataloguing and how we need to meet the needs of a global audience and multiple audiences. So this is a good learning process for us as professionals and it has been an enriching experience.

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11. [http://www.oapen.org/home](http://www.oapen.org/home)
13. [http://arts.st-andrews.ac.uk/digitalhumanities/books](http://arts.st-andrews.ac.uk/digitalhumanities/books)
Janet Aucock is Head of Metadata and Content Acquisition at the University of St Andrews. She started her career as a cataloguer and has continued interests in metadata for all types of resources.

Elizabeth Cuthill has been a member of the Cataloguing Team at St Andrews since 2005 and has recently started to specialize in the cataloguing of digital and electronic resources for these specific projects.

#cig16 Call for Papers

Proposals for papers are invited for the Cataloguing and Indexing Group (CIG) Biennial Conference 2016 “Innovation and discovery” to be held from 31 Aug - 2 Sept 2016 at Swansea University.

Moving from local to global, our audience’s thirst for discovery is prompting a whole raft of innovations. In this era of convergence, libraries, archives and museums are all striving to improve resource discovery in order to meet user expectations. International committees are expanding and refining new bibliographic standards; libraries are adopting (and adapting) these standards, e.g. FRBRising their catalogue records; as a result, librarians are acquiring new skills in metadata creation and manipulation; and, in this ever changing environment, vendors of library management and discovery systems are under pressure to evolve their offer. Hidden from public view, library metadata policies, cataloguing workflows and practices, together with the systems we choose, ultimately determine the user experience. The 2016 conference aims to bring together the metadata community in order to debate systems and processes, shine a light on best practice and explore the unknown.

Themes:
CIG welcomes proposals that cover, but are not confined to, the following topics:
metadata for discoverability, linked data, controlled vocabularies, data manipulation, authority control, discovery systems, impact of changes to scholarly communication
And - as always - we’d like presentations about current practice, recent research as well as ideas for the future.

Formats:
We are eager to hear from information professionals and those engaged in metadata research and practice. We also encourage submissions from current and recently graduated LIS students who would like to take this opportunity to present their research to the cataloguing community. We welcome proposals in the following formats:
Conference papers (30 mins). An opportunity to present how your work, project or research innovates discovery.
Lightning talk (10 mins). Shorter presentations on the above topics and themes. Please consider this if you have something to share but do not have a full conference paper.
Interactive sessions (up to 30 mins). With the venue offering breakout rooms, we particularly encourage presentations with interactive elements.
Posters. An opportunity to present your work/project/research in visual form. Time will be included during the conference to allow poster presenters to engage directly with delegates and discuss the contents of their poster. Please consider this if you would prefer to present in a less formal way.

Submissions:
Proposals should be submitted to Robin Armstrong Viner r.armstrong-viner@kent.ac.uk. Please include your preferred format, a working title and short outline (no more than 300 words) of your presentation. Proposals are due by 31st March 2016 and presenters will be notified by 30th April 2016 if their submission is successful. Speakers will be able to claim for travel and accommodation (if required) in line with the CILIP expenses policy http://www.cilip.org.uk/sites/default/files/documents/Expenses_policy.pdf. Any presenters wishing to attend the full conference in addition to the day they are presenting, as well as those intending to travel from outside the UK are advised to contact Robin Armstrong-Viner r.armstrong-viner@kent.ac.uk before booking or making travel arrangements.
Seven hours after boarding the train in Borth, west Wales, I climbed the Scottish national library steps, somewhat surprised that each train connection and my map reading had gone quite so smoothly.

I was at the National Library in Edinburgh as an ‘Observer’ at the Joint Steering Committee (JSC) for Development of RDA (Resource, Description and Access) and was intrigued to find out what this really meant; what I would see and hear, and what would I think about doing this for the next day and a half.

To the surprise of some on the JSC – never mind to many librarian colleagues – I had actually applied for a bursary to attend as an observer because in my day-to-day job I realise I haven’t kept up to date with RDA developments.

Once we got an RDA policy in place and some template-type instructions I can’t say I’ve used the toolkit for much more than relationship designator advice…if I try anything else I am scared off by the time I feel I need to learn how to navigate it. But I like RDA and what it stands for, and I get excited by the idea that our records are/can be one day, accumulations of data that can be shared in both library settings and unforeseen scenarios. I thought, if I get myself a bursary and just go, I might just soak up some understanding and ideas through sheer exposure…

I was ushered in and took the first seat I could to avoid interrupting the discussion going on around the table the middle of the room. A few other observers were dotted about the room along the walls – and the discussion was quiet. Quite unlike a noisy academic gathering, here were 12 librarians battering out developments and wholesale changes to international cataloguing rules and modeling, quietly listening to reports on papers and proposals from members of the American Library Association, the Canadian Committee on Cataloguing, the Australian Committee on Cataloguing, our own British Library, the Library of Congress and the Deutsche Nationalbibliothek.

Perhaps this isn’t everyone’s cup of tea. But I arrived for “15. Models: extension and refinements” and the first proposal was “Place as RDA entity” which, like most items on the agenda, proved to be a lot more complex than it might sound. At Aberystwyth we do some original cataloguing, a lot of copy cataloguing, and a lot of checking of shelf-ready records. ‘Place’ we deal with in 260/264 fields in Marc 21, ‘place of publication’ – Talybont, Ceredigion, for Llolfa Press, for example, in the 008 which might refer to place at another, usually broader level – wlk for Wales, and in a 651 if the place is significant as a subject heading, Wales – Fiction –20th century, perhaps.

We’ve all come across those awkward cases though, where we ask ourselves which level of ‘place’ are we recording, and for whom? Politically contested places, overlapping regions and national parks, mountains, villages, and altered national boundaries, all offer awkward choices for the cataloguer. My MA was in Literature and Environment in Reno, Nevada, a state that achieved ‘statehood’ in order to help ensure Abraham Lincoln’s re-election and there were many who wanted to rescind statehood in the years following the civil war because, in their view, Nevada didn’t meet the requirements for or the expectations that the designation ‘state’ implied. That it stayed a state was largely due to its development as a unique provider of services illegal elsewhere – boxing, prostitution, gambling and divorce. In this strange and strangely beautiful place we studied space and place as historically constructed terms that continue to be challenged and negotiated.

To see a group of librarians¹ negotiating the key philosophical dilemmas of our time in order to futureproof our data by sharing practices across places and cultures for interoperability, was just great.

¹. Admittedly of the largely Anglo-American world currently—there are plans to change this though, see [http://www.rda-rsc.org/rdaboard](http://www.rda-rsc.org/rdaboard)
With the pragmatic if problematic aim of getting everyone to agree on a way to describe something that itself can be slippery, something that changes over time (would we, for example want to be able to talk about Edinburgh in 1,000 A.D. and Edinburgh in 1750 and Edinburgh in 1830 as disambiguated places?). The philosophical debate was grounded in the tools and expectations we have around us. Could we use coordinates of boundaries, they asked, or shared vocabularies (like GeoNames) and data from GIS systems? And we must always leave room for cataloguers to use alternatives, as RDA tries to model elsewhere, as long as cataloguers also identify the tools or methodology used.

The discussion took in human meaning, when Americans talk about the US, for example do we need to know if they refer to the 51 states, or the continuous land mass bordering Mexico and Canada, or a particular set of coordinates? Or does it all depend upon context? And ultimately, the problem within RDA was boiled down to the slippage between Place and Jurisdiction, a slippage that allows us to sometimes to treat corporate bodies as places…which perhaps reflects how we deal with place in the real world. Passports, procedures and treaties, countries, borders and governments often finally decide for us where one place ends and another begins. It is a lot easier as a cataloguer to refer to an established county than to something like mid Wales – which is not quite equal in weight to North or South Wales as a term but accurately disambiguates the area for a lot of people where I grew up.

Luckily the discussion did not need to end in a decision that day – it was on the agenda to raise issues that would be faced in the future as other reports (like that from FRBR’s Library Reference Model) are published and impact upon RDA. So, from places on the moon, to fictitious landscapes (Narnia or Middle Earth, for example) to places with contested ownership (the West Bank even according to just one treaty like Oslo 2, for example), issues were certainly raised and not just contained within place – the chair, Gordon Dunsire, was anxious to contextualize the discussion about place in the wider conceptualization of entities in RDA. Can some be first class (WEMI entities, see “Theoretical foundations of RDA (or, what is WEMI?)”) and others second class (persons/families/corporate bodies, for example, and, perhaps, one day, place)? Or should we be trying to talk about ‘data’ more equally, especially if we hope to work more closely with archives and museums?

I heard the JSC talk about transcription (what it is, it isn’t, and how it is different from ‘record’), ‘contained in’ and ‘container of’ relationships, aggregates and relationship designators. I think I followed about 50 percent of the discussion and have long list of acronyms and terms to chase up (LRM, ONIX, FRBRoo, and Nomen entity, to name a few) but for a moment, the work that we do – the practices we follow and the very many questions that I often have but rarely ask anyone about – came to life. The flat bib records I deal with everyday looked a bit like accumulations of different types of data that can be used in different ways by different people...

I used to be a stringer for the BBC at election time and I can remember the first time I entered my local town hall at 9pm along with a 100 or so counters (mainly women) with fizzy drinks and sugary snacks to get them through till dawn. We waited for the first black box to appear with each individual’s vote and through the night and early into the morning these votes were sorted into piles while observers and candidates walked around the tables and drank copious amounts of tea and coffee. It sounds absurd but I felt like I was witnessing democracy in action – it was literally a mundane set of procedures for our peers to accountably count lots of bits of paper.

2. This afternoon I have just catalogued Edwards, Malcolm Realms of Fantasy: an illustrated exploration of ten of the most famous worlds in fantasy fiction Limpsfield : Paper Tiger, 1995
Thankfully the JSC did not involve the 5.30 am finish of election night (rather, a nice meal and a glass of wine) but observing the JSC (now RDA Steering Committee, see http://www.rda-rsc.org/RDAgovernancefirststep) felt a bit like that, like watching peers trying to develop our practices for the future without railroading anyone or pretending that there aren’t a mountain of problems to get through or around – but plugging on anyway, because that way our work as library cataloguers isn’t wasted.

So, thank you to the JSC for a good couple of days, and thank you to CIG for affording me the opportunity to observe RDA in the making and to sit and listen to lots of people talking about cataloguing!
Catalogue & Index is electronically published by the Cataloguing and Indexing Group of the Chartered Institute of Library and Information Professionals (CILIP) (Charity No. 313014)

Advertising rates: GBP 70.00 full-page; GBP 40.00 half-page. Prices quoted without VAT.

Submissions: In the first instance, please contact the Co-editors: Helen Garner (h.j.garner@shu.ac.uk) and Karen Pierce (PierceKF@Cardiff.ac.uk)

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ISSN 0008-7629

CIG website: http://www.cilip.org.uk/cataloguing-and-indexing-group/catalogue-index

CIG blog: http://catandindexgroup.wordpress.com/

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